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1. INTRODUCTION

1.1 Introduction & Purpose

This Descriptive Document (DD) is a supporting document for the Birmingham Ladywood Estate – Ladywood Broad Street Partners procurement process. It provides information on the site context and Birmingham City Council's (BCC) aspirations and requirements for the development opportunity.

The regeneration of the Ladywood Estate will be brought forward as two distinct areas; Ladywood Broad Street (Area 1) and Ladywood Central (Area 2). This approach responds to the different housing markets and contexts in which the regeneration will come forward.

This document should be read in conjunction with the Invitation to Participate in Dialogue (IPD).

2. SITE CONTEXT

2.1 Overview

The Ladywood Estate is located in the City Centre and a short walk from the major commercial and business tourist areas of Westside and the City Centre City. The area is also adjacent to the Great Icknield housing growth area and the historic Jewellery Quarter. Appendix A shows the extent of the Estate and its location.

The Ladywood Estate is primarily residential in character, though there are some commercial uses on sites which were not developed as part of the Council's 1960s housing development. Within the estate there are 3 primary schools but no secondary school, though there is an aspiration to provide a secondary school somewhere within the area to be partly funded by section 106 contributions from Icknield Port Loop. There are also two small shopping parades, both located on the periphery of the estate, and a community centre. Though the area is well served by public transport along the Ladywood Middleway and Summer Hill Road, there are no bus services which actually run within the estate. The incidence of crime, particularly crime against the person, is high, and many of the health indicators for the local population are worse than the Birmingham average.

2.2 Strategic Overview

Birmingham has an ambitious growth agenda to deliver the homes, jobs and infrastructure to support its growing, dynamic and diverse population. By 2031 the city's population will have grown by 15% and billions of pounds of infrastructure investment including High Speed 2 will have been delivered. The city council is leading the implementation of this major growth strategy which includes transformation of the City Centre. In delivering this growth agenda the City Council is committed to achieving inclusive and sustainable development. This includes ensuring that Birmingham is

- **a great city to live in:** This scheme will provide a significant quantum of new homes and create a new aspirational neighbourhood.
- **an entrepreneurial city to learn and work and invest:** activity within the construction sector will create jobs and apprenticeships in the city. Activity in the supply chain industries, will support the local economy through the Birmingham Business Charter for Social Responsibility.
- **an aspirational city to grow up in:** new homes will be developed which will provide a safe, warm, sustainable and connected neighbourhood in which our children can thrive.
- **a fulfilling city to age well in:** the links between health and housing are well recognized. New thermally efficient, economical to run new homes which are designed to high standards of quality and internal space standards will be more affordable for residents and will offer a higher quality of life leading to better health outcomes.

3. PLANNING CONTEXT

3.1 The Big City Plan (2011) identifies Ladywood as a “housing estate of variable quality” with issues of “poor design and layout, under-utilised open spaces and poor pedestrian routes”. As the strategic masterplan for the City Centre the BCP sets out a vision for Ladywood to become home of new family living with well-balanced infrastructure, including private and communal open spaces, improved network of local walking routes and community facilities. It recognises that successful development will rely on the creation of a range of local facilities and amenities accompanied by new public spaces and recreational areas will be central to creating a well-connected desirable place to live. As part of the overall strategic approach to land use the BCP envisages the area becoming a higher density residential area.

The Birmingham Development Plan provides statutory policies for the whole of the city which seek to deliver the growth agenda to meet needs of the growing population including homes, jobs and infrastructure. The BDP identifies Ladywood as an area that should become a vibrant mixed use area combining the visitor, cultural, commercial and residential offer into a dynamic well connected area, which supports development in the Greater Icknield Growth area.

Further to this the BDP identifies the importance of Housing regeneration and the renewal of existing housing areas to ensure high quality accommodation and environment areas are provided. This aligns with the overall aim of the BDP to develop Birmingham as a City of sustainable neighbourhoods that are safe, diverse and inclusive. The BDP has a strong focus on creating high quality development with an emphasis on place making.

The opportunities for estate renewal are identified in the relevant policy along with provisions for other areas to come forward over the plan period with a proactive approach between the Council, delivery partners and local residents being promoted.

The City council has established strategic policies to bring forward estate renewal and regeneration across the City with the Ladywood area recognised as a location for major change.

The Birmingham Development Plan (BDP) adopted in 2017 together with ‘saved’ policies within the Birmingham Unitary Development Plan (BUDP) adopted in 2005 comprises the statutory ‘Development Plan’ against which planning applications are determined. The ‘saved’ policies will remain in place until replaced by policies in the new Development Management Policies Development Plan Document (DPD).

The Big City Plan (2011) is a non-statutory masterplan for the future development of Birmingham City Centre.

4. VISION AND OBJECTIVES

4.1 The development of Birmingham Ladywood will transform the residential offer in the City Centre. It creates the opportunity to deliver a new high quality aspirational residential neighbourhood on the doorstep of the city centre core. As an exemplar sustainable development it can make use of existing resources such as the canal and provide radically improved connectivity to the surrounding area. The future redevelopment will need to achieve 1 for 1 replacement of social housing and reinvestment in public open space. Building on the principles established in the BDP and Big City Plan the City Council have set out an overarching vision for the regeneration of Ladywood Estate:

- Create a family focused neighbourhood delivering the next generation in city centre living set within a high quality environment, connected by a well-designed network of streets and public spaces and supported by local amenities and facilities.

This vision will be delivered through a series of objectives which will be integral to meeting the ambition to transform this part of the City Centre including –

- To secure high quality, sustainable homes as part of a well-designed neighbourhood;

- To provide a safe and attractive network of connected public open spaces and pedestrian routes;
- To create a complementary mix of commercial and other uses to support a vibrant active neighbourhood.

