### List of Acronyms/Abbreviations Commonly Used

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A glossary containing definitions of all these terms is included on page 22.
Regional Spatial Strategy (RSS) - Currently being prepared for the period 2006 to 2026 that will set out the regional plan for development within the South West.

Registered social landlord (RSL)/Housing association (HA) - A not for profit organisation, usually a housing association, registered by the Housing Corporation to provide affordable housing.

Rural exception schemes - Small scale housing schemes for permanent affordable housing to meet a local need within or adjoining the boundaries of villages permitted as an exception to normal planning policy.

S106 agreement - A legal document binding developers and the Council into carrying out specific works or payments of money that are necessary to allow the development to go ahead.

Secured by Design (SBD) - A Police flagship initiative supporting the principles of “designing out crime”. It uses effective crime prevention and security standards for a range of applications including individual houses and residential sites. Schemes are certified by the Police architectural unit.

Service level agreement - An agreement between the Council and RSLs developing, or proposing to develop, in South Gloucestershire. It provides a framework for the partnership working between South Gloucestershire Council and RSLs operating in South Gloucestershire, specifically in relation to the operation of a common housing register and the allocation of social rented housing.

Shared ownership (New build homebuy) (NBHB) - A form of affordable housing which is partly sold and partly rented to the occupiers

Social rented housing - Rented housing, owned and managed by local authorities and registered social landlords (RSLs), for which guideline target rents are determined through the national rent regime. It may also include rented housing owned or managed by other persons and provided under equivalent rental arrangements to the above, as agreed with the local authority or with the Housing Corporation as a condition of grant.

South Gloucestershire Housing Partnership (SGHP) - A partnership between the Council and RSLs developing, or proposing to develop in South Gloucestershire, which have been selected according to a competitive process on the basis of their good management practice, and which the Council will support in their bids to the Housing Corporation for Social Housing Grant.

South Gloucestershire Local Plan (SGLP) - A document that sets out the current adopted local planning policies for the South Gloucestershire to 2011

Strategic Housing Market Assessment (SHMA) - An assessment of the estimated demand for market housing and need for affordable housing in a defined geographical area, in terms of distribution, house types and sizes and the specific requirements of particular groups and which considers future demographic trends.

Supplementary Planning Document (SPD) - A document that supplements and elaborates on policies and proposals in development plan documents.

Sustainability appraisal (SA) - An appraisal of the social, environmental and economic effects of the strategies and policies of a local development document from the outset of the preparation process. It incorporates the requirements of the European Environmental Assessment Directive.

Target rents - Guideline rents for social rented housing, determined through the national rent regime contained in the Three Year Review of Rent Restructuring which became policy in April 2006. They are calculated with reference to local incomes and house prices.

West of England - A sub-region which encompasses the administrative areas of South Gloucestershire Council, Bristol City Council, Bath and North East Somerset Council and North Somerset Council.

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Housing Quality Indicator (HQI) - A measurement and assessment tool designed to allow housing schemes to be evaluated on the basis of quality rather than simply of cost. The HQI assesses the quality of a housing project using three main categories: location, design and performance. These are subdivided into ten sections - the indicators. An HQI assessment generates separate scores for each indicator producing a profile of the scheme, and an overall HQI score. The system was developed on behalf of the Department for Transport, Local Government and the Regions (now Communities and Local Government) and the Housing Corporation.

Housing Strategy 2004 - 2009 - The Council’s detailed proposals to address the housing needs of the whole community in the South Gloucestershire area.

Intermediate affordable housing - Affordable housing which is defined in PPS3 as being at prices and rents above those of social rent but below market prices or rents and which can include shared equity products (e.g. HomeBuy), shared ownership, discounted sale and intermediate rented homes.

John Herington Associates Housing Needs Survey (JHAHNS) - A study commissioned by South Gloucestershire Council to identify the current and future housing needs within the district to help develop the Council’s housing strategy and local plan. The findings were reported in March 2004.

Key workers - Defined by the Government as those eligible for the Housing Corporation funded Key Worker Living programme and others employed in the public sector identified by the Regional Housing Board.

Lifetime homes standard - A standard of housing established by the Joseph Rowntree Trust which would enable someone with physical or sensory impairment to live comfortably in their home or for the home to be easily adapted to meet their needs.

Local Development Document (LDD) - Sits within the LDF portfolio and comprises Development Plan Documents (DPDs) that have been subject to independent testing and have the weight of development plan status, and Supplementary Planning Documents (SPDs) which are not subject to independent testing and do not have development plan status.

Local Development Framework (LDF) - The Local Development Framework is replacing the previous development plan system and contains detailed policies and proposals to guide development in South Gloucestershire.

