

Affordable Housing Statement

In respect of:

**Land at Whalley
Road, Barrow**

Barrowlands, Phase 2

Prepared by:

Pioneer Property Services Ltd

On behalf of:

**Barratt & David Wilson Homes
North West**

And

Taylor Wimpey North West

Date:

9th January 2019



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1 Introduction

- 1.1 This Statement accompanies an application for full planning permission in relation to the residential development of land at Whalley Road, Barrow also known as Barrowlands phase 2 ("the application site") to provide 233no. dwellings in total.
- 1.2 The application is being submitted jointly on behalf of Barratt & David Wilson North West ("BDW") and Taylor Wimpey North West ("TW").
- 1.3 The application site benefits from an outline consent granted in 2013 and a reserved matters consent granted in 2017 for 225 dwellings. The Council consider that the original outline consent has expired and therefore a full application is now required.
- 1.4 Whilst a new full application is being submitted it has been agreed with the Council that this application will be linked to the existing legal agreements (dated 24th June 2013 and 10th July 2017) through a linked agreement or supplemental agreement thus meaning that the main obligations in relation to affordable housing will also relate to the full application.
- 1.5 The affordable housing obligations contained within the existing legal agreements state that the affordable housing shall consist of not less than 30% of the total number of dwellings and that 15% of the overall number of dwellings will be provided as Elderly Person Units of which half should be provided within the affordable housing provision.
- 1.6 The following section sets out appropriate affordable housing proposals in respect of the application site, having regard to the overarching policy context and the existing obligations. Section three details a number of changes required to the planning agreement in order to deliver the affordable housing satisfactorily. The final section of this Statement presents conclusions.

2 Affordable Housing Proposals

2.1 Overall percentage of affordable housing

- 2.1.1 The proposed affordable housing provision equates to 30% of the total number of dwellings provided on the application site in line with the existing legal agreements. This equates to 70no. dwellings in total of which 36no. will be provided by BDW and 34no. by TW. The affordable housing dwellings are identified on Planning Layout Drawing Ref.

DWH/WRB/SL/01 and the associated house type layout plans submitted alongside the application.

- 2.1.2 The development will greatly assist the Council with the supply of housing during the current plan period providing much needed market and affordable housing.

2.2 Tenure

- 2.2.1 The existing legal agreements allows for the following tenures to be provided:

- Social Rented Housing defined as a dwelling let on an assured tenancy at a level of rent not above the Rent Restructuring Regime prevailing at the time the site is transferred to a Registered Provider.
- Shared Ownership defined as a dwelling for sale whereby the occupier is required to purchase a minimum equity share in the dwelling and will then have the option to purchase additional equity to a maximum of eighty per cent.
- Affordable Rented Housing defined as a dwelling with the same characteristics as Social Rent but is let outside of the national rent regime.
- Any other scheme approved by the Council.

- 2.2.2 The existing legal agreements do not specify the tenure split to be provided and it has therefore been agreed with the Council's housing officer that the affordable housing will be provided with a 1/3rd Affordable Rent and 2/3rd Shared Ownership split i.e. 33.3% Affordable Rent and 66.7% Shared Ownership.

- 2.2.3 A number of minor amendments are required to the existing legal agreement definitions in order to provide clarity for the preferred Registered Provider and the applicants, these are detailed within Section 3 of this Statement.

2.3 Dwelling Mix

- 2.3.1 At this stage discussions are ongoing with the preferred Registered Provider as to which dwellings are provided for Affordable Rent and Shared Ownership, whilst maintaining the tenure split, however the current proposals are set out in the following tables:

BDW:

Type	Affordable Rent	Intermediate	Total
1-Bed Bungalow	6	4	10
2-Bed House	6	17	23
3-Bed House	0	3	3
Total	12	24	36

TW:

Type	Affordable Rent	Intermediate	Total
1-Bed Bungalow	3	5	8
2-Bed House	3	10	13
3-Bed House	5	8	13
Total	11	23	34

- 2.3.2 The dwelling mix proposed provides a good mix of 1, 2 and 3 bedroom houses and bungalows. It is proposed that the 1-bed bungalows will be allocated as the Elderly Persons Units.

2.4 Phasing

- 2.4.1 In line with the existing legal agreements no more than 25% of the market dwellings will be completed prior to a Registered Provider being secured.
- 2.4.2 Given the pepper-potted nature of the affordable housing within the development it is proposed that the affordable housing will be completed and transferred to the Registered Provider prior to occupation of the final market dwelling.