4.2 Proposed Development Opportunity (Red-Line) Area

The Ladywood Estate, attached as Appendix A, and delineated by a solid red-line, extends to 62.10 hectares overall, and includes 33 hectares of council-owned land. Ladywood Broad Street is identified as Area 1 (1.55ha). In particular, it is anticipated that the eventual contract will allow for adjacent sites to be developed under the provisions of the contract by agreement of the joint venture partners. The opportunity area has been divided into two areas, reflecting the fact that these are two distinct areas, each with their own characteristics. It is envisaged that more than one partner will be engaged to work with the Council on these areas, as some areas will be more suitable for example for high density housing than family housing, and it is unlikely that a single partner could be identified who could handle the full range of housing development that will be required across this large site.

5. THE PARTNER(S) ROLE

The Council is seeking experienced Development / Investment Partner(s), to deliver the development of Ladywood Broad Street including provision of infrastructure and public realm works, as part of the regeneration of the City Centre.

The responsibilities of the Partner(s) once selected will include, but not be limited to:

- Creating a comprehensive project team to meet the objectives of the development and to integrate with the Council's project team;
- Creating a comprehensive masterplan for the site in collaboration with the local community and other key stakeholders
- Bring forward detailed designs of the development; manage the site assembly for the scheme, including the rehousing of residents if necessary , with statutory support from the local authority;
- Development of a planning strategy and implementation of that strategy in order to achieve a satisfactory planning consent for the Development;
- Pursuing a development that is viable, fundable and commercially deliverable;
- The development and implementation of a strategy for the assembly of land interests necessary for the development;
- Securing the necessary funding to deliver the Development, both prior and post satisfaction of any development conditions;
- Undertaking all necessary and appropriate communication and consultation with persons interested in the development, in accordance with a communications plan agreed with the Council;
- Contribute towards the Council's professional and administrative costs in connection with the development;
- Commission, undertake, manage and complete the development;
- Define and implement a strategy for the continued economic use of the site prior to the implementation of the development;
- Undertake branding, promotion and marketing of the development; and
- Establish future estate management arrangements for the completed development that ensure a legacy is created and the quality is maintained.

This list is not exhaustive and Bidders should refer to the overall requirement as set out in the DD and the IPD and appendices – in particular the draft Heads of Terms. These will be refined during the procurement process.

6. BIRMINGHAM BUSINESS CHARTER FOR SOCIAL RESPONSIBILITY

The Birmingham Business Charter for Social Responsibility (the Charter) is a set of guiding principles which the Council adheres to and invites all organisations to adopt as a mechanism for managing how they deliver social value.

It is a compulsory requirement of Birmingham City Council that all contractors including grant recipients must sign up to the Charter.

All Contractors, subcontractors and grant recipients are required to adhere to the Council's Living Wage Policy, regardless of the contract / grant size.

For further information on the Charter, view: www.finditinbirmingham.com/charter within which are a range of documents, including a guidance document available at:
<https://www.finditinbirmingham.com/Upload/Charter/Charter%20Guidance.pdf>

6.1 Action Plan

At the heart of the Charter process is an action plan. Any organisation wishing to sign up to the Charter needs to complete an action plan. The action plan template can be downloaded from:
www.finditinbirmingham.com/charter

There is further guidance on the first sheet of the action plan about specifics of completing it.

The action plan will be a key topic during the dialogue process and will capture how bidders intend to deliver social value for this specific contract. The Council will work with you to shape your action plan until it is in an acceptable state. Following dialogue it will be submitted as part of the tender response, although for the purpose of tendering, its contents will be split between the four social value project objectives / topics, ref. 13 to 16.

The preferred bidders will become an accredited Charter signatory, receive a certificate and added to the list of Charter signatories on the web site. The action plan needs to be relevant, proportionate, specific and measurable.

The actions contained in an action plan need to be relevant and proportionate to the size of the contract. The social value questions contained in Topics 13 to 16 make it clear which aspects of the Charter are most relevant.

Each action needs to be very specific in terms of exactly what the organisation will do. The action plan template is designed to make the actions measurable. The target date and target volume columns within the action plan are very important.

The Charter action plan is intended to cover the life of the contract. An annual report detailing the progress needs to be submitted. The annual report can be submitted using the same action plan form. The three columns on the right of the action plan capture the quantity and date achieved as well as a final achieved flag. Contracted organisations and grant recipients will hold regular reviews of progress against the plan.

The value of the activities will be greater if they are targeted at areas / groups with the greatest need. The action plan contains a list of Birmingham wards in order of deprivation for guidance. Targeting groups needs to be relevant to the activity and could include homelessness, children in care, care leavers, homeless, elderly, fuel poverty, low income, BME (Black and Minority Ethnic), disabled, LGBT (Lesbian, Gay, Bisexual and Transgender), etc.

6.2 Charter Principles

There are six principle areas under the Charter. For the purpose of this procurement, the Council has determined that four of the principles are very relevant and these are set out in topics 13 to 16.

7. REQUIREMENTS

7.1 Introduction

This section details the Council's minimum requirements & scheme aspirations / considerations for Birmingham Ladywood. It includes an initial paragraph on overall Masterplan considerations, followed by topic specific requirements.

7.2 Masterplan Requirements

Bidders should consider these points when developing their masterplan and provide reasoned justifications during the dialogue period if their proposed approach deviates from this guidance.

- Site Layout & Massing Considerations:
 - The layout of development should reconnect the area and create a coherent scale and pattern of city blocks fitting within a logical and legible network of streets and spaces.
 - Comprehensive approach should be taken to the areas planning to ensure well designed and integrated places are created.
 - Any new developments will need to create safe environments and integrate high quality public realm.
 - Spaces should be integrated into the layout of the scheme, should be enclosed and be a focal point for mixed uses and activity to create natural surveillance.
- Site Heritage Considerations:
 - Recreating the historic street grid throughout the new residential neighbourhood.
 - The important heritage of the area and surrounding area will need to play a central role informing the future approach to design.
- Site Design Considerations:
 - Throughout the site roof space to be utilised for productive uses and amenity space with plant and equipment carefully managed.

Proposed designs must take consideration of existing policy positions along with emerging policies, including the Birmingham Design Guide, Transportation Policy Statement and Economic Policy.

7.3 Detailed Requirements

7.3.1 Residential

Objective

To create an inclusive and sustainable residential neighbourhood that provides a mix of good quality private and affordable residential units within an attractive setting, supported by local amenities and services. The development should be integrated with and connected to its surroundings.

7.3.2 Tender Question/Request for Information

Provide your proposed approach to the creation of a new residential neighbourhood. In order to support the response, please provide:

- Overall vision and philosophy for the creation of a regenerated residential neighbourhood and community, supporting modern living and contributing towards a distinctive sense of place with access to appropriate supporting facilities.
- Proposed quantum and type of development – residential and supporting uses, supported by market research and examples of comparable schemes.
- Proposed approach to design of the residential units and supporting uses.
- Proposed approach to amenity space.
- Outline strategy for the residential offer of a quality, scale and critical mass appropriate for Birmingham city centre and how it will help to meet housing need in the city.
- Proposed quantum of new homes on the site together with indicative densities across the site.
- Location of proposed densities and uses on a plan.
- Supporting rationale for proposed densities and form of development, including any baseline data, market demand, trends, catchment, etc.
- Proposed approach to car parking, including commentary on consistency with the city's transport/access strategy for the area.
- How the community would be meaningfully engaged in design and development.
- Any rehousing and reprovion process would be managed to allow all existing residents the right to return to the area to support the existing community.
- How the reprovion of social housing would be prioritised as part of the regeneration process, to ensure that areas of highest housing need would be addressed early.

7.3.3 Further Guidance / BCC Requirements

The following items provide further guidance on this topic in terms of BCC's aspirations for the scheme. The Bidder will need to consider these aspirations / considerations as part of formulating their solution for this aspect of the scheme and in relation to their response to the tender question / request for information.

7.3.4 Scheme Aspirations / Considerations:

- There is a requirement for 35% affordable housing across the site as a whole (Areas 1 and 2), with one for one replacement of any Council homes which may be demolished as a result of the regeneration. In the event of any impact on existing residents, it will be a requirement that all existing residents are given the offer to return to the area.
- Mix of Tenure and Type:
 - The approach should be in line with the policies of the Birmingham Development Plan and emerging Birmingham Design Guide.
 - Appropriate space for storage, bicycles, waste and recycling should all be integrated into the design.
- Car Parking
 - Car parking provision should be consistent with the City's transport / access strategy for the area
- Amenity Space:
 - Provision of appropriate private, shared private and public amenity space to cater for the needs of individuals and the wider community.
 - Provision of green space, including a new linear park as a focal point for the residential neighbourhood and the wider community.
 - Provision of an appropriate range of amenities, such as play areas, allotments and habitats benefiting the site and the wider area.

7.4 Complementary Uses

7.4.1 The provision of complementary ancillary uses to enhance activity throughout the day and into the evening; support the primary residential use whilst being consistent with a high quality sustainable city centre development.

7.4.2 Tender Question / Request for Information

Provide your proposed approach to the inclusion of complementary ancillary uses. In order to support the response, please provide:

- Outline strategy for the provision of ancillary uses to complement the residential use whilst also complementing the existing city core offer.
- Proposed quantum and location of proposed uses identified on a plan including supporting rationale / market evidence for quantum and type of uses.

7.4.3 Further Guidance / BCC Requirements

The following items provide further guidance on this topic in terms of BCC's aspirations for the scheme. The Bidder will need to consider these aspirations / considerations as part of formulating their solution for this aspect of the scheme and in relation to their response to the tender question / request for information.

7.4.4 Scheme Aspirations / Considerations

Retail, Food and Beverage uses should complement the residential neighbourhood and be of a scale and use relevant to the area and the existing city core offer. These uses should be utilised to create active frontages along with other forms of business, community and/or leisure space

7.5 Public Realm

7.5.1 Objective

The provision of attractive and innovative high quality public realm to encourage people to live and work in the city.

To incorporate public art (temporary and permanent) within the public realm / street scape that reflects the history and future of the area and to help create a sense of community.

7.5.2 Public Realm – critical success factors

Public realm is a critical success factor for Ladywood. Currently the neighbourhood lacks any identity or heart, and a successful regeneration needs to address this issue. The critical success factors are –

- Creation of high quality public realm and public/private spaces to support the delivery of a sustainable residential development

7.5.3 Tender Question / Request for Information

Provide your proposed approach to the creation and treatment of public realm. In order to support the response, please provide:

- A plan or plans showing the proposed extent of public realm, including public/private space with clear delineation between the types of space
- Examples of the types of treatments and materials proposed for the public realm
- An outline public art strategy

7.5.4 Further Guidance / BCC Requirements

The following items provide further guidance on this topic in terms of BCC's aspirations for the scheme. The Bidder will need to consider these aspirations / considerations as part of formulating their solution for this aspect of the scheme and in relation to their response to the tender question / request for information.

7.5.5 Scheme Aspirations / Considerations: Public Realm Generally

- Design:
 - A distinctive, high quality, coherent and appropriate palette of materials should be used on public realm throughout the site .
- Greening:
 - Green infrastructure should feature as an integral and highly important part of the site through the use of green walls, green and brown roofs and the provision of habitat features.
- Management & Maintenance:
 - Longer term management and maintenance provisions should be fully considered, including the resilience of materials and equipment.
 - Seek to standardise materials across the public realm (consider materials used elsewhere in the City Centre) to reduce maintenance costs and assist in maintenance regimes.
 - Active space will require a management plan that should include allocation of time for the City Council/local communities to utilise the space.

