

Investor Brief (Redacted Sample)

Institutional-grade planning route mapping, uplift options, and entitlement risk underwriting.

Redacted sample: client, address, and commercially sensitive details removed.
Use this to understand output structure and decision-grade clarity.

Prepared for: **Investment Committee / Acquisition Underwrite**

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Sample document. Planning outcomes are at the discretion of the Local Planning Authority. Do not rely on this sample for investment decisions.

1. Executive Summary

Asset	Redacted inner-urban residential asset (constrained context)
Current use	Single dwelling / low-density baseline
Objective	Create multiple self-contained units while protecting saleability
Primary route	Full planning recommended (hybrid route assessed)
Key constraints	Amenity / daylight, heritage/conservation controls, highways/parking, services, CIL/S106 exposure
Decision window	Critical DD window requires early red-flag clearance and precedent scan

Executive Go / No-Go

Go **subject to** (i) precedent alignment, (ii) daylight/sunlight compliance, and (iii) conservation officer risk mitigation.

If these are not achievable within DD, do not proceed without renegotiation or revised strategy.

Decision points we resolve in the Audit:

- Is the target use/intensification supported by policy and precedent in this micro-location?
- Is PD available or constrained by Article 4 / conservation controls?
- What are the top 3 refusal risks — and what evidence/design moves neutralise them?
- What is the fastest consent route that preserves saleability and valuation?

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2. Planning Route Map & Uplift Options

We compare PD vs Full Planning vs Hybrid approaches and recommend the route with the best probability-weighted value.

Option	Route	What it unlocks	Probability	Time-to-consent
A (Baseline)	Light-touch / compliant layout	Lower uplift; highest certainty	High	8–12 weeks
B (Target)	Full planning + evidence pack	Target unit mix & saleability	Med–High	12–20 weeks
C (Stretch)	Hybrid / intensified scheme	Maximum uplift; higher scrutiny	Medium	16–28+ weeks

Recommended approach (sample): Option B — Full Planning + evidence pack

- Aligns to conversion standards and conservation-area expectations (where applicable).
- Supports valuation and exit narrative (unit quality, compliance, saleability).
- Maintains fallback if specific design elements face officer resistance.

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3. Constraint & Policy Matrix (Redacted Sample)

We translate constraints into actions: what to check, what evidence is needed, and what design moves reduce refusal probability.

Constraint	What it means	Evidence / Action
Conservation Area / Heritage	Higher scrutiny on materials, massing, and facade changes.	Heritage statement; conservation-led design; early dialogue; precedent imagery.
Amenity / Neighbour Impact	Privacy, outlook, noise, refuse/cycle stores may trigger objection.	Window strategy; privacy measures; acoustic report; refuse/cycle compliance.
Daylight / Sunlight	Internal quality and neighbour impact can be decisive.	Early modelling; layout optimisation; massing controls; reduce unit count if needed.
Highways / Parking	Parking stress objections and servicing logistics.	Car-free strategy where viable; compliant cycle storage; servicing plan; highways pre-check.
CIL / S106	Potential financial drag on feasibility.	CIL check; scenario test; relief/exemptions review; align to viability.
Fire / Building Regs	Conversion triggers fire strategy and layout constraints.	Early fire strategy; means-of-escape coordination; PCMA technical pack readiness.

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4. Critical Path & Budget Bands (Sample)

We set expectations on what needs doing, in what order, and the indicative cost bands to get from underwrite to consent and delivery.

Critical path (typical):

- Week 0–1: baseline checks, planning history, Article 4 / constraints scan.
- Week 1–3: concept design & layout tests; early officer sensitivity checks.
- Week 3–6: surveys & statements (heritage, daylight, acoustic, transport as needed).
- Week 6–8: submission readiness; final design freeze; application pack.
- Determination: 8–12 weeks (statutory) + negotiation buffer.
- Post-consent: conditions discharge, technical pack, tendering, and delivery sequencing.

Budget bands (indicative):

- Planning & design team (pre-consent): £10k–£35k+ depending on complexity and evidence requirements.
- Authority costs (application fee, potential CIL): case-dependent; confirm early.
- Post-consent delivery (PCMA): building regs drawings, tender pack, CGI/marketing — scoped and priced after consent route is confirmed.

Next steps (sample): confirm route choice, commission priority surveys, and align design to the top 3 refusal risks. If appointed, we manage the planning submission and remain through execution and exit support.