Masterplans: A Guide for Developers

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1.0 Introduction

1.1 Masterplans: A Guide for Developers has been prepared by the Council to provide developers and stakeholders with an outline of what the Council’s expectations are in respect of the process of preparing and approving masterplans. This will result in a more transparent process for developers and members of the public alike and should prevent wasted effort and resources in developing schemes that are inappropriate and do not meet the Council’s expectations.

1.2 New development inevitably leads to both physical change and also to changing pressures on infrastructure provision within an area. There is an increasing need to lead development in a more cohesive and strategic manner to ensure that places change and grow in an interconnected way and that infrastructure requirements such as the road network, drainage, open space, etc are provided in a timely and appropriate manner.

1.3 In the past ad hoc developments throughout the region have led to dis-connected areas, which are out of character with their surroundings and have also led to future problems in relation to the provision and maintenance of infrastructure.

1.4 The Council is developing a number of ways in which to promote a better quality of development in terms of design and environment in our towns and villages and to ensure that new developments relate more to their surroundings and service provision. Such measures include an increased emphasis on design quality through the overarching policies contained within the Local Development Plan 2 (LDP2), supported by supplementary guidance (such as Design Quality of New Development, Open Space, Historic Built Environment, SuDs, etc.), the submission of design and access statements with planning applications and also the need for the preparation of masterplans for developments on generally larger scale and more complex sites.

1.5 The masterplans will provide a strategic overview and framework to ensure that developments meet the requirements of the development plan, specific site requirements and that infrastructure can be provided in a more comprehensive rather than piecemeal way. The LDP2 contains site guidance for all those sites that have been allocated in the plan for development. A number of these require the developers/applicants to submit a masterplan for the entire site area as part of the application process. These sites are listed in Appendix 1. Should a planning application come forward without a masterplan, or one that does not include the whole site area, when one has been stated as being required then this will not comply with, and will be contrary to, the LDP2 and the application will be recommended for refusal on the grounds of lack of information.

1.6 Before a masterplan is prepared, the Council will aim, during the lifetime of the LDP2, to produce masterplan briefs for the sites listed in Appendix 1. These will outline the main planning and development principles on which development of the site will be based and the elements that should be included and addressed within the masterplan and against which it will be assessed. The masterplan briefs will be agreed by committee as non-statutory supplementary guidance and will be a material consideration in the determination of the suitability of the masterplans and planning applications that are submitted.

1.7 It should be noted that masterplans may also be required for other allocated sites not listed in Appendix 1 or for sites that come forward for development which are not currently allocated in the LDP2, where there are specific planning issues to be overcome. Early discussions with the planning authority will determine the need for masterplanning in these cases.

2.0 Why Masterplan?

2.1 Masterplanning can help to raise the general standards of developments and their design whilst helping to create quality places. PAN 83 states that “we rely on masterplans to:
• provide the appropriate physical environments to support strong communities;
• support a rich and pleasurable quality of life for inhabitants and visitors;
• connect people and places by providing ease of movement within, and through, developments; and
• create places of distinction and enduring quality.

Masterplanning can help to achieve these outcomes by providing a structured approach and framework to a wide range of complex issues. If done well, masterplanning can promote sustainability, in its widest sense, and deliver places where people want to live.“

2.2 Masterplanning seeks to establish principles of how a place will change physically, economically and socially providing a framework for development that will, in all likelihood, be delivered over time, incrementally or in a piecemeal manner. Uncertainty may happen due to development occurring in phases that are not continuous, phases being developed and designed by different people, land ownership changing hands, a change in funding availability and requirements, and a change in economic conditions. Masterplans must therefore be capable of setting the appropriate level of prescription and standards while providing for a degree of flexibility in the face of an unpredictable future and be based on a long-term vision that will work as a whole or in parts which is essential for the provision of infrastructure.

2.3 Ultimately, they should aspire to providing a combination of high level sustainable development with good development principles. A sense of place and coherence come primarily from the following qualities of buildings and spaces:
• Scale;
• compositional rules for building design;
• grain of built form;
• balance of diversity or uniformity.