7.6 Public Art

- Strategy
 - set out a strategy and implementation plan for the delivery of temporary and permanent art works within the public realm/street scape and create an approach that integrates public art within the design of buildings, streets and spaces
 - Artists/art organisations must be engaged and involved in formulating the strategy for the site.
 - The artist brief and their outputs should respond to the history and future of the site.
 - There should be a mixture of integrated artworks in the public realm and new building designs including street art and a programme of events and activities.
- Maintenance:
 - A decommissioning and maintenance plan must be approved for each piece of art work.

7.7 Transport, Linkages & Connectivity

7.7.1 Objective

To connect the site to the wider city and improve permeability and pedestrian flows. To achieve connectivity to the wider area.

To deliver an environmentally sustainable approach to transport, including encouraging cycle usage and walking and reducing reliance on car usage.

7.7.2 Critical success factors –

- Car use – creation of an environment in which reliance on the car is reduced.
- Cycling and walking – promoting walking and cycling including providing routes which are safe to use and subject to overlooking from adjacent buildings;
- Linkages – creation of strong pedestrian connections to the wider area;

7.7.3 Tender Question / Request for Information

Provide your proposed approach to transport, linkages and connectivity across the site. In order to support

the response, please provide:

- Outline strategy for transport, linkages and connectivity.
- A plan or plans showing the proposed routes, key linkages and connections, including any supporting infrastructure, facilities, etc.
- Proposed approach to reducing reliance on car usage, along with proposed quantum of car parking.
- Proposed approach to servicing the various uses across the site.
- How you propose to achieve linkages to adjacent neighbourhoods;

7.7.4 Further Guidance / BCC Requirements

The following items provide further guidance on this topic in terms of BCC's aspirations for the scheme. The Bidder will need to consider these aspirations / considerations as part of formulating their solution for this aspect of the scheme and in relation to their response to the tender question / request for information.

7.7.5 Scheme Aspirations / Considerations: Transport and Connectivity

- Pedestrian & Cycle Linkages:
 - Provide pedestrian networks improving access to surrounding areas encouraging walking and cycling. Routes to incorporate trees and other natural features.
 - Integrated cycling infrastructure connecting into the city's wider cycle network.
 - Cycle parking should be integrated as part of the development, for underground storage and services.
- Legibility:
 - Bus stops, road materials and signage will all need to be carefully designed to integrate into the overall vision for the site.
- Accessibility and Parking:
 - Vehicle access will be required for disabled users, taxis and servicing, whilst private car access within the site is carefully managed.
 - Private car access should be designed to not conflict with pedestrian and cycle movement and the emphasis on the quality of the environment. Innovative approach to provision for the car, with an appropriate level of parking for the proposed uses, taking into consideration the objective to reduce reliance on cars, situated on the edge of the site.
 - Servicing arrangements for the uses on the site should be appropriate and integrated from the outset.

7.8 Highways

- Safety:
 - Safety of the public and those working on the development must be the primary consideration when determining all aspects of design, construction and operation.
- Maintainability:
 - Minimise maintenance requirements; seek to standardise materials across City Centre public realm to assist in maintenance regimes.
 - Minimise maintenance costs and ensure where required suitable funding is allocated from developers or BCC corporate resources to fully-fund any residual highway maintenance obligations.
- Enforceability:
 - Recognise that any future expectations regarding highway or parking enforcement are a design consideration.
- Network Resilience:
 - Ensure that actions and works do not prejudice alternative traffic routes for either future schemes/initiatives or the operation of the highway network during incidents.

7.9 Partnering Approach

7.9.1 Objective

To create a partnering structure with the Council that: aligns the parties' goals; plays to their strengths; appropriately apportions risks and provides sufficient control for each party to determine those aspects of the development that are core to their respective organisations.

7.9.2 Tender Question / Request for Information

Provide your proposed partnering approach. In order to support the response, please provide:

- A written explanation, including diagrams if helpful, to describe how the partnering arrangements would operate through all phases of the development (pre-development, development and operation).
- Governance arrangements, both management and operational.
- Development risk apportionment – summary of where typical development risk resides.
- Parties' roles and responsibilities.
- Contracting / sub-contracting arrangements for third party suppliers.
- Potential tax implications of the approach.

7.9.3 Further Guidance / BCC Requirements

The following items provide further guidance on this topic in terms of BCC's aspirations for the scheme. The Bidder will need to consider these aspirations / considerations as part of formulating their solution for this aspect of the scheme and in relation to their response to the tender question / request for information.

7.9.4 Scheme Aspirations / Considerations:

Overall Approach

- The Council are looking for partners, with aligned goals and objectives and whose expertise will complement the Council's, to bring forward the development on a partnering basis.

7.9.5 Council control / influence:

- The Council require approval rights over:
 - The Business Plan;
 - The Masterplan
 - Temporary Use Management Plan.
- The Council requires an equal or greater say on:
 - The residential offer to ensure it meets the City's aspirations;
 - Community engagement and involvement;
 - Public realm;

7.9.6 Governance Structure:

- Provision of a governance structure that allows for an appropriate extent of involvement and influence by resources from the parties. Governance arrangements should set out formal (pre-planned meetings, etc.) and informal points of interaction.

7.10 Delivery & Resources

7.10.1 Objective

The timely delivery of the scheme, with appropriate and sufficient resources.

