

# Client briefing

## Selecting design and development partners

Public sector clients play a leading role within the development team in gathering together new partners during procurement processes and in prioritising quality places. The right expertise must be in place to make this happen, from inception through to realisation.

This client briefing offers supplementary guidance to CABE's *Creating successful masterplans* client guide. It describes how briefing, evaluation and selection processes can be structured to deliver successful, well-designed places. The briefing should be read in conjunction with a partner briefing, *Agreeing a procurement strategy*.





Gunwharf Quays, Portsmouth © Berkeley Homes/Simon Winson

**Selecting design and development partners is structured as follows:**

**1. Structuring the process**

- developer, designer or both?
- a clear and efficient process

**2. Briefing materials**

- communicating the development opportunity
- the invitation to tender and expression of interest
- the detailed brief
- testing the design approach

**3. Selection**

- criteria for selection
- the selection panel
- interviews
- the tenderer's perspective

**4. Common problems and suggested solutions**

*Creating successful masterplans* sets out the requirements of OJEU procurement processes. This briefing explores the detail on how to deliver high quality outcomes through those processes.

It focuses on specific advice for briefs and for selection criteria for the procurement of design and development teams for large-scale development or regeneration projects. The briefing complements *Agreeing a procurement strategy*, and should be read in conjunction with it.

This briefing focuses on the role of the public sector client, but is applicable to other commissioning clients, and includes advice for those bidding for commissions via public or private sector led selection processes.

Gunwharf Quays, Portsmouth is a 2008 Building for Life award winning scheme. The site was included within a masterplan that incorporated existing historic structures and important waterfront features. The various buildings were designed by a variety of architects over a period of 10 years.

**“Preparing briefing materials and structuring the process should not be seen as routine project management activities. It is during these stages that a client can exert its influence strongly in framing the direction of a project and, ultimately, shaping the built environment itself”**

## 1. Structuring the process

A selection process structured over several stages allows progressively clearer expression by interested partners or candidates of how the project vision and brief will be achieved. It also gives the client an initial opportunity to identify detail about the experience and skills of a candidate and its ability to carry out the project within the right financial package, prior to a more intensive examination of issues relating to the project in hand.

### Developer, designer or both?

Selection processes might be about choosing a developer, a consultant or both. These issues should be addressed as part of a procurement strategy (see *Agreeing a procurement strategy briefing*). Before a client starts a briefing and selection process, it is important that they consider how the different parties may be appointed and interact and, in particular, how the best and most appropriate design skills can be harnessed.

For example, sometimes it is appropriate to select a developer without a design team and then select designers. One way this could be done is by involving a development partner in a competition for invited designers.

The client's aim should be to arrive at a shortlist of organisations that offers a range of different approaches to the issue. Authorities should actively encourage smaller design practices who demonstrate innovative approaches as well as more established organisations.

Castleford footbridge, Wakefield © David Millington Photography Ltd

### Case study 1: Wakefield developer framework prospectus

Faced with bringing forward multiple housing and regeneration sites in a single programme, Wakefield Council decided to appoint development partners to a framework to enable efficient procurement of pre-selected developers to sites over the coming years. Packaging sites together made them more marketable to prospective partners and, to emphasise this, the council prepared a development prospectus for interested parties, ahead of progressing with the procurement process.

The contents list of the prospectus was:

1. Introduction – aims, vision, council policy
2. Site details – initial development opportunities
3. Description of works – standards required, contractual details
4. Procurement – process for the framework and site allocation
5. Indicative timetable
6. Q&A and contact details.

This illustrated the sites, set out the opportunities and likely process, and captured the standards the council was seeking. Wakefield took advice from CABI enabling on how design aspirations might be evaluated in the selection process and how the skills expertise to do this might be accessed. The brief set a range of requirements on design, including adherence to a number of standards but, for the competitive process, it was agreed that a Building for Life (BfL) evaluation of case study schemes was appropriate for testing the design response of the bidders. CABI then ran a BfL workshop to equip officers and community representatives with some of the skills to make their own judgements about design responses, and participated in the selection process by conducting written BfL evaluations of the bidders' schemes. The decision from an early stage to aim high in terms of development standards led the council to think of ways to communicate that aspiration and to seek expert advice and capacity building in order to make it happen.



Wakefield Council has a number of ongoing regeneration projects. These include the Castleford footbridge, hailed as a potential catalyst for further regeneration of the Castleford Bay area

### **A clear and efficient process**

Information issued at each stage should clearly state the requirements for quality and how these will be judged. It should not be necessary to ask for exceptionally detailed information or design proposals at the first stage to make relevant comparisons between tenderers. This can dissuade organisations from participating and unnecessarily narrow the field only to those with the resources to compete. It also places a serious burden on the authority in evaluating the submissions.

Using several stages and being clear about commitment to design requirements at each is a good way to prevent an unreasonably large number of teams preparing preliminary designs.

#### **Good practice in all parts of the process includes:**

- providing all relevant information clearly, succinctly and consistently to all tenderers
- clearly defining the details and purpose of any exercise to avoid tenderers undertaking abortive work
- devising requirements to generate useful analysis and ideas – a good way of injecting fresh thinking into a process
- paying tenderers an honorarium for their work, stressing in the brief that a consequently high standard of work is expected
- seeking assurances that a tenderer will retain the consultant team it used through this competitive process.

## **2. Briefing materials**

### **Communicating the development opportunity**

For a major area of change, it is important that all communications send out positive messages and generate interest and excitement. Before any invitation to tender is issued, it is worth investing in a document or some marketing material that sets out the development opportunities and encapsulates aims clearly, succinctly and attractively.

The standards set in preparing a prospectus, visioning document, brief or invitation to tender (in terms of graphics, language and clarity of aims) will tend to dictate the quality of responses from applicants. In particular, it is very important to use drawings showing prospective sites in the wider spatial context. These should be of high quality and include key strategic infrastructure. They should indicate major areas of change and activity such as regeneration projects, areas of growth, or those covered by area action plans.

There should also be a basic description of the commission. There is no reason, however, why an organisation should not go beyond OJEU requirements and include expression of an overall development vision and an indication of the spatial planning context.

Procurement rules often prevent authorities from repeating questions in the second stage of a tender process that were asked at the first. Although it is not necessary to have completed the detailed brief when the expression of interest is issued, authorities should therefore ensure that they structure the first-stage

questions to avoid precluding them from asking the more detailed questions at the second stage. (This is one of many good reasons for establishing clarity at an early stage with legal colleagues about rules and regulations in relation to procurement.)

For example, a broad commitment to achieving higher standards of Building for Life or the Code for Sustainable Homes can be secured through response to the expression of interest. Tenderers can be asked to provide examples of where they have met these standards on past projects. They may also be asked to commit in their response to a formal design review at key stages, or to using design quality indicators (DQIs).

Tenderers can also be asked at the second stage to demonstrate in detail how they would respond in a given scenario in order to meet design and development standards.

Bidders can begin to understand the full context by being fully briefed on the relationship between settlements and access to transport. From an early stage, prospective partners should be encouraged to take a wide and flexible view of study areas, understanding that the impact of areas they may be working in extends well beyond the sites, neighbourhoods or towns and cities in question.

## Case study 2: Merton Rise, Hampshire County Council

Hampshire County Council's approach to marketing development sites at North Popley demonstrates the value of being clear and concise about aspirations from an early stage and avoiding any doubt about how the process is going to work.

Tibbalds Planning and Urban Design helped the council devise a summary brochure for the first stage, in which the clear aspiration for high quality design was introduced. This was supported by a pack with more detailed information and design guidance based on the outline planning approval.

The council has historically marketed its land with the benefit of outline planning permission based on an initial development brief or masterplan. This serves to maintain value, protect the council's interest where it

has neighbouring or retained land, and protect the council's legacy. It also gives greater certainty for developers.

The first stage of bidding was based solely on design. The council held workshops during this stage to comment on emerging designs. Stage two comprised a review of shortlisted designs with a specific feedback session to deal with any outstanding concerns as well as details of the developers' approach and financial offer.

This process generated a different range of bidders and a number of them reconsidered their approach and even changed their design team following introductions at the launch event. There was also an improved understanding of the high quality aspirations of the county council as landowner.

For more information see:  
[www.mertonrise.co.uk](http://www.mertonrise.co.uk) or  
[www.hants.gov.uk/mertonrise](http://www.hants.gov.uk/mertonrise)



The first houses, designed by Fraser Brown McKenna Architects, are nearing completion

### Case study 3: Oldham-Rochdale pre-qualification questionnaire

The Oldham-Rochdale Pathfinder sought developer partners for each of three neighbourhoods.

A pre-qualification questionnaire was issued, which set out to test the design commitment of bidders by requesting examples of developers' experience in, and approach to:

- building design; the costs of buildings over their life cycles and the involvement of ultimate users throughout the design and commissioning phases
- urban design, design quality and sustainability in delivering the revitalisation of existing housing areas
- how the developer has incorporated environmentally sustainable design and specification into similar projects.

### The invitation to tender and expression of interest

The invitation for expressions of interest or pre-qualification questionnaire (PQQ) should ask for basic information about an organisation or team and its broad approach to design and development. Organisations can then be shortlisted relatively easily in accordance with technical requirements. CABE's *Creating successful masterplans* sets out the following contents for a PQQ:

- previous work and commitment to design quality
- range of skills
- size and type of similar projects undertaken
- CVs of key personnel
- availability during the project period
- number of professionals
- references from previous clients
- sustainability policies
- experience with multi disciplinary teams
- equal opportunities policies
- financial stability (based on financial checks)
- quality assurance procedures
- size of firm.

### The detailed brief

For the second stage of the tender process, a clear brief must be written that incorporates quality issues. It should be explicit – **defining what the client means by quality** and what the parameters and process for judging this will be. It need not be complete when the expression of interest is issued, but there must be a well-developed idea of what it might contain at that stage, and how response to it is to be tested and evaluated. The time given to tenderers to respond to the expression of interest should be used to refine and complete the

detailed brief to provide full and timely information to shortlisted organisations as necessary.

Briefs for appointing consultants need to be fit for purpose, depending on the commission, although the format and content can be standardised. Guidance on preparing briefs can be found in *Creating excellent buildings*, *Creating successful masterplans* and *Urban design compendium 2*. Model briefs from previous projects or from colleagues elsewhere should be saved in order to avoid reinventing the wheel and to ensure that all the necessary points are made and topics covered.

For distinct sites or development programmes, and to attract development partners, **development briefs** or **planning briefs** can be prepared that draw on the vision and objectives but are more directed towards development outcomes. Whether the commission is for a single development project or as lead partner for the advancement of a spatial framework, for example, the development brief will set out baseline and other technical information and parameters that the applicant should follow (see box overleaf). A masterplan itself is often regarded as and adopted as a development brief. A good brief includes pertinent and accurate drawings and graphic information in three dimensions where possible, avoiding at all costs inaccuracies and contradictions between drawings – with regard to site boundaries, for example. Drawings can obviate the need for lengthy description.

A development brief allows a client to move beyond national and local guidance and make specific

prescriptions and set out desired outcomes for a given area or site. It can be specific about planning requirements, or reflect particular aspirations established through community consultation. As part of the brief preparation process, it is advisable to consult with colleagues in other departments and with partner organisations about aspirations based on past experience. This itself can be informed by audits or post-occupancy evaluations of recent development in the area, to establish typical failures and key successes.

Whatever type and scope of brief is being employed, it should set down the vision and objectives and state not only what functions will be developed but also requirements for the level of quality to be achieved and how this will be judged. Shortlisted tenderers should be asked in detail about their views on important aspects of design and how quality will be realised in the project.

**Testing the design approach: the case study**

As part of the second stage, or as a further step, it is common to request shortlisted teams to prepare concept designs for a sample site. This is a useful way of giving a competitive process a design focus, and providing design input to generic and site-specific issues. It can be used to help appoint developers, designers or both.

A case study exercise should be introduced in a prospectus or visioning document and described in detail in the brief for tendering consortia. This should include clear selection criteria for each stage, setting out how proposals are to be assessed and evaluated.

**As a minimum, the brief for a development area should include:**

- development vision
- strategic objectives
- outputs and outcomes to be achieved
- how the development process should proceed
- contextual and background information:
  - market demand
  - policy context
  - site and area analysis
  - land ownership and tenure
  - highways information
  - existing buildings
  - infrastructure and services
  - design principles.