Local Development Scheme (LDS) - The Local Development Scheme explains how and when South Gloucestershire Council will be producing its Local Development Framework.

Local Plan Inquiry (LPI) - Between June 2003 and September 2004 a public local inquiry, chaired by an independent Government planning inspector, was held into objections to the South Gloucestershire Local Plan. The Inspectors Report was subsequently received in November 2004 and published in December 2004. Following consideration of the inspector’s recommendations and a period of modifications the SGLP was adopted in January 2006.

Market housing - Private housing for rent or for sale, where the price is set in the open market.

Planning Policy Statement 3 (PPS3) - Planning Policy Statement 3: Housing sets out the national planning policy framework for delivering the Government’s housing objectives, including those for affordable housing.

Regional Housing Body - The Regional Housing Body sets priorities for housing investment in the South West.

Regional Planning Guidance number 10 (RPG10) - Provides the regional framework within which local authority development plans and local transport plans in the South west should be prepared. RPG10 now forms part of the legal development plan and is known as the Regional Spatial Strategy for the South West.
1. Status

This Affordable Housing Supplementary Planning Document (SPD) is a Local Development Document, prepared in line with the provisions of the Planning and Compulsory Purchase Act 2004; and The Town and Country Planning (Local Development) (England) Regulations 2004. It forms part of the South Gloucestershire Local Development Framework (LDF), along with the Adopted Local Plan and other emerging local development documents.

The SPD is consistent with the existing affordable housing policies H6 and H7 of the adopted South Gloucestershire Local Plan 1996 to 2011 (SGLP). The SPD was adopted by South Gloucestershire Council on 2 September 2008 and replaces the Council’s existing Draft Affordable Housing Supplementary Planning Guidance (2002). As a Supplementary Planning Document, it will be a material consideration in the determination of planning applications, alongside other documents in the LDF.

2. Introduction

The SGLP includes policies H6 and H7 that relate to the provision of affordable housing through the planning process. The purpose of this SPD is to advise all involved in the delivery of affordable housing, from applicants to Council officers, on how the Council will apply the policies of the SGLP to improve the delivery of affordable housing, by:

- Providing clarity to existing Local Plan affordable housing policies;
- Providing a summary of national, regional and local plan policies relating to affordable housing;
- Clarifying the definition of affordable housing;
- Outlining the Council’s preferred methods for ensuring the delivery of affordable housing;
- Setting out the Council’s affordable housing monitoring targets to be included in the Annual Monitoring Report.

12. Glossary

Affordable housing - Housing provided, with subsidy, for local people who are unable to resolve their housing needs in the open market because of the relationship between housing costs and income.

Affordable Housing Manager - An organisation which may or may not be a Registered Social Landlord but whose management standards are acceptable to the Council and which manage affordable housing transferred to it by a AHP or RSL.

Affordable housing providers (AHPs) - Providers of affordable housing which are not necessarily Registered Social Landlords but will deliver the affordable housing on site.

Annual monitoring report (AMR) - Information on the implementation of the policies of the Local Development Framework (LDF).

Code for sustainable homes - A new national standard for sustainable design and construction of new homes. Since April 2007 the developer of any new home in England can choose to be assessed against the Code. The Code uses a 1 to 6 star rating system to communicate the overall sustainability performance of a new home.

Delivering Affordable Housing (DAH) - A companion document to PPS3, published by DCLG in November 2006, which provides more detailed guidance on the delivery of affordable housing.

Department for Communities and Local Government (DCLG) - The Government department with specific responsibility for communities and local government, covering planning, housing and regeneration.

Design and quality standards - The Housing Corporation’s standards for affordable housing, which apply from 1 April 2008 and replace the previous Scheme Development Standards.

Dwelling - A dwelling is defined (in line with the 2001 Census) as a self-contained unit of accommodation. Self-containment is where all rooms (including kitchen, bathroom and toilet) in a household’s accommodation are behind a door which only that household can use. Non-self contained household spaces at the same address are counted together as a single dwelling. Therefore a dwelling can consist of one self-contained household space or two or more non-self contained household spaces at the same address.

Enabling strategy - The Council’s strategy for meeting the needs and aspirations of the people of South Gloucestershire for affordable homes.

ExtraCare - Self-contained accommodation which provides flexible care and support arrangements to meet the increasing needs of people whilst enabling them to stay in their homes as they get older. (Department of Health, Care Services Improvement Partnership, Housing Learning and Improvement Network: Fact Sheet 6 – Design principles for ExtraCare.)

HomeBuy agents - RSLs appointed by the Housing Corporation for a Housing Market Area to market intermediate housing to eligible households.

HomeChoice - The Council’s choice based lettings system. The Council’s waiting list of applicants is known as the HomeChoice Register. (http://homechoice.southglos.gov.uk)

HomesWest - A partnership of four RSLs selected by the four local authorities of the West of England to develop strategic and other large sites in the West of England area.