7.10.2 Tender Question / Request for Information

Provide your proposed approach for the timely delivery of the scheme. In order to support the response, please provide:

- Overall approach to delivery in the context of this being a significant city centre site with highways and infrastructure work that will impact areas outside of the site itself.
- A detailed gantt chart for the preferred bidder stage and a high level gantt chart for the period from contract award through to commencement of the first phase of the development.
- An overall phasing plan for your proposed concept.
- Proposed approach/strategy for land assembly, if applicable.
- Proposed approach to consultation with key stakeholders including community engagement and any lessons learnt and/or examples of where the approach has been successfully deployed elsewhere. Include reference on how you intend to engage and involve young people in the formulation of the scheme.
- Proposed resources – structure, key individuals and organisations for the pre-development and development phases.
- Confirmation of extent of activities and financial commitment for the preferred bidder stage.

7.10.3 Further Guidance / BCC Requirements

The following items provide further guidance on this topic in terms of BCC's aspirations for the scheme. The Bidder will need to consider these aspirations / considerations as part of formulating their solution for this aspect of the scheme and in relation to their response to the tender question / request for information.

7.10.4 Scheme Aspirations / Considerations:

- Highways:
 - Highways work will require an appropriate planned, logical construction delivery programme, co-ordinated with other key schemes and projects within the City Centre.
- Preferred Bidder Stage
 - It is anticipated that the preferred bidder will prepare the following during the preferred bidder stage:
 - Detailed Masterplan, based on the concept Masterplan submitted at the final tender stage;
 - Detailed engagement plan with the local community for the development of the masterplan
 - Full Business Plan, based on the Masterplan and overall approach as set out in their final tender;
 - Completed partnering / contract documents
- Phasing
 - Early delivery of enabling works, such as key pedestrian routes, public spaces and other infrastructure to create a sense of place and community.
- Community Engagement
 - The approach needs to demonstrate a strategy toward engaging, involving and spreading the benefits of the scheme in an inclusive way so that those parts of the city that haven't historically been engaged/benefited from economic growth are able to.
- Neighbouring landowners/major organisations
 - The Council will expect the partners to work with neighbouring landowners/major organisations to ensure the scheme integrates with surrounding activity and opportunities to maximise accessibility and interaction.

7.10.5 Long Term Structure

7.10.6 Objective

The provision of a long term management and maintenance structure over the completed scheme in order to maintain the environment as an attractive place to live, work and visit, where people feel safe and secure, at minimal cost and risk to the public sector.

7.10.7 Tender Question / Request for Information

Provide your proposed approach to the long term operational structure for the scheme. In order to support the response, please provide:

- How you intend to provide a long-term legacy for the city and people of Birmingham.
- Proposed management and ownership structure(s).
- Proposed approach to the management and maintenance of the public realm.
- Funding of the long term structure and maintenance of the overall assets.

7.10.8 Further Guidance / BCC Requirements

The following items provide further guidance on this topic in terms of BCC's aspirations for the scheme. The Bidder will need to consider these aspirations / considerations as part of formulating their solution for this aspect of the scheme and in relation to their response to the tender question / request for information.

7.10.9 Scheme Aspirations / Considerations:

- Creating a long term legacy
 - The scheme has the potential to create a long term legacy for the people of Birmingham and the rejuvenation of the city as a whole.
- Estate Management
 - Servicing and Deliveries - Must minimise the level of servicing and delivery traffic to the site, particularly in order to meet the 'Clean Air' zone requirements.
 - Security - Must ensure that the development is kept safe and minimise potential risks to the general public
- General Public - Management of the site must ensure that the general public are treated with integrity, dignity and supports Birmingham City Council's Core Value of putting Citizens First i.e:
 - Actively connect with citizens to understand their different needs and aspirations
 - Listen to everyone, showing I respect and value their input
 - Prioritising citizen needs, helping whenever I can
 - Building collaborative relationships and work with others to deliver joint outcomes
- Funding:
 - Funding will be allocated for maintaining artworks for a minimum of a ten year period to be included in the commissioning fund.
 - The scheme must establish a financially sustainable structure that will be responsible for the management and maintenance of public realm, without the need for financial contributions by the Council.

7.11 Smart Cities

7.11.1 Objective

To incorporate digital and smart technology within the scheme to create a better place that improves wellbeing, mobility, equality, communities and prosperity. To future proof buildings, infrastructure and technology.

7.11.2 Tender Question / Request for Information

Provide your proposed approach for the inclusion of Smart City initiatives within the scheme. In order to support the response, please provide:

- Initial thoughts on what Smart City initiatives should be included within the scheme along with commentary on appropriateness and affordability.
- How your proposed initiatives will improve wellbeing, mobility, equality, communities and prosperity;
- How you intend to future proof Birmingham Ladywood.

7.11.3 Further Guidance / BCC Requirements

The following items provide further guidance on this topic in terms of BCC's aspirations for the scheme. The Bidder will need to consider these aspirations / considerations as part of formulating their solution for this aspect of the scheme and in relation to their response to the tender question / request for information.

7.11.4 Scheme Aspirations / Considerations: Overview

Smart cities initiatives within Birmingham Ladywood should:

- Pioneer the use of smart city technologies and principles, supporting the City Council in delivering services more effectively in line with the Birmingham Smart City Roadmap
- Support local innovation, education and enterprise through partnership working with local businesses, residents and institutions.