The site or area analysis of existing physical conditions is a particularly important part of this. Providing it in a clear and succinct manner not only saves bidders from engaging in abortive work, replicating analysis that already exists, but also shows the client's commitment to taking a thorough, evidence-based and design-led approach to the development

Usually, the authority would be committed to taking the preferred scheme through to detailed design, but it is also possible for this to be an entirely theoretical exercise to test a design response on a site. For this first commission in a wider development programme, an authority will generally have to commit greater resources to conducting the selection process, and may need to take advice from other agencies on specific issues such as design. It is therefore worthwhile selecting a site where ownership and context

process. An authority should judge for itself what baseline information is significant and use the opportunity in the brief to prioritise that information for bidders. As a guide, analysis might consist of:

1. Historic context
2. Movement and connections: pedestrians, public transport, vehicles and parking
3. Urban design appraisal: landscape and topography, public and private space, continuity and enclosure, legibility, scale and massing, character and distinctiveness
4. Public realm and open space character: hierarchy and structure of open spaces and routes, streets, public spaces, private space and leftover space
5. Existing land uses and activity: residential, commercial/retail, community and amenity.

make it possible to deliver a truly exemplary development. That way, it can set the tone for what follows. If the process is being used to select a lead partner for a development area, the case study scenario might be less focused on a fully resolved design response for a site, and more on an urban design approach to a wider area. Model scenarios often ask bidders to present both detailed proposals for a site and a framework for a wider area.

#### Case study 4: Renew North Staffordshire

As part of its HMR programme, Renew used the developer procurement process to find lead development partners for its areas of major intervention (AMIs), but it also required them to play a major role in setting the strategic spatial framework. The lead development partners therefore have both strategic (spatial planning) and delivery roles. They must also commit to working with RSL partners in those areas, chosen through a separate process.

The model scenario for prospective panel members required them to undertake two design assignments: framework proposals for the wider area and detailed proposals for the case study site. Assessment criteria were as follows:

#### Wider area vision

- response to strategic planning, restructuring issues
- appreciation of urban planning principles and concepts.

#### Case study proposals

- development proposals narrative
- assumptions made and rationale
- drawings and sketches
- consideration given to sustainability, infrastructure capacity, and cost reduction in the construction process.

To respond fully, the developers had to include in their team expertise on masterplanning at the wider scale. Once lead partners for each AMI were selected, their consultants were required to begin working on a detailed area regeneration framework (ARF) for a client team that included the developer partner, the HMR partnership and the local authority.

Lead partners were procured to develop the vision and detail of the wider City Waterside masterplan by EDAW



City Waterside, Stoke-on-Trent © EDAW

## Case study 5: Oldham-Rochdale partners in action

The Oldham-Rochdale HMR partnership used a model scenario to test design in its second stage selection for developers. The evaluation methodology for the submissions was set out in the brief, specifying the purpose and weight of the case study exercise. It was made clear that bidders would be evaluated on:

- compliance with requirements
- added value and innovation
- financial implications to the councils
- suitability, achievability and viability of the proposals
- design standards
- local socio-economic impacts.

The model scenario comprised two separate case studies. The first gave details of a site and its context, with housing market and development guidelines including target density, tenure types and household size. Consortia were invited to challenge these assumptions if they wished.

Bidders were asked to provide detailed design proposals for housing, private and public open space; an indicative palette of materials including street furniture and lighting; detailed proposals for parking; and landscape maintenance arrangements. They had to address the housing market, tenure, affordability and technical issues, showing clearly the relationship between site analysis, design development and proposals for sustainability elements. The case study also required a full financial appraisal, funding, cost and income schedule, programme information, risk assessment, project management, training and employment, as well as consultation and community involvement proposals.

The second scenario was a live scheme, being developed with an RSL and their designers, with Housing Corporation funding. It was devised to test partnering efficiencies including cost savings and added value.

Design was a specific area in the invitation to tender (ITT), requiring detailed responses on the consortium's approach to masterplanning, urban design and design quality, plus evidence of experience in good place making and urban design.

In their submissions, developers also had to address:

- sustainability
- community consultation and engagement
- mixed use development
- the financial return to the councils
- training and employment
- previous experience
- performance management
- value for money
- risk management
- a priced submission for refurbishment works
- insurance
- social inclusion.

Planners and highways officers from both local authorities were involved in assessing the case studies submitted by developers.



Oldham-Rochdale Partners in Action and preferred developer BASE (Barratt Urban Regeneration and Artisan) have delivered 25 modern interpretations of the traditional terrace house to provide larger family housing at Trafalgar Street in the Wardleworth area of Rochdale

### 3. Selection

Regardless of how a procurement process has been structured, and whether it concerns appointment of developers, consultants or consortia that include both, some common issues apply with regard to selection. This section focuses on testing responses and attitudes to design through a selection process.