Housing Corporation - An organisation set up by the Government to regulate the activities of RSLs/HAs and administer the subsidy (known as Social Housing Grant) help them develop new affordable homes.

Housing Needs Survey (HNS) - Study to assess the level and type of housing need in South Gloucestershire.

Housing needs register/Housing waiting list - A register of all households seeking affordable homes in South Gloucestershire.
The Local Plan forms part of the Development Plan and to ensure the transition between policies in the Local Plan and the Local Development Framework (LDF), Local Plan policies including H6 and H7 are “saved”.

This document is not intended to provide guidance on the forthcoming Core Strategy to be produced by the Council. These policies will receive more detailed guidance in a future Affordable Housing SPD to be produced by the Council at a later date.

SPDs do not have the same status as Development Plan Documents and therefore do not need to be subject to independent examination. However, very similar procedures of community involvement and Sustainability Appraisal are still required.

2.1 Aims and Objectives
The planning system aims to develop stable, balanced communities where all sections of society, regardless of their wealth, occupation or background, feel included (PPS3 Para 9). Planning for adequate and appropriate affordable housing plays a central role in maintaining an inclusive society. Good design and siting of affordable housing within residential and mixed-use developments creates vibrant, interesting and engaging communities in which to live and work.

In addition to the above, the Council has produced its Sustainable Community Strategy, which sets out the Council’s priorities until 2026, amongst which is that of managing future development. In relation to future housing development, the Council plans to meet the housing needs of existing and future residents and to enable an adequate supply of affordable and supported housing, ensuring that all new developments deliver the number, type and range of affordable housing required. The Housing Strategy 2008 - 2013, which gives more detail to these plans, states that its top priority is to meet the need for affordable homes. This SPD is a key document in the delivery of affordable housing.

3. Planning Context
Government advice outlined in Planning Policy Statement 3 (PPS3) Housing (November 2006) provides the context for the delivery of affordable housing. The objectives can be summarised as follows:

The provision of adequate housing at a price that people can afford and in a community where people wish to live is one of the keys to delivering sustainable development. Housing is one of the biggest users of development land and the planning system if tasked with delivering well designed, high quality housing, a mix to accommodate a wide variety of households, a flexible land supply to ensure a sufficient quantity of housing, and locations which have good access to jobs, services and infrastructure and offer a range of community facilities. PPS3 highlights the Government’s continuing commitment to provide affordable housing.

Further Government advice and guidance on the delivery of affordable housing is contained in the companion publications to PPS3, Delivering Affordable Housing (Department for Communities and Local Government (CLG), November 2006) and Strategic Housing Market Assessment Practice Guidance Version 2 and Annexes (CLG, August 2007).

Regional Planning Guidance (RPG 10) for the South West Policy H03 states that:

“Local Authorities, social housing providers and other agencies in their relevant

contain provisions to ensure that the developer enter into contract with the RSL or AHP and transfers the affordable housing before the relevant percentages of permitted dwellings have been completed.

10.9 Committee reports
Where planning permission is sought for a proposal that requires the provision of affordable housing, officers will prepare a report to the relevant committee which states how the affordable housing is to be secured.

10.10 Legal agreements
Pre-application discussions are greatly encouraged. The Council’s Statement of Community Involvement (SCI) sets out its approach to consultation. Chapter 4 deals specifically with consultation on Planning Applications. Early negotiation, resolution and drafting of the legal agreement is also encouraged (PPS3 Annex C: Para 50). The terms and obligations for the delivery of the affordable housing, including trigger points and monitoring requirements, will be set out in a legal agreement made between the owner of the land and the Council.

11. Monitoring and Review
The Government expects local authorities to monitor the provision of all housing provision through the planning system. Under the Planning and Compulsory Purchase Act 2004, this will take place as part of the Annual Residential Land Availability Survey and Annual Monitoring Report (AMR). The Council already monitors affordable housing completions, by tenure and whether delivered through the planning process or publicly funded. Subsidy details are recorded. The results are made publicly available through the AMR and published performance indicators.

The Council will actively monitor the provision and delivery of affordable housing to ensure that the procedures for implementing affordable housing are up to date and meeting the Council’s targets. The AMR will identify the key challenges and opportunities for the provision of Affordable Housing and revisions to be made. Market conditions and levels of affordability will also be kept under review.

The Council will monitor the management obligations of our preferred partner RSLs and will, from time to time, review our preferred partners to ensure high standards of service delivery. In particular, the Council will require annually, from the RSL or other affordable housing manager, information relating to:

- Target rents
- Rent increases
- Staircasing and other sales receipts
- Management standards

Developers’ delