Preface:
“The role of A+DS is to support and promote Scottish Ministers’ policies and objectives for the built and natural environment. This role is intended to improve the quality of development in Scotland and support and promote excellence in the delivery of good architecture, successful places and efficient processes. This role requires A+DS to work with other key organisations to help to develop an effective focus on place, architecture and design policies and working practices.”

CREATING PLACES – A Policy Statement on Architecture and Place for Scotland (2013)

Front cover image credits:
Top centre - JMArchitects - Portobello High School
Top right - OPEN - Davidson’s Mill
Bottom left - Allan Murray Architects - Boroughmuir High School
Bottom centre - Oberlanders Architects - Housing at Craighouse
Bottom right - Jacobs Arup JV - Forth crossing

Issue date: November 2014
Contents

1 Who we are
2 What we do
3 When do we engage with development projects?
4 How does the Design Forum process work?
5 Our Principles

Appendix

• Workshop Discussion Topics
1. Who we are

Architecture and Design Scotland (A+DS) is a non-departmental public body of the Scottish Government. Our purpose is to promote the value of good architecture and sustainable places. We believe that design matters, that Scotland’s built environment is important to everyone and that a people-focus creates the best places. We provide advice and support, and share what works. We champion the highest standards in architecture and placemaking across all sectors, advocating a better understanding of the importance of quality design in both the public and private sectors.

A+DS Design Forum works during the design development phase for significant projects to support local authorities and developers from all sectors to realise the benefits of good design. The Forum comprises staff who give advice, manage and operate the programme of work, and a panel of around 40 volunteers who share their knowledge and expertise to inspire the best possible outcomes.

The Design Forum Panel consists of volunteers with a wide range of expertise and professional experience.
We can share what worked on other projects and encourage all participants to target their processes towards improved outcomes.

At the final reporting stage we help assess the design in relation to project aims and national standards.

We help build confidence around responses to context, towards effective placemaking.

At the final reporting stage we help assess the design in relation to project aims and national standards.

We help parties establish shared aims for a site which recognise both local needs and commercial imperatives.

We help learn lessons and celebrate successes, informing future projects.

Better places for people

**Stages of Support**
2. What we do

Our primary means of project support is through a Design Forum workshop series. In this we help parties to a project (the developer, designers, local authority and agencies) identify and agree key design principles at the formative or early stages of design development, when there is the greatest capacity for positive influence. These principles articulate the wider potential of development (within the built environment particularly) for the people the development will affect; the occupants, neighbours and local communities. The shared principles then form the basis for a continued dialogue during design development, and for the appraisal of the emerging solution.

We assist by sharing an understanding of what is being achieved elsewhere and by helping the parties to test possibilities and consider what has been learnt from other consultations, such as with the local community. In these discussions we take the role of the ‘honest broker’ and look to encourage each party to the development to work to secure the best outcome. At the end of the dialogue we assist local authorities in assessing and recognising the merits of proposals which have come forward, considering the proposals in relation to the principles established at the beginning of the process.

When it is agreed that a project will come into the Design Forum process, A+DS staff take the lead in managing the engagement. We liaise between the primary participants, the project team and the Local Authority, to agree timings and attendance. Though we encourage a spectrum of participants, including key agencies as and when appropriate, we aim to keep numbers low and encourage consistency of representation to maintain an informal atmosphere and provide a useful and valued discussion.
Stages to Engage

Design Forum begins here...

- Site selection
  - Briefing designers
  - Defining skills needed
  - Defining inter agency expectations
- Assembling design team
  - Considering procurement methods
  - Articulation of vision
- Consideration of role of design policy

Design emerging

- Sketches
  - Feasibility studies
  - Option appraisals
  - Site analysis
- Intermediate Workshop

Developed design

- Concluding Workshop
  - EIA
- RIBA Stage C Design
  - Strategic masterplan report
- RIBA Stage D Design
  - Formal submissions to planning authority occur afterwards

Buildings drawn in context

Stages to Engage
3. When do we engage with development projects?

Design Forum engages with projects at a variety of scales to assist in ways which are most relevant to the needs of each procuring agency and each Local Authority. We have established the following means of prioritising the selection of projects for direct engagement:

**Locally Significant Projects**
We support Local Planning Authorities across Scotland with emerging masterplans and development projects they consider the most significant in their area. We encourage referrals of projects which are considered as particularly critical in the establishment, or maintenance, of a sense of place. What is considered locally significant will vary between authorities to reflect the size and urban/rural nature of each but should be based on the prominence or environmental sensitivity of a development, regardless of scale. The offer from A+DS to the Local Authorities, and the selection criteria which might be used for projects, is contained in the “Memo of Understanding” which can be downloaded from our website.

**National and Strategic Projects**
We support other partners in the public sector to deliver buildings, infrastructure and places of lasting quality. Projects are generally those identified within the National Planning Framework as having national importance, or those referred by public sector clients as important to their sector or organisation. This may be due to their novel nature, their potential to influence other similar projects or the sensitivity of the location. In all cases, we encourage referrals of projects where outcomes could improve through facilitated dialogue with key agencies and access to additional expertise in the lead up to a planning application.