2.4 A masterplan allows the planning authority and others to see the extent of the analysis on which the proposal has been based and explains how a site or a series of sites will be developed. It is a document that describes and maps an overall development concept, including present and future land use, urban design and landscaping, built form, infrastructure, circulation and service provision. It is based upon an understanding of place and it is intended to provide a structured approach to creating a clear and consistent framework for development including the phasing and timing of development. Masterplans should not be seen as rigid blueprints for development and design but as setting the context within which individual projects would come forward.

2.5 Masterplans are produced by the developer to explain how the site will be developed in accordance with the site guidance and the masterplan brief where appropriate. They will need to be proportionate in relation to the size of the site and the extent of planning issues to be addressed.

2.6 The social, economic and environmental context within which a masterplan is formulated is unique. Years, even decades, can elapse between the recognition that a masterplan is required and the moment when development happens on the ground. This guide focuses on the up-front strategic thinking that a developer should undertake in order to set out an approach to development over the subsequent years (phasing).

3.0 Process for Producing a Masterplan

3.1 Each site will have its own set of circumstances and level of complexity. The level of detail within each masterplan will also differ and will need to be proportional and reflect the nature and complexity of issues to be addressed at the site.
This can range from the very basic that only include some of the elements of Table 1 below to those that will be very detailed and include most, if not all, of the elements in Table 1. It is important, therefore, that developers and applicants hold early discussions with the planning authority to establish the nature and parameters of the masterplan to be produced to ensure that they do not waste time, effort and resources on producing an unacceptable masterplan or one that is more detailed and costly than is required. These early discussions can also involve consideration of the requirements emerging from any masterplan brief that has been prepared for a site.

3.2 The process for producing a masterplan is set out below and further guidance is contained in the Design Quality of New Development Supplementary Guidance (SG) which should also be taken into account when producing a masterplan:

**Understand the Place**

**Develop the Design Concept**

**Finalise the Masterplan**

**Understand the Place:**

- **Site and Area Appraisal:** is carried out in order to develop a good understanding of the site, its characteristics and wider context including environmental, social and economic factors;

- **Constraints and Opportunities:** are identified to assess developable area of the sites and limitations to development but also to identify assets to enhance the development;

- **Policy Context:** identify main policy documents to be taken into consideration;

- **Analysis:** use the information gained in the appraisal to identify opportunities and constraints.

**Develop the Design Concept:** Use the information gained from earlier stages and incorporate the design principles set out in the Design Quality in New Development SG to develop concepts and consider layouts in terms of three key uses, i.e. buildings, spaces and movement. It is expected that a number of feasible options will be developed which identify fixed elements and features but also identify where different choices can be made. Once options have been developed it is advisable to test them to find the ‘best’ solution which achieves the vision and aspirations for the site.

**Finalise the Masterplan:** Once a design concept is agreed the masterplan should be formulated and then evaluated.

4.0 What Should a Masterplan Contain?

4.1 A masterplan should consider how the development fits with the surrounding environment, and where necessary be informed by detailed consideration of, for example, landscape and visual impact assessment, ecological appraisal, historic environment appraisal and design or character appraisal. It should assess in detail and respond to specific site issues such as flood risk, contaminated or unstable land, heritage assets and protected species.

4.2 The elements outlined in Table 1 below set out the Council’s expectations for what information and analysis should be included within a masterplan. The actual content and level of detail to be included for each individual site would form the basis of early discussions with the planning authority.

4.3 The actual format of masterplans may vary from development to development but all should include the basic elements laid out in Table 1 to a greater or lesser degree as agreed in the early discussions.
Table 1 - Masterplan Elements

**VISION**

The vision should be an aspirational description of what the development is aiming to achieve or accomplish.

A masterplan sets out principles that can be applied with a degree of flexibility. A good masterplan has a ‘vision’ that helps shape what happens on the site, giving it coherence and a real sense of identity and place. A vision is likely to derive from an understanding of the characteristics of a site, its history and geography, to suggest how a sense of place can be created and related to what is there already. It is important that the vision is not lost during the development of the design. Therefore, as it develops, the masterplan must be constantly checked against the original vision.

This section should describe in words the kind of place that is being created.

**SITE APPRAISAL**

Further details in respect of site appraisal requirements can be found in the Design Quality of New Development SG. However the following broad issues should be included:

Context – how well it relates to its surrounding area in terms of its immediate and wider context:

- Local area;
- Site description and physical context; and
- Services and public utilities.