#### Criteria for selection – quality over cash

Ultimately, through any procurement process, the design quality of proposals depends on the skill with which the vision is interpreted to create viable places. Responding to the needs of a particular programme, project or site, and properly understanding a place, requires particular skills. The **criteria** for evaluating any prospective partner should therefore be weighted more heavily for their experience and evidence of design skill than for the tender price. A balance that has been successful in many instances is 60 per cent technical capability/design quality.

The 60 per cent can be broken down into:

- 15 per cent experience and track record, individuals' CVs and project types carried out
- 15 per cent scale and complexity of previous projects, including referees for relevant projects
- 30 per cent proven design quality of the team shown by awards, visits.

Foxhill, North Sheffield © Mecanoo Architecten BV



The selected scheme designed by Mecanoo Architecten BV for Artisan

#### Case study 6: Foxhill, North Sheffield

Sheffield's ITT for its Foxhill site presented a market brief for bidders. The selection criteria comprised delivery, regeneration, design excellence and a financial package, weighted as follows:

##### Delivery/track record (20 per cent)

Development and design team details and their involvement at each stage, highway design, programme, sales and marketing.

##### Wider regeneration impacts (25 per cent)

Consultation and involvement, regeneration, sustainable transport and sustainable communities including:

- accessibility
- open space and public realm
- neighbourhood management
- community development
- community benefits.

##### Design excellence (25 per cent)

Including: the developer's view of key site features; design statement; concept plan; site layout plan; three-dimensional drawings to indicate the appearance of the proposals in context; a study board of

building types; materials and hard and soft landscaping finishes; detailed drawings of a typical dwelling type with an outline specification; and cross-sections to show how the development would sit within the given topography.

Developers were asked to provide details on; how a sustainability appraisal would be used; sustainable building methods proposed; use of renewable energy; how to achieve Building for Life and Secured by Design; and how the project could showcase and promote the benefits of high environmental sustainability standards. A visit to a comparable development chosen by the client from a range offered by the bidder was requested.

##### Financial package (30 per cent)

A development appraisal to include an offer for the land in a standard format provided by Sheffield, as well as a marketing and financial report.

In this example, the council chose the bidder offering the lowest capital receipt because it proposed an exemplar project to bring about transformational change.

The remaining 40 per cent is on tender price, either the cost of the design work, or the money being offered for the site by a developer.

Merely weighting a balance between financial and design considerations may not be enough to ensure that a poor design approach is unacceptable. It may be necessary to set a minimum threshold, or set of thresholds, on design. Failure to meet any one of these would disqualify a bidder regardless of the financial offer. One way of facilitating this approach, is the 'two-envelope' system of procurement. Here, selection on the basis of design capability and experience can be carried out without any information about cost or bid price. These remain in sealed envelopes and only when teams with the right approach and capacity have been selected are their financial bids reviewed. At this point the lowest cost – or the most realistic – bid can be chosen.

### **The selection panel**

Consideration should be given in the project plan to who will be represented on the selection panel. Ideally these individuals and organisations should be approached at an early stage as they may wish to be involved in structuring the process, or at least be appraised of progress at key stages.

As well as ensuring that conflicts of interest are avoided and that relevant stakeholders are involved, thought needs to be given to the skills of those participating. It is important to include urban design and architectural expertise, either through representation on the panel or as advisory members. Their input must be weighted appropriately in the overall scoring. In some cases, an external evaluation may be commissioned that is then made

available to selection panellists but this should be to support, not substitute for, appropriate design expertise on the panel.

All members of the selection panel should discuss the design proposals in the context of their detailed local knowledge and the requirements of the brief, but the formal scoring of the design proposals should always be completed by an appropriately trained and experienced design evaluator. It would not be acceptable for all members of the panel to score a financial offer and it should not therefore be acceptable for all parties to score design proposals. If multiple parties are required to make a design evaluation, authorities might take the opportunity to offer

prior training or briefing to equip them with the skills to do this.