2.5 Nominations

- 2.5.1 The existing legal agreements require the following in relation to nominations:

- Affordable Rent – the Council will be allocated 100% nominations arrangements to approved persons nominated by the Council in accordance with the Council's allocations policy.
- Shared Ownership – the Registered Provider will sell the dwellings to approved persons who meet the occupancy criteria.
- Discounted Market – BDW and TW will sell the dwellings to approved persons.

2.5.2 A number of minor amendments are sought to the nomination provisions in order to provide clarity for the Registered Provider, these are detailed in Section 3 of this Statement.

2.6 Distribution and Standards

2.6.1 The location of the affordable dwellings is shown within the Planning Layout Drawing Ref. DWH/WRB/SL/01 submitted in support of this application.

2.6.2 The size of the affordable dwellings proposed by BDW and TW are as follows:

Type	BDW (sqft / sqm)	TW (sqft / sqm)
1-Bed Bungalow	540 / 50.2	545 / 50.6
2-Bed House	750 / 69.7	771 / 71.6
3-Bed House	926 / 86.0	910 / 84.5

2.6.3 Detailed discussions have taken place with the preferred Registered Provider and they have confirmed the dwelling sizes are acceptable.

2.6.4 The affordable housing will be constructed in accordance with the relevant Building Regulations.

3 Changes required to existing planning agreement

3.1 Following detailed discussions with the preferred Registered Provider it will be necessary for the linked or supplemental agreement to incorporate a number of amendments in order to make it possible to dispose of the affordable housing. These points have been raised and

discussed with the Council's housing officer and it is understood that they are agreed in principle subject to the drafting being agreed. The points include:

3.1.1 Definitions

- 3.1.1.1 It is proposed that the definitions will be updated to provide clarity on the specific requirements for each tenure as the current definitions are somewhat confusing and in places contradictory.
- 3.1.1.2 The Affordable Rent is stated as being no more than the maximum rent in Barrow, shall be no more than the local housing allowance rate and will be in accordance with the Government Guidance on Affordable Rent. Clarity on the specific requirements are required particularly in light of the national policy that has been published since the existing planning agreements were signed.
- 3.1.1.3 The definition of Shared Ownership limits staircasing to 80% however staircasing is permitted up to 100% within the operative provisions of Schedule 1. The Registered Provider must have staircasing unrestricted in order to be able to sell the Shared Ownership dwellings.
- 3.1.1.4 Whilst it is intended to deliver the Shared Ownership units via a Registered Provider it is proposed that a definition will be incorporated to allow for Discounted Market Sale dwellings, confirming the level of discount applied and the eligibility/occupancy criteria, in the event that an RP cannot be secured.

3.1.2 Nominations

- 3.1.2.1 The existing legal agreement includes provision for 100% nominations for the Affordable Rent dwellings however no clear guidance is provided on how this is to operate or what happens in the event that the Council do not have suitable nominees. Ideally a nominations agreement will be provided or the specific provisions included within the supplemental agreement.
- 3.1.2.2 Further clarity is also required on the Shared Ownership Occupancy Criteria and the allocation mechanisms that are to be operated.

3.1.3 Mortgagee in possession clause

- 3.1.3.1 A definition of Mortgagee needs to be included to define who benefits from the mortgagee in possession provisions and a timescale needs to be included in relation to any disposals occurring under the clause. The amendments are required to enable the Registered Provider to charge the affordable dwellings. Suitable wording to cover this point will be provided for the Council's consideration.

3.1.4 Elderly persons units

- 3.1.4.1 The existing planning agreements require the Elderly Persons Units to be subject to a restriction limiting the main occupier to a person with a minimum age of 55 years of age. It would be preferred if this could be extended so that the dwellings could also be occupied by those that have a disability and require a bungalow even if they are under the age of 55 years.
- 3.2 A draft supplemental deed will be provided to cover these points for the Council's consideration as part of the planning application.

4 Conclusion

- 4.1 The application proposals have been prepared having regards to national guidance and local plan policy requirements and the existing affordable housing obligations.
- 4.2 The proposals are in line with the existing legal agreements to provide 30% affordable housing.
- 4.3 The residential development of the application site will provide 233no. dwellings in total, of which it is proposed that 70no. affordable dwellings will be provided.
- 4.4 The affordable housing being provided has been discussed with the preferred Registered Provider and is acceptable to them.
- 4.5 The proposed level of affordable housing provision will be of significant benefit in assisting the Council with addressing local affordable housing need, and the development of the application site will provide both affordable and market housing that will assist the Council with delivering a supply of housing land during the current Plan period.