Identity – how well the development creates and reinforces local identity:

- Surrounding buildings;
- Use of space;
- Hard landscaping; and
- Soft landscaping.

Connection – how well the development connects to the surrounding access routes and how easy it is to move through the site:

- Pedestrian / cycle access;
- Public transport; and
- Vehicular Movement.

Community - how well the site connects and is accessible to existing open spaces and community facilities such as shops, schools, community halls, leisure facilities, etc.

This section is likely to include maps, photographs and descriptive text.

**CONSTRAINTS AND OPPORTUNITIES**

Information on any known constraints that might impact on the development and its layout should be included. Consideration also needs to be provided in respect of those assets within the site that should be retained and will enhance the completed development.

Maps, photographs and text can be used as appropriate.
POLICY CONTEXT

The following planning policy documents should also be considered and the masterplan should describe how these have been taken into account where relevant:

- National planning policy guidance;
- Local Development Plan 2;
- Supplementary guidance; and
- Regeneration strategies and other area-based initiatives.

This section is expected to include text to show an understanding of the relevant documents.

DEVELOPMENT PRINCIPLES

This section sets out the main elements of the masterplan and will cover a number of aspects such as design matters, the provision of infrastructure and developer contribution requirements.

Development Principles will be formulated that will be individual to a specific development scheme and will set out the approach to the development that is being proposed taking into account the design principles, vision, aims and objectives.

Design principles have been identified within the Design Quality of New Development SG and the masterplan should clearly lay out and describe how these are being taken into account in developing the masterplan.

Additional considerations within this section could also include some or all of the following as appropriate:

- Land uses sought / acceptable / unacceptable;
- The viability of the uses or combination of uses selected, including consideration of market demand and development costs;
- Additional infrastructure and facilities to be provided and by whom including SuDs provision;
- Planning standards to be applied, and the degree of flexibility;
- General layout of the development including hierarchy of roads and other access points, parking and circulation for all modes of transport;
- Scale, massing and height of buildings indicating a variable density across the site;
- For housing sites the range and mix of housing types and nature of affordable housing provision;
- Landscaping and open space provision;
- Buildings to be retained (including listed buildings);
- Design criteria;
- Sustainable development, including energy efficiency and on site renewable energy;
- The expected phasing of the development;
- Off-site requirements and developer contributions; and
- Elements required in any associated development brief or supplementary guidance.

This section should be illustrated with maps and diagrams as appropriate to provide examples of the various elements of the masterplan.
### MASTERPLAN PROPOSALS

It is expected that in arriving at the final proposal stage, a number of design options / concepts will have been produced which will have been tested against the original aspirations and the vision to ensure the most appropriate solution is delivered. These options are not expected to be shown in the masterplan but could simply be discussed in the process section below.

The masterplan should set out a design solution to meet the requirements of: the development principles, LDP2 policies and site guidance, any masterplan brief that has been produced and supplementary guidance; and be presented in the form of both text and illustrations (photographs and sketches). The resulting design is expected to have been individually tailored to meet the site requirements. The document should also set out those aspects of the masterplan that are definitive and vital to the creation of a successful place and those where more flexibility can be applied.

The masterplan should establish the aim of design quality in architecture, and create a framework within which good quality architecture can flourish. For some aspects of the masterplan it may be appropriate to give guidance as to the architectural approach, for example the relationship to a listed building.

It is expected that the text includes an explanation as to why certain aspects have been developed in the way they have, e.g. the open space framework for the site. The text should be concise and describe the process undertaken to produce the concept. It should explain the thinking behind the design and proposals.

It is expected that illustrations will be provided where appropriate including an overall map showing the important elements of the masterplan. This could include such aspects as the road hierarchy, open space provision, links and connections, phasing, etc. It is not expected that such a diagram is a detailed site layout but a more strategic overview of the main elements of the masterplan.

The aim is to explain the design approach and therefore any illustrations must be easy to interpret and relate clearly to the text. The document is expected to be proportional to the size and nature of the proposed development site.

### IMPLEMENTATION, DELIVERY AND FEASIBILITY

A statement of how the various elements of the masterplan are to be implemented, phased, timescales and some indication of the economic feasibility of the scheme as a whole (including infrastructure requirements) should be included.

This section will generally be comprised of text but illustrative maps showing the phasing scheme may also be helpful.