7.11.5 Key Components:

- Delivering an exemplar development – Birmingham Ladywood will be a flagship development with the potential to demonstrate the public and commercial benefits of the innovative use of technology.
- Investing in innovation – Implementing the scheme in partnership with Birmingham organisations, supporting the local digital economy.
- The Birmingham Ladywood Digital Masterplan will be utilised throughout the lifetime of the scheme as a design and consultation tool. The design process for all developments should include testing and analysis within the Digital Masterplan model, which will be continuously updated as designs are finalised.
- Digital modelling tools including BIM should be employed to facilitate efficient design and construction, and to predict the impacts of developments, for example traffic, air quality and noise.
- Development should be provided with wired and wireless connectivity both within buildings and externally in open spaces, to the highest standards of current bandwidth, with the capacity to expand to foreseeable growth and using open approaches to enable competition in provision.
- Buildings should employ digital technologies as a part of achieving high standards of sustainability and also to provide a better user/resident experience.
- Public realm, open spaces, and street based assets should incorporate provision for digital infrastructure and information and communications technologies.
- Regular review – Ensuring that digital aspects of the scheme take advantage of technological progress, keeping Ladywood innovative throughout the life of the project.

7.12 Birmingham First

7.12.1 Objective

To provide positive social, environmental and economic impacts on the wider Birmingham through buying locally.

7.12.2 Tender Question / Request for Information

Provide your proposed approach to buying locally in the form of the Action Plan, along with any supporting narrative. See relevant section of the Descriptive Document for context on the Action Plan. In order to support the response, please provide:

- Actions / initiatives that you propose to undertake to contribute towards this topic and how these will be ultimately measured and reported against.
- Any targets in terms of volume and or dates.

7.12.3 Further Guidance / BCC Requirements

The following provides further guidance on this topic in terms of BCC's aspirations for the scheme. The Bidder will need to consider these aspirations as part of formulating their solution for this aspect of the scheme and in relation to their response to the tender question / request for information.

7.12.4 Scheme Aspirations / Considerations:

Buy Birmingham First is captured in the Charter principle 'Buy Local'. Charter signatories will take account of the social, environmental and economic impacts of buying locally when commissioning and contracting, thereby reducing unemployment and raising the skill level of the local workforce.

Key initiatives could potentially include:

- Support the local economy by choosing suppliers close to the point of service delivery where possible.
- Use Finditinbirmingham as the primary method of sourcing suppliers for contracts in Birmingham, increasing the accessibility of opportunities to local businesses throughout the supply chain.
- Encourage their suppliers to endorse the principle of Buy Local throughout their supply chains.
- Where possible, commit to purchasing from businesses on the Finditinbirmingham website and from social enterprises and small businesses.

The Buy Local measures within the Charter are:

- What % of your spend will be with suppliers within 30 miles of the point of service delivery
- How many procurement opportunities will you advertise on Finditinbirmingham over the next 12 months, via: www.finditinbirmingham.com
- What % of your suppliers will be registered on Finditinbirmingham?
- What % of your total spend will you post on Finditinbirmingham?
- What % of your total spend will be with SMEs (Less than 250 employees)
- What % of your total spend will be with the 3rd sector (Social Enterprises, Charities, etc.)

Finditinbirmingham is the Council's primary procurement portal. Registering on and advertising procurement opportunities on Finditinbirmingham will ensure that these opportunities will be available to local businesses.

Finditinbirmingham also runs monthly breakfast events to ensure that local businesses are exposed to main contractors. Further activity could include attending, having an exhibitor stand or sponsoring the monthly events. Measuring the local / SME / Social Enterprise spend is an important step towards effective management of this principle.

“Local” is context dependent, however, as guidance, 30 miles from the point of delivery is considered reasonable.

7.13 Local Employment

7.13.1 Objective

To create training and employment pathway opportunities for local residents throughout the delivery of the project, targeting areas of high unemployment and groups facing disadvantage and supporting schools, colleges and universities to ensure that the economic growth is delivered in an inclusive way benefiting the wider Birmingham population.

7.13.2 Tender Question / Request for Information

Provide your proposed approach to local employment in the form of the Action Plan, along with any supporting narrative. See relevant section of the Descriptive Document for context on the Action Plan. In order to support the response, please provide:

- Actions / initiatives that you propose to undertake to contribute towards this topic and how these will be ultimately measured and reported against.
- Any targets in terms of volume and or dates.

7.13.3 Further Guidance / BCC Requirements

The following provides further guidance on this topic in terms of BCC's aspirations for the scheme. The Bidder will need to consider these aspirations as part of formulating their solution for this aspect of the scheme and in relation to their response to the tender question / request for information.

7.13.4 Scheme Aspirations / Considerations:

Charter signatories create employment and training opportunities for local people especially in target areas.

Key initiatives could potentially include:

- Commit to create employment and training opportunities for local residents, targeting areas of high unemployment and groups facing disadvantage, including people with disabilities through activities such as work experience placements, apprenticeships, internship and mentoring.
- Seek opportunities to work with schools and colleges to help to ensure that the local young people are equipped with the right skills to match the requirements of the labour market.
- Advertise employment opportunities through the Employment & Skills Services at the Council to ensure that those opportunities are targeted at those furthest from the job market.

The Local employment measures within the Charter are:

- How many new jobs (Full Time Equivalent) will you create?
- How many Apprentices will you support?
- How many Intern placements will you create?
- How many work placement hours will you provide?
- How many hours of voluntary work hours will you provide?
- How many people will you support back to work with Coaching, mentoring, CV writing, mock interviews etc...?
- How many people will you support into employment who face challenges, e.g. ex-offenders, disabled, etc...?
- How many opportunities will you advertise with Birmingham City Council's Employment and Skills Services:
 - What % of your staff live within 10 miles of where the service is being delivered?
 - What % of your staff live within 30 miles of where the service is being delivered?

The Employment and Skills Services (eateam@birmingham.gov.uk) at the Council are available to assist Charter signatories in a number of ways including:

- Providing guidance on recruitment and how to target the most disadvantaged groups
- Provide support in recruitment and training
- Provide support in offering apprenticeship

The last sheet of the Charter action plan provides a list of wards in Birmingham in order of deprivation. This is a useful guide when targeting employment.