### **Interviews**

These are a useful tool in achieving design quality, to explore design proposals and test assumptions. They should not repeat material covered by the submission. The client can use this opportunity to review the proposals with its experts and the bidder's design team in a workshop setting, as well as more formal question-and-answer sessions. Interviews are an opportunity to meet the team and assess how relationships may work. The interview stage can benefit from the involvement of local residents and stakeholders, although this can be a separate consultation activity.

### **Case study 7: Norwich City Council**

Norwich City Council wished to appoint consultants to produce an outline masterplan (phase one) for the St. Stephen's Street area of central Norwich. With CABE's advice, the council devised a selection procedure that used officer time and resources efficiently, and prioritised the role of good design through the process.

Nine practices were long-listed after submission of an expression of interest. A day was set aside for all interested parties to be taken on a comprehensive tour of the masterplan area and to have access to a 'data room' within City Hall, where all relevant policies, reports, maps and other information for all practices would be on hand. This was seen as an efficient and cost effective way of providing access to council information.

A panel which included council officers' representing several departments, shortlisted three of the practices and issued them with tender documents. Consultants were asked to submit a written submission and a fee tender in two separate envelopes. An explanatory note was included in the tender to clarify that selection would be based on the quality of the written submission and the interview process, before the fee tender was known.

During the interview process, consultants were asked to present their proposal and were asked to select three questions to answer from a list of 10, all of which were based closely on the judgement criteria. This proved to be a good way of observing how the teams interacted and what issues they prioritised. The final selection was made following the interviews, with the client satisfied that the best team had been appointed at a cost within budget.

### **The tenderer's perspective**

Those structuring a procurement approach should consider the resources a prospective partner may need to commit in order to be successful through a selection process. Developers and consultants alike prefer to work with clients who demonstrate an understanding of their needs and priorities, and whose requirements are clear and geared towards agreed outcomes. In setting out the selection process, it may be worth authorities bearing in mind that tenderers will respond better and, if selected, ultimately enter into a more fruitful working relationship if the following are in place:

- clarity and transparency around all aspects of the project
- an attractive and realistic offer in terms of land and development prospects
- realism about the process
- information that is readily accessible and whose importance and implications are clear
- openness about the skills and capacity available within the authority to manage and support the process
- clear expectations about skills and use of consultants – what skills are a bidder required to bring as part of its team?

## **4. Common problems and suggested solutions**

### **The responses to a brief fail to demonstrate an understanding of how the place works, concentrating solely on the site in question.**

Ensure the brief clearly sets out the requirement to respond to the wider development context, asking specifically for a drawing at the larger scale showing the site in context. If the brief includes a very clear drawing showing some of the wider strategic issues, tenderers are more likely to respond using this scale.

### **The creativity, ambition and vision diminished from stage one to two as bidders were shortlisted and the prospects of having to deliver on the submission increased.**

Ensure that a case study site is based on some prior spatial planning work and testing, giving the authority and selection panel an indication of what a realistic and deliverable response to a site may be. Structure the process so that stage one measures capability, capacity and track record and stage two tests the ambition and vision.

### **The responses predominantly employ the developer's standard house types, with little relationship to the local vernacular.**

Standard house types are not necessarily a problem, provided they are employed on a well structured and laid-out site. Types and basic internal layouts can be adapted by a skilled housing architect to relate to a range of different sites and place types. It is better to ask for a bespoke

response to place and urban design issues than to demand bespoke types across the board.

### **The successful bidder used a strong design and consultant team to win the commission but did not retain the same team through to detailed design.**

Include in the brief a requirement for retaining the stated design team, and ask the bidder to reiterate this commitment in their response.

Give appropriate contextual information in the briefing around character and place attributes, highlight the need to respond at the urban level and demand that proposals are illustrated in the context of the existing built and natural environment.

### **The evaluation panel members' scores varied greatly.**

The more agreement there can be from an early stage on vision and principles for development, the better. Panel members should be well aware as early as possible of the brief, evaluation criteria and weightings, and scoring sheets should be made as simple as is feasible. Reference to external standards and methodologies is a good way of avoiding divergent scores. Consider either some basic training (in Building for Life, for example) for panel members, or taking expert advice on design aspects from a design professional. Be aware, however, that this can be resource- and time-intensive and any way to streamline the process – such as subjecting only two or three of the shortlisted schemes to intensive review – should be explored.

**It was difficult to evaluate bids against each other because the type and structure of the information provided was completely different for each bidder.**

The more you can specify the information you would like to see from bidders at each stage and the more succinct and pertinent you can make this, the better. Prescribing the maximum length of the submission or indicating a structure for the response is a good method. Think carefully about the way bidders are likely to respond to a given question. Completely open questions such as 'Describe your organisation's approach to environmental sustainability issues' tend to invite lengthy responses that are hard to evaluate and compare. It would be better to ask for an example of where the bidder has built to high environmental sustainability standards, or to ask for a written commitment to meeting a certain standard.

**Some design proposals meet the brief well but are uninspiring. Others are more ambitious but do not stay within the expected parameters. The panel finds it difficult to come to a shared, objective view on the relative merits of these proposals, even when it applies evaluation methodologies and takes advice from a design expert.**

The brief should be structured to allow some flexibility and the expression of creativity in response. It can be useful to set out 'absolute' and 'desirable' requirements, giving the bidders an opportunity to understand what the priorities are and which parameters may be more flexible. Structure the evaluation criteria and weightings to give at least some reward to 'the unexpected' – make it clear to bidders how open the client is prepared to be to challenging the brief. If little or no flexibility is indicated, bidders should be marked down for not meeting the requirements.

In evaluating design proposals, do not concentrate exclusively on the 'end product' – the plan and elevations showing the proposed development. Explore the quality and depth of analysis, which should not be so lengthy as to be incomprehensible. A bidder should show clear stages in the thought process, preferably moving down in scales.

A danger sign is where there is an apparent jump from rough analysis to a 'polished' design solution. Ask the question, 'how well argued is this submission?'; 'does it convince me these bidders know what they are talking about?'; 'and is there a clear logic to what is being proposed?'

## Resources

Building for Life  
([www.buildingforlife.org](http://www.buildingforlife.org))

The Code for Sustainable Homes: Setting the standard in sustainability for new homes, Communities and Local Government Publications, 2008  
([tinyurl.com/25qz4o](http://tinyurl.com/25qz4o))

Design Quality Indicator (DQI)  
([www.dqi.org.uk](http://www.dqi.org.uk))

OGC Gateway, Process Review 2: Office of Government Commerce, 2007  
([tinyurl.com/dnycmf](http://tinyurl.com/dnycmf))

Commissioning a sustainable and well designed city: a guide to competitive selection of architects and urban designers, GLA and Urbanism Unit, 2005  
([tinyurl.com/d9ggp7](http://tinyurl.com/d9ggp7))

Homes and Communities Agency, Design and quality standards, 2008  
([tinyurl.com/cb6d5f](http://tinyurl.com/cb6d5f))

English Partnerships' Quality Standards: Delivering Quality Places, English Partnerships, 2007  
([www.englishpartnerships.co.uk/qualitystandards](http://www.englishpartnerships.co.uk/qualitystandards))

Design and Quality Strategy, Housing Corporation, 2007  
([tinyurl.com/d6kp7f](http://tinyurl.com/d6kp7f))

This client briefing provides advice on procurement strategies for development programmes and major areas of change, outlining the issues that need to be considered over wide scales and in the longer term. It is aimed at local authority officers and members and their equivalents in development and regeneration agencies.

**CABE**  
1 Kemble Street  
London WC2B 4AN  
T 020 7070 6700  
F 020 7070 6777  
E [enquiries@cabe.org.uk](mailto:enquiries@cabe.org.uk)  
[www.cabe.org.uk](http://www.cabe.org.uk)

CABE is the government's advisor on architecture, urban design and public space. As a public body, we encourage policymakers to create places that work for people. We help local planners apply national design policy and advise developers and architects, persuading them to put people's needs first. We show public sector clients how to commission projects that meet the needs of their users. And we seek to inspire the public to demand more from their buildings and spaces. Advising, influencing and inspiring, we work to create well-designed, welcoming places.

Published in 2009 by the Commission for Architecture and the Built Environment

Graphic design by Draught Associates.

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, copied or transmitted without the prior written consent of the publisher except that the material may be photocopied for non-commercial purposes without permission from the publisher. This document is available in alternative formats on request from the publisher.

## Creating successful masterplans: client briefing supplements

This briefing offers best practice guidance to supplement *Creating successful masterplans: a guide for clients*. It builds on CABE's experience of supporting public sector clients on major projects across the country. It is intended to offer practical advice to those tasked with delivering high quality housing growth and regeneration.