### STATEMENT OF PROCESS UNDERTAKEN (INCLUDING CONSULTATION WHERE RELEVANT)

A statement of the process and key tasks undertaken to produce the masterplan. This should also include any consultation undertaken with agencies, organisations and the general public, the outcome of any consultation and how the developer has responded and amended the scheme as a result.

A masterplan carries more weight if it has been prepared in consultation with the public, formally adopted by the local planning authority and is consistent with national and local planning guidance.
5.0 Evaluation Process

5.1 Every masterplan responds to unique circumstances. People evaluating masterplans need to balance idealism with pragmatism and proportionality. A good masterplan must be based on understanding the nature of a place before starting to design for it.

5.2 When evaluating masterplans, the Council will consider how a broad range of issues have been taken into account. Appendix 2 lays out the type of considerations that will be taken into account in assessing masterplans that are submitted to the Council. The evaluation process will be proportional depending on the scale and complexity of issues and the nature of the masterplan. Not all of the aspects listed in Appendix 2 will relate to all masterplans and therefore these will be considered on a case by case basis where the Council considers them to be appropriate.

6.0 Status

Establishing the masterplan
In the planning process

6.1 Placing a masterplan in the context of the planning process is vital if its broad principles are to be safeguarded. The policy framework creates the opportunity for masterplans to have considerable influence in shaping the development of an area. Masterplans that are agreed by the relevant Council committee can enable the local planning authority to place significant weight on the masterplan in determining individual planning applications.

6.2 Masterplans should be produced prior to the development of more detailed proposals for a site. Ideally they should be submitted to the Council for consideration and assessment prior to their submission as part of a formal planning application. Please see Appendix 3 for further detail on the submission and assessment process.

6.3 The masterplan should cover the whole site irrespective of whether the application has been submitted for either the whole site or for the first phase of development.

Where development may already have commenced or be approved for part of the site the masterplan should be submitted for the subsequent phase(s). This applies to sites that have been granted planning permission prior to the adoption of the Local Development Plan 2.

6.4 The Council will assess the masterplan for compliance with the site guidance contained in the LDP2, the masterplan brief (where one has been prepared), relevant SGs and the agreement from the early discussions with the planning authority (where these have occurred). Further discussion with the applicant may be required as part of the assessment process. Whether or not prior discussions have taken place the Council will assess and evaluate the masterplan on the basis of the elements included in Appendix 2 taking into account the size of the site and the complexity of issues to be covered.

6.5 Where the Council agree to the content and scope of the masterplan, and subject to all other factors in assessing the application being acceptable, then as part of the recommendation in the case officer’s report the masterplan will normally be accepted by planning condition. The masterplan will then be used as a material consideration in the determination of future applications.

6.6 Where the Council does not agree to the content and scope of the masterplan as submitted, the applicant will be given the opportunity, following feedback, to make any necessary changes and amendments. Should this still not result in an acceptable masterplan / proposal then the application will be recommended for refusal.

6.7 Where a masterplan covers a site in more than one ownership or under the control of more than one developer then the Council will consult the other owners / developers in order that they have the opportunity to consider the elements of the masterplan that may impact on other land within the site. In these cases the onus will be on the other landowners to consider the masterplan in a timeously manner so as not to unreasonably delay programming of the site for the applicant.
It is in the interests of all landowners to positively engage in this process as there may be only limited scope to significantly amend major aspects of the masterplan once development has commenced on the wider site.

6.8 Applicants may be requested to enter into a processing agreement where it appears that there might be delays in submitting and assessing the masterplan requirements.
Appendix 1: Sites Requiring a Masterplan

The list of sites below are those that are specifically mentioned in LDP2 as requiring a masterplan. Other sites, either allocated or not in the plan may also require a masterplan due to changing and unforeseen circumstances during the plan period.