**Other project support**
Where projects cannot be supported through forum engagement we may be able to provide advice to Local Authorities in relation to the success measures highlighted within our web resource. The A+DS website offers a number of briefing resources and case studies including the learning from almost 10 years of reviewing projects and provides links to wider references and guidance. This resource can also be used to assist others in briefing and appraising projects.
Workshop Preparation and Timings

- Agree timing
- Briefing to A+DS
- Draft imagery to A+DS
- Site visit
- Design Forum Workshop
- A+DS note of advice

- 1-2 weeks
- Up to 2 weeks
4. How does the Design Forum process work?

Typical Meeting Arrangements

Initial workshops take place locally to the development site, and typically take a half to a full day depending on location and scale of the project. Later forums are generally conducted in A+DS Edinburgh or Glasgow offices and take a half day each. A+DS video conferencing equipment can be offered to more distant Local Authorities/teams in order to allow remote attendance of some team members.

Briefing Material

In the run up to a meeting we issue a pro-forma to both primary parties seeking information which will form the basis of the brief to our panel. We ask that participants return the information, including any draft design studies and site analysis, around two weeks before the meeting. An agenda is then compiled and circulated by A+DS staff from issues highlighted by the project team and Local Authority. We can provide guidance on the information it is helpful to include in the advance briefing, and on the day.

A+DS Workshop outputs

After initial and intermediate workshops A+DS staff produce provisional advice in the form of interim notes which are deemed work in progress and hence are not normally released into the public domain*. These notes form the basis of the agenda for any subsequent workshops, creating continuity in discussion topics. Only after a concluding workshop is an Appraisal Report produced. This draws on the process and describes the level of support which A+DS can ascribe to the design as presented. We anticipate that this appraisal will be referred within the Local Authority Planning Officer’s report to planning committee. Once the application has been lodged the appraisal will be made public on the A+DS website.

Confidentiality

Any information submitted to, or created by, A+DS will remain confidential* until such time as the project is placed into the public domain, as above, in connection with a planning application. A+DS reserves the right to lodge interim notes on our website in full if extracts of the interim notes are made public by other parties.

*(subject to statutory regulations)
Typical Workshop Series

Design Appraisal workshop in Glasgow or Edinburgh

First workshop local to site

Intermediate workshop in Glasgow or Edinburgh

A+DS note of advice

A+DS appraisal

concept realisation

update briefing

update briefing

site visit

brief A+DS

concept development

design initiation
Planning a Workshop Series

A Design Forum workshop series is tailored to the needs and timescales of each project. A+DS staff will seek to manage these within a common structure. Workshop types vary to suit the engagement stage reached. Participants to workshops would generally include the client, lead designers, local authority representatives (including planning and potentially transportation officers) and agencies such as SNH and Historic Scotland where appropriate. A+DS would normally provide 2 staff and 2-4 panel members.

Initial Workshop
This is carried out at briefing stage or at an early design stage. This meeting includes a site visit and a discussion of the key considerations in relation to the site, the planning and policy contexts, and the aims of the development. At an initial meeting we would expect some examination and analysis of the site and its context to be available, and potentially some early feasibility studies or outline concepts. The aim of this workshop is to support the development and articulation of key principles that will be tested and developed through the design process.

Intermediate Stage Workshop(s)
Design proposals are generally at an interim stage: a stage at which wider expertise and an inter-agency review will provide constructive back-up and testing during design development. The format is an informal discussion and workshop which is aimed at supporting emerging proposals, providing timeous feedback from all participants on the concepts in development and assisting in identifying and resolving design risks.

Design Appraisal Workshop
This meeting concludes the Design Forum engagement with an appraisal of the scheme in relation to principles established throughout the forum dialogue. The workshop would take place at a point where resolved design information is available and when the design proposals have been drawn in context, but prior to the submission of the planning application. Though all parties are encouraged to engage in dialogue, and their opinion informs the output of the meeting, the appraisal produced at the end of the series describes A+DS’s independent assessment of the scheme, and it is expected that this will inform the authorities consideration of the proposals once submitted.
“The A+DS Design Forum process has been of considerable value to me as the Case Officer dealing with this locally significant development proposal and I have no doubt that it has added value in terms of ‘Placemaking’.”

Local Authority - Masterplanning project in historic context

“Thanks for all your work … it was very worthwhile.”

Project Team - Masterplanning project in historic context

“We were already in dialogue with the LA, but participating in this process was seen as an important aspect of that relationship.”

Project Team - Major mixed use masterplanning project

“Comments have proven useful in developing parts of the next stage of the project. Would welcome further input.”

Project Team - Town centre masterplanning project

“Design Forum

“Comments have proven useful in developing parts of the next stage of the project. Would welcome further input.”

Project Team - Town centre masterplanning project

“The A+DS Design Forum process has been of considerable value to me as the Case Officer dealing with this locally significant development proposal and I have no doubt that it has added value in terms of ‘Placemaking’.”

Local Authority - Masterplanning project in historic context

“Thanks for all your work … it was very worthwhile.”

Project Team - Masterplanning project in historic context

“We were already in dialogue with the LA, but participating in this process was seen as an important aspect of that relationship.”

Project Team - Major mixed use masterplanning project

“…”... the meeting yesterday was very useful and provided some good points of discussion for us to consider as the design progresses.”

Project Team - Urban redevelopment project

“I felt the panel were very respectful of the timescale for the project and their comments were tailored to suit.”

Project Team - Major infrastructure project

“That was a really useful session, we have a substantially better chance of a good masterplan than we did three hours ago.”

Local Authority - Housing masterplanning project

“…”... thank you for your engagement in the development proposals which we as a Planning Authority found very useful.”

Local Authority - Energy infrastructure project

“…”... thank you for your engagement in the development proposals which we as a Planning Authority found very useful.”

Local Authority - Energy infrastructure project

“…”... the meeting yesterday was very useful and provided some good points of discussion for us to consider as the design progresses.”

Project Team - Urban redevelopment project

“I felt the panel were very respectful of the timescale for the project and their comments were tailored to suit.”

Project Team - Major infrastructure project

“…”... thank you for your engagement in the development proposals which we as a Planning Authority found very useful.”

Local Authority - Energy infrastructure project

“…”... the meeting yesterday was very useful and provided some good points of discussion for us to consider as the design progresses.”

Project Team - Urban redevelopment project

“I felt the panel were very respectful of the timescale for the project and their comments were tailored to suit.”

Project Team - Major infrastructure project

“…”... thank you for your engagement in the development proposals which we as a Planning Authority found very useful.”

Local Authority - Energy infrastructure project

“…”... the meeting yesterday was very useful and provided some good points of discussion for us to consider as the design progresses.”

Project Team - Urban redevelopment project

“I felt the panel were very respectful of the timescale for the project and their comments were tailored to suit.”

Project Team - Major infrastructure project

“…”... thank you for your engagement in the development proposals which we as a Planning Authority found very useful.”

Local Authority - Energy infrastructure project

“…”... the meeting yesterday was very useful and provided some good points of discussion for us to consider as the design progresses.”

Project Team - Urban redevelopment project

“I felt the panel were very respectful of the timescale for the project and their comments were tailored to suit.”

Project Team - Major infrastructure project
The value ascribed to the involvement of A+DS links to our service principles. We seek, through the Design Forum process, to encourage the articulation of the wider role of development within the built environment, supporting Clients, Design Teams and Local Authorities to establish and secure a shared vision. Our aim is to provide:

- **Support across Scotland** - meeting stakeholders locally and visiting sites throughout Scotland, helping align national with local policy considerations.
- **An informal and constructive forum for dialogue** - through interactive workshop style meetings which encourage the active participation of all parties, bridging professional boundaries.
- **Assistance in delivering better outcomes** - for building users, neighbours and the immediate and wider communities affected by development – maintaining a focus on people’s experiences of the developing place.

We do this by being:

- **Responsive** - using small groups of specialists to respond quickly.
- **Relevant** - understanding the needs and expectations of procurers.
- **Informed** - advice will be clear and direct, and will stem from good quality briefing and multiple engagements with projects.
- **Clear** - providing certainty at the early design stages when the support of A+DS, the Local Authority and key agencies will be of most assistance.
Appendix: Workshop Discussion Topics

An agenda of workshop discussion topics is established mutually before the initial workshop, then updated for subsequent workshops. Discussion topics are derived from the following long list:

CLIENT PRIORITIES
Client aspiration/vision
Commercial aims/constraints/expectations/timescales
Site selection/ownership/acquisition strategy/constraints
Procurement methodology

BUILT FORM BRIEF/PROGRAMME/CONSTRAINTS
Users: needs/accommodation requirements
Programme: floor areas/unit numbers/scale/massing/density
Performance: design life/cost vs longevity/materials/flexibility
Sustainability: natural resources/energy efficiency/climatic design/renewables
Resource efficiency
Site constraints: topography/orientation/climatic/ground conditions/mineral
Precedents: relevant exemplars

PLANNING POLICY CONTEXT
Site specific spatial policy framework
Wider community infrastructure
Strategic services infrastructure/environment/flooding
Strategic transport infrastructure
Historic Buildings/context
Landscape Designations/content

Policy/Agency Link
Policy Link
LDP
LDP/SPG
LA/LEA/NHS
LA/SEPA/Scottish Water
LA/Transport Scotland
LA/Historic Scotland
LA/SNH
URBAN DESIGN
Interface with local community: cultural context/history/memory
Interface with landscape context: topography/views/visibility/landscape character
Interface with built form context: scale/form/massing/density/character/materials
Interface with movement networks: permeability/accessability/local connectivity/access to facilities and public transport
Design of new streets and public realm: activation, enclosure, attractiveness

Interfaces between public realm, semi-public and private space
Legibility, character and identity of streets and urban spaces
Adaptability, flexibility and longevity of new built form
Mix of new uses, tenures and integration of community buildings
Design of new parks and open space

SKILLS/CONSULTEEs
Design team skills/specialist skills
Users role/engagement
Stakeholder engagement
Community engagement