“Local” is context dependent, however, as guidance, 30 miles from the point of delivery is considered reasonable.

7.14 Partners in Communities

7.14.1 Objective

To build capacity by supporting community organisations with resources and expertise in areas of the city with the greatest need. To improve and sustain local facilities with a particular focus on Arts and Cultural facilities across the city.

7.14.2 Tender Question / Request for Information

Provide your proposed approach to Partners in Communities in the form of the Action Plan, along with any supporting narrative. See relevant section of the Descriptive Document for context on the Action Plan. In order to support the response, please provide:

- Actions / initiatives that you propose to undertake to contribute towards this topic and how these will be ultimately measured and reported against, including specific reference on improving and sustaining local facilities
- Any targets in terms of volume and or dates.

7.14.3 Further Guidance / BCC Requirements

The following provides further guidance on this topic in terms of BCC's aspirations for the scheme. The Bidder will need to consider these aspirations as part of formulating their solution for this aspect of the scheme and in relation to their response to the tender question / request for information.

7.14.4 Scheme Aspirations / Considerations:

Charter signatories will play an active role in the local community and support organisations, especially in those areas and communities with the greatest need.

Key initiatives could potentially include:

- Build capacity by supporting community organisations with resources and expertise in areas with the greatest need, for example mentoring and working with youth organisations and services.
- Make a local impact by improving local facilities and areas, for example staff volunteering schemes.
- Provide support to third sector organisations and work with third sector organisations to deliver services and contracts.
- Have a shared sense of responsibility; consider good citizenship and safeguarding issues relating to children and vulnerable adults.
- Work with schools and colleges, offering work experience and business awareness to students, especially those from disadvantaged areas or communities.
- Make accessible all sub-contracting opportunities to a diverse supply base including the third sector and local suppliers and provide mentoring and support to assist these organisations to tender for and deliver these supply opportunities where necessary.
- Help to support the health and wellbeing of communities in which the business operates by for example linking with local schools and colleges, other local businesses and residents' groups to help run or sponsor activities / events, which will directly benefit those living there.

The Partners in Communities measures within the Charter are:

- Paid voluntary time given for staff to do community work (hours, days, number of staff, etc)
- How many schools will you support through, becoming a governor, reading, mentoring, Career advice, CV writing, etc. Edsi.enquiries@birmingham.gov.uk
- Hours of paid voluntary time given by Staff
- What is the value of donations raised / given to Charities?
- What is the value of spend with Social Enterprises?
- Number of disadvantage individuals supported
- Number of community organisations supported

- Number of community projects supported

Working in communities is best done through third sector organisations. This is because they usually have good reach in the communities and delivering through them strengthens their infrastructure and creates added value. Access to contacts in these organisations can be obtained from the Council.

7.15 Green & Sustainable

7.15.1 Objective

The provision of an environmentally sustainable development that creates an holistic approach to design, development and occupational stages of the scheme.

7.15.2 Tender Question / Request for Information

Provide your proposed approach to Green & Sustainable (Environmental Sustainability) in the form of the Action Plan, along with any supporting narrative. See paragraph 5 of the Descriptive Document for context on the Action Plan. In order to support the response, please provide:

- Actions / initiatives that you propose to undertake to contribute towards this topic in the design, development and occupational stages and how these will be ultimately measured and reported against.
- Any targets in terms of volume and or dates.
- Any feasibility or viability assumptions

7.15.3 Further Guidance / BCC Requirements

The following provides further guidance on this topic in terms of BCC's aspirations for the scheme. The Bidder will need to consider these aspirations as part of formulating their solution for this aspect of the scheme and in relation to their response to the tender question / request for information.

7.15.4 Scheme Aspirations / Considerations:

Charter signatories will commit to protecting the environment, minimising waste and energy consumption, using resources efficiently and contributing towards Birmingham's Clean Air Zone. These commitments will also apply to their supply chain.

Key initiatives could potentially include:

- Reduce Carbon footprint – be aware of main impacts on carbon emissions including the indirect carbon used in manufacturing processes and the direct impact of operations and logistics.
- Measure carbon emissions and ensure a plan to reduce emissions, where possible, is being implemented using carbon measurement tools. Specific targets to be included in major contracts.
- Eliminate unnecessary waste by adopting the "reduce, reuse, recycle" philosophy.
- Be a good neighbour, minimise negative local impacts (noise, air quality), improve green areas (e.g. biodiversity, visual attractiveness).
- Protect the environment and minimise adverse impacts and instil this approach throughout the supply chain. The Green and sustainable measures in the Charter are:
- CO2 reduction target in % or in tonnes
- Waste reduction target in %
- Waste to Landfill reduction %
- Electricity reduction %
- Gas reduction %
- % of renewable energy used
- Water consumption reduction %
- Number of individuals in Fuel poverty assisted with energy efficiency measures
- Environmental Management System (e.g. ISO14001) Introduced or maintained
- Implement a Carbon Management / Environmental Policy to reduce impact of CO2. Using conversion tables¹, most activities can be converted to tonnes of CO2 saved. Further information on local policy initiatives can be provided by the Council.

Specific potential green and sustainable aspirations for Birmingham Ladywood include:

- Target Standards:
 - Residential buildings should target Home Quality Mark Standard of 4 and 5 stars.
 - Commercial buildings should target BREEAM excellent or outstanding or equivalent.
- Reduced Energy Demand:
 - Consider use of Smart Grids to balance energy generation and demand.
- Low Carbon Energy Supply:
 - The scheme should utilise options for low carbon energy supply and harness opportunities for generation of energy.
- Increased Resource Efficiency:
 - Water management strategy should identify options for the efficient management of water, including waste water and portable water.