<table>
<thead>
<tr>
<th>Settlement</th>
<th>Site Ref and Name</th>
<th>No of units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annan</td>
<td>ANN.H1 Land north of Windermere Road</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td>ANN.H2 Land south of Windermere Road</td>
<td>105</td>
</tr>
<tr>
<td></td>
<td>ANN.H8 Land between Hallmeadow Place and Elm Road</td>
<td>130</td>
</tr>
<tr>
<td></td>
<td>ANN.H204 Watchhall</td>
<td>200 beyond 2029</td>
</tr>
<tr>
<td></td>
<td>ANN.B&amp;I201 South of the A75(T) and east of the B6357</td>
<td>7.53 hectares</td>
</tr>
<tr>
<td>Canonbie</td>
<td>CAN.H1 Riverside Park</td>
<td>85</td>
</tr>
<tr>
<td>Castle Douglas</td>
<td>CSD.H3 East of Ernespie Road</td>
<td>130</td>
</tr>
<tr>
<td></td>
<td>CSD.H5 West of Torrs Road</td>
<td>133</td>
</tr>
<tr>
<td></td>
<td>CSD.H6 South of Jenny's Loaning</td>
<td>190 beyond 2029</td>
</tr>
<tr>
<td></td>
<td>CSD.H203 Land at The Stables</td>
<td>180</td>
</tr>
<tr>
<td>Dumfries</td>
<td>DFS.H1 Barnhill</td>
<td>259</td>
</tr>
<tr>
<td></td>
<td>DFS.H4 Heathhall College</td>
<td>176</td>
</tr>
<tr>
<td></td>
<td>DFS.H5 Ladyfield</td>
<td>489</td>
</tr>
<tr>
<td></td>
<td>DFS.H7 Brownrigg Loaning</td>
<td>500 beyond 2029</td>
</tr>
<tr>
<td></td>
<td>DFS.H8 and DFS.H205 Catherinefield Farm</td>
<td>374</td>
</tr>
<tr>
<td></td>
<td>DFS.H218 Oaklands</td>
<td>111 and 150 units beyond 2029</td>
</tr>
<tr>
<td></td>
<td>DFS.H262 Maxwelltown High School</td>
<td>104</td>
</tr>
<tr>
<td></td>
<td>DFS.B&amp;I253 Land at Starryheugh</td>
<td>9.12 hectares</td>
</tr>
<tr>
<td></td>
<td>DFS.MU205 Midsteeple Quarter, High Street</td>
<td>0.5 hectares</td>
</tr>
<tr>
<td>Eastriggs</td>
<td>ERL.MU1/ERL.MU202 Stanfield Farm and Land adjoining Stanfield Farm</td>
<td>200 units plus Class 4 business units</td>
</tr>
<tr>
<td>Ecclefechan</td>
<td>ECC.H3 Ibrak Farm</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td>ECC.B&amp;I1 Land adjoining B7076, Jct 19</td>
<td>11.38 hectares</td>
</tr>
<tr>
<td>Gretna Border</td>
<td>GTN.H2 Land north of Victory Avenue (Phase 1)</td>
<td>104</td>
</tr>
<tr>
<td></td>
<td>GTN.H7 Land north of Victory Avenue (Phase 2)</td>
<td>160</td>
</tr>
<tr>
<td></td>
<td>GTN.MU1 Former Golf Course</td>
<td>200 units plus 1 ha for business units</td>
</tr>
<tr>
<td>Johnstonebridge</td>
<td>JSB.H2 Land west of Primary school</td>
<td>90</td>
</tr>
<tr>
<td>Kirkcudbright</td>
<td>KBT.H1 Mersehouse/Mersecroft</td>
<td>70</td>
</tr>
<tr>
<td></td>
<td>KBT.H3 Land at Parkhouse</td>
<td>76 beyond 2029</td>
</tr>
<tr>
<td></td>
<td>KBT.H205 Land at Long Acre</td>
<td>76 beyond 2029</td>
</tr>
</tbody>
</table>
## Appendix 2: Appraisal and Evaluation

### COMPONENT
**EVALUATION QUESTIONS**

**GENERAL**
- If there was a brief, does the masterplan accord with it?
- Does the masterplan meet the relevant policies (national, LDP2, supplementary guidance)?
- Does the masterplan relate to the original aspirations or vision for the place?
- Does the masterplan show a high level of ambition and design quality and how can design quality be maintained throughout the project?
- Are there mechanisms in place throughout the subsequent detailed design stages to assist in delivering the aspirations and vision of the plan?
- Is the masterplan deliverable / feasible?
- Is the timing of the programme for delivery realistic?
- Will the proposals be phased, if so how?
- Does the proposed phasing scheme provide the most appropriate approach?
- Is there a realistic expectation based on funding levels available?
- Has there been an assessment of the likely scale and allocation of infrastructure costs? How are these to be phased throughout the delivery and implementation of the proposals to ensure that the timely provision of essential features and infrastructure are provided?
- Is the masterplan accompanied by an explanation of how it can be delivered by different parties on a phased basis?
- Is it evident that good urban design principles have been incorporated within the masterplan?
- Does the masterplan demonstrate a high level of integration between its constituent parts and within its wider setting?
- In situations where there are adjacent masterplans, how well do they integrate – who takes the lead in drawing them together?
- How are new communities to integrate with existing ones?
- Has there been effective community / stakeholder engagement and participation?
- Have any key stakeholders, such as utilities and services, been involved in the progression of the design solution?

### SITE AND AREA APPRAISAL
- Is there evidence of a full site analysis i.e. context, identity and connection / links to the wider area?
- Has there been a thorough analysis of the site, its setting and its history, that evidently informs the masterplan’s development?
- Has a contextual analysis been carried out, and has this informed the development of the masterplan?

### Locations

<table>
<thead>
<tr>
<th>Location</th>
<th>Project Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Langholm</td>
<td>LHM.H4 Murtholm Farm</td>
</tr>
<tr>
<td></td>
<td>200</td>
</tr>
<tr>
<td>Lockerbie</td>
<td>LRB.H4 Netherplace Farm</td>
</tr>
<tr>
<td></td>
<td>200</td>
</tr>
<tr>
<td></td>
<td>LRB.B&amp;I204 Land north of Dryfe Road Industrial Estate</td>
</tr>
<tr>
<td></td>
<td>6.76 hectares</td>
</tr>
<tr>
<td></td>
<td>LRB.B&amp;I205 Land west of Ice Rink</td>
</tr>
<tr>
<td></td>
<td>4.44 hectares</td>
</tr>
<tr>
<td>Moffat</td>
<td>MOF.H4 Selkirk Road</td>
</tr>
<tr>
<td></td>
<td>200</td>
</tr>
<tr>
<td></td>
<td>MOF.MU2 Former Woollen Mill</td>
</tr>
<tr>
<td></td>
<td>2.43 hectares</td>
</tr>
<tr>
<td>Newton Stewart/Minningaff</td>
<td>NST.H7 Old Hall</td>
</tr>
<tr>
<td></td>
<td>50 plus 100 beyond 2019</td>
</tr>
<tr>
<td></td>
<td>NST.MU1 Masonfield</td>
</tr>
<tr>
<td></td>
<td>140 plus Class 4 business units</td>
</tr>
<tr>
<td>Stranraer</td>
<td>STR.MU1 Stranraer Waterfront</td>
</tr>
<tr>
<td></td>
<td>13.17 hectares</td>
</tr>
<tr>
<td>Thornhill</td>
<td>THN.H2 Hospital Brae</td>
</tr>
<tr>
<td></td>
<td>112</td>
</tr>
<tr>
<td></td>
<td>THN.H3 Boatbrae</td>
</tr>
<tr>
<td></td>
<td>64</td>
</tr>
<tr>
<td></td>
<td>THN.H4 Queensberry Beeches</td>
</tr>
<tr>
<td></td>
<td>103 beyond 2029</td>
</tr>
<tr>
<td></td>
<td>THN.H5 Queensberry Park</td>
</tr>
<tr>
<td></td>
<td>122 beyond 2029</td>
</tr>
<tr>
<td></td>
<td>THN.MU1 Gallows Knowe</td>
</tr>
<tr>
<td></td>
<td>47 units plus 2.60 ha business land</td>
</tr>
<tr>
<td>A74(M)</td>
<td>A74(M).B&amp;I2 Hayfield/Newhope, Kirkpatrick Fleming</td>
</tr>
<tr>
<td></td>
<td>26.24 hectares</td>
</tr>
<tr>
<td></td>
<td>A74(M).B&amp;I3 Redhouse, Kirkpatrick Fleming</td>
</tr>
<tr>
<td></td>
<td>28.19 hectares</td>
</tr>
<tr>
<td>Chapelcross</td>
<td>CPC.B&amp;I1 Chapelcross North</td>
</tr>
<tr>
<td></td>
<td>19.44 hectares</td>
</tr>
<tr>
<td></td>
<td>CPC.B&amp;I2 Chapelcross South</td>
</tr>
<tr>
<td></td>
<td>7.03 hectares</td>
</tr>
<tr>
<td></td>
<td>CPC.B&amp;I3 Chapelcross West</td>
</tr>
<tr>
<td></td>
<td>33.34 hectares</td>
</tr>
</tbody>
</table>
## Appendix 2: Appraisal and Evaluation