<https://www.gov.uk/government/collections/government-conversion-factors-for-company-reporting#conversion-factors-2016>

- Maximising the use of sustainable drainage systems should be considered as part of the overall development, including impact from / on surrounding areas.
- The development should seek to maximise the use of building materials from sustainable resources.
- The development should seek to design out construction waste and seek to achieve a 100% recycling rate.
- A full embedded carbon assessment of the development will need to be undertaken.
- Full Integration of Natural Capital and Green Space:
 - The development should seek to integrate Natural Capital into the development from the outset.
 - Green infrastructure should feature as an integrated part of the site.
 - Productive landscape should form part of the residential neighbourhood.
 - Green Streets should be created through the integration of trees and other features.
- Potential for Showcasing Environmentally Sustainable Technology:
 - Consider delivering one building to the Living Building Challenge and used to showcase technology within the site.
- Supporting of Local Economy:
 - Materials for construction should be, where possible, drawn from the local economy, with a target of 10% of materials from a 50 mile radius of the Greater Birmingham area.
- Promote Low Carbon Connectivity:
 - Seek to prioritise low carbon means of connectivity through cycling and walking, including, for example, a bike share scheme.
 - Seek to provide infrastructure for ultra-low emission vehicles.

7.16 Viability & Funding

7.16.1 Objective

To deliver a viable and fundable scheme and secure sufficient private sector funding on reasonable and appropriate terms to deliver the scheme and unlock public sector funding where gap funding is required

7.16.2 Tender Question / Request for Information

Provide your proposed approach for the viability and funding for the scheme. In order to support the response, please provide:

- Approach to viability for the overall development, including a viability strategy for any elements where viability is challenging.
- Approach to pre-development and development funding.
- Source of any proposed funding and potential funding terms that may apply.
- How you will ensure that funding is obtained at the best possible terms available.
- Consideration as to how the Council could invest in the scheme if it so chose to.
- Potential sources of public sector funding,

7.16.3 Further Guidance / BCC Requirements

The following items provide further guidance on this topic in terms of BCC's aspirations for the scheme. The Bidder will need to consider these aspirations / considerations as part of formulating their solution for this aspect of the scheme and in relation to their response to the tender question / request for information.

7.16.4 Scheme Aspirations / Considerations:

- Viability
 - The Council is seeking a financially viable scheme, but acknowledges that it may require public funding for enabling work and infrastructure. Where the scheme or parts of the scheme are not viable, a viability strategy should demonstrate the approach to achieving a viable scheme.
- Financial covenant strength
 - Where the scheme is relying on funding, then the bidder may be required to demonstrate an appropriate level of covenant strength of the source of that funding to ensure financial stability.
- Public Sector Funding – potentially through the West Midlands Combined Authority or Homes England.
 - Environmental Sustainability – The Council are keen for the partnership to explore the potential for gap funding to assist enhanced environmental sustainability aspects of the development.

7.17 Financial Structure

7.17.1 Objective

To provide a transparent financial structure that appropriately remunerates and rewards the parties in consideration of responsibilities, risks and contributions to the development of the scheme and fulfils BCC's obligation to achieve best consideration.

7.17.2 Tender Question / Request for Information

Provide your approach for the financial structure and remuneration of the development, including a Development Financial Appraisal for the overall scheme that can demonstrate how returns to both parties will be attributed.

The Development Financial Appraisal should include the following:

- Anticipated values and costs, along with any assumptions such as phasing;
- Approach to hurdle rates, returns and fees, including: development management, project management, professional fees, etc.;
- Impact and costs / values attributable to inclusion of any land outside of the 'red-line' boundary;
- The process by which any financial payment is guaranteed;
- Clear identification of how any value uplift will be shared, including approach to profit share / overage (i.e. triggers);
- Overall anticipated financial return presented as a Net Present Value on a date and using a discount rate to be advised by the Council.

Financial appraisals should be provided in live versions of either excel (in a format in which all cells and formulae are visible) or Argus Developer to allow the Council and their advisors to properly interrogate those appraisals.

7.17.3 Further Guidance / BCC Requirements

The following items provide further guidance on this topic in terms of BCC's minimum requirements and their aspirations for the scheme. The Bidder will need to consider these minimum requirements and aspirations as part of formulating their solution for this aspect of the scheme and in relation to their response to the tender question / request for information.

7.17.4 Minimum Requirements:

- The Council require an open and transparent process that will allow for the proper determination of whether Best Consideration has been achieved.

7.17.5 Scheme Aspirations / Considerations:

- Provisional Figures
 - The Council acknowledges that the inputs and outputs to the financial appraisal, along with a number of the assumptions, will be provisional during the dialogue and final tender stages. Consequently, the main focus of this topic during these stages will be to establish the most appropriate structure and risk / reward profile.
 - During the preferred bidder stage, the financial structure and approach will be worked up in greater detail in conjunction with the masterplanning and business plan work for overall approval by the Council at the conclusion of that stage.

- Further Financial Contributions by the Council
 - The financial structure should assume that the Council will not provide any additional financial contribution to the scheme in addition to the equity in their land. However, in the event that the Council would like to provide further financial contributions, the structure should identify how this would operate.
- Comprehensive Phased Development
 - A key delivery principle is the comprehensive development of the site.
- Operational Financial Structure
 - Following completion of the development, the scheme needs to be financially sustainable. The approach should indicate how this will be funded along with any potential long term revenue income stream for the Council.

APPENDIX 1 – DEVELOPMENT OPPORTUNITY AREA

The 'red-line' plan attached indicates the proposed boundary of the Ladywood Estate along with the specific area boundary for Ladywood Broad Street which extends to c. 1.55 ha. The eventual 'red-line' legal plans for the purpose of title transfer will be clarified during the course of the procurement process.

The red line above is indicative and for illustration purposes only