<table>
<thead>
<tr>
<th>COMPONENT</th>
<th>EVALUATION QUESTIONS</th>
</tr>
</thead>
</table>
| GENERAL                    | • If there was a brief, does the masterplan accord with it?  
• Does the masterplan meet the relevant policies (national, LDP2, supplementary guidance)?  
• Does the masterplan relate to the original aspirations or vision for the place?  
• Does the masterplan show a high level of ambition and design quality and how can design quality be maintained throughout the project?  
• Are there mechanisms in place throughout the subsequent detailed design stages to assist in delivering the aspirations and vision of the plan?  
• Is the masterplan deliverable / feasible?  
• Is the timing of the programme for delivery realistic?  
• Will the proposals be phased, if so how?  
• Does the proposed phasing scheme provide the most appropriate approach?  
• Is there a realistic expectation based on funding levels available?  
• Has there been an assessment of the likely scale and allocation of infrastructure costs? How are these to be phased throughout the delivery and implementation of the proposals to ensure that the timely provision of essential features and infrastructure are provided?  
• Is the masterplan accompanied by an explanation of how it can be delivered by different parties on a phased basis?  
• Is it evident that good urban design principles have been incorporated within the masterplan?  
• Does the masterplan demonstrate a high level of integration between its constituent parts and within its wider setting?  
• In situations where there are adjacent masterplans, how well do they integrate – who takes the lead in drawing them together?  
• How are new communities to integrate with existing ones?  
• Has there been effective community / stakeholder engagement and participation?  
• Have any key stakeholders, such as utilities and services, been involved in the progression of the design solution? |
| SITE AND AREA APPRAISAL    | • Is there evidence of a full site analysis i.e. context, identity and connection / links to the wider area?  
• Has there been a thorough analysis of the site, its setting and its history, that evidently informs the masterplan’s development?  
• Has a contextual analysis been carried out, and has this informed the development of the masterplan? |
### Site and Area Appraisal (Continued)

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<td><strong>Will the need for re-engineering of landform (flattening, mounding, etc.) be minimised?</strong></td>
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<td><strong>Have significant natural features and other biodiversity been protected and intrusion minimised, as appropriate?</strong></td>
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<td><strong>Does the masterplan integrate and/or enhance surrounding habitats and landscape character?</strong></td>
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<tr>
<td><strong>Will there be opportunities to improve habitats and support wildlife, both on the fabric of the buildings and in the spaces between?</strong></td>
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<td><strong>Has the masterplan fully considered the natural hydrology of the area, including any permanent or ephemeral watercourses (watercourses that do not have surface water flow for the entire year. They are also called: seasonal, intermittent, episodic or temporary watercourses), and made provision so that these may be retained where possible?</strong></td>
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<td><strong>Have sustainable drainage systems been considered from the earliest stage?</strong></td>
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<td><strong>Has waste been addressed – both in terms of collection and waste minimisation in construction? Can any of the sites existing materials, i.e. soil / rubble be re-used?</strong></td>
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### Built Form and Character

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<td><strong>Does the design make the most of the specific qualities of the site or its unique location?</strong></td>
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<td><strong>Is the masterplan driven by a ‘standards approach’, or has sufficient emphasis been placed on recognising the unique positive qualities of a site to arrive at a distinctive design solution?</strong></td>
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<td><strong>Is the masterplan a possible candidate for A&amp;DS Design Forum or Council review panel?</strong></td>
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<td><strong>Does the masterplan integrate with its wider context?</strong></td>
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<td><strong>Will the development’s landscapes, natural features, buildings, street patterns, spaces, skylines, building forms and materials be likely to enhance the sense of identity?</strong></td>
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<td><strong>Will the proposals help to create a place with a distinctive character?</strong></td>
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<tr>
<td><strong>Do the proposals make the most of existing buildings, landscape and topography?</strong></td>
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<tr>
<td><strong>Is the landscape treated as an integral part of the design process?</strong></td>
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### Movement

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<td><strong>Are the proposed streets defined by a coherent and well-structured layout?</strong></td>
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<td><strong>Is the masterplan unduly influenced by transport considerations at the expense of both pedestrian movement and the quality of the public realm or will the streets be pedestrian, cycle and vehicle-friendly?</strong></td>
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<td><strong>Will the scheme integrate with existing roads, paths and surrounding development?</strong></td>
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<td><strong>Will a network of continuous routes be created and will public spaces, roads and footpaths be connected into well-used routes?</strong></td>
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| MOVEMENT (CONTINUED) | • Has the masterplan considered green networks in and around the proposed development area, and made provisions to connect to these or enhance their value?  
• Will the development have easy access to public transport?  
• Will areas with the highest densities be located where access to public transport is greatest?  
• Will public transport facilities be well-connected and safe?  
• Will there be provision for and promotion of a range of transport options?  
• Will the building layout take priority over the roads and car parking, so that highways do not dominate?  
• Will car parking be well-integrated into the street scene?  
• Has the proposed location of facilities such as local services, shops and schools been considered in relation to their catchments, and are there safe, convenient access routes for the communities they will serve? |
| --- | --- |
| PUBLIC REALM | • Is it evident how high quality public spaces can set the standard for further development, and act as a catalyst to encourage wider investment?  
• Has the design of the public spaces taken into account climatic considerations?  
• Could the proposed design of the public realm be improved?  
• Does the public realm integrate with areas beyond the areas covered by the masterplan?  
• Are public and private spaces well defined?  
• Is public space well designed, and are suitable management arrangements proposed that will be maintained throughout the phased delivery and beyond completion of the project? |
| SAFE AND INCLUSIVE | • Will buildings and layout make it easy for people to find their way around?  
• Will new landmarks or gateways be created, helping people to find their way around?  
• Will the development provide (or be close to) community facilities, such as a school, park, play areas, shops, pubs or cafes?  
• Will the development have active frontages (street frontages where there is an active visual engagement between those in the street and those on the ground floors of buildings. This quality is assisted where the front facade of buildings, including the main entrance, faces and opens towards the street. (David Lock Associates)) to streets?  
• Will all routes and public spaces be overlooked and feel safe?  
• Will the proposed uses encourage activity at all times of day?  
• Will routes and spaces be safe? |
**SUSTAINABLE**

- Will the proposals contribute to creating a sustainable place by including a range of features that reduce its environmental impact and carbon footprint, e.g. through sustainable design (renewable energy technologies, adaptable buildings, etc.), transport links, green networks?
- Is sustainability a guiding principle of the proposals?
- Does the proposed form of development take full advantage of climatic conditions, orientation, shelter and aspect?
- Have opportunities been taken to incorporate biodiversity features (such as green roofs) into the fabric of the buildings and into the spaces between them?
- Will there be a tenure mix that reflects the needs and aspirations of the local community?
- Will there be opportunities to make buildings and areas adaptable to a variety of future uses and changing circumstances through adaptation, extension or conversion?
- Will building materials be sourced from local or other sustainable sources?
- Will development make use of advances in construction or technology that will enhance its energy performance, biodiversity value, quality and attractiveness?
- Will buildings or spaces meet or exceed the requirements set out in policy OP1 in respect of carbon reductions?
Appendix 3: Summary of Process of Submission and Consideration

The purpose of masterplans is to guide the future development of the site. As a result they should be produced prior to the production of a detailed proposal. Ideally they should be submitted for consideration by the Council prior to applications coming forward. However it is accepted that the majority of masterplans will be submitted as part of the formal planning application process and therefore the following will apply:

1. Early discussions with planning authority to agree content and level of detail required in the masterplan and highlight content of masterplan brief where available
2. Submit masterplan to the Council for early consideration and assessment
3. Major applications: masterplan forms part of Planning Application Notice (PAN) for early community engagement
4. Local applications: masterplan submitted with application
5. If masterplan considered to be acceptable: Agreed as part of determination of application by condition
6. If masterplan considered to be acceptable: Agreed as part of determination of application by condition
7. If masterplan considered unacceptable
   a. Masterplan amended to take account of comments
   b. Planning application may be recommended for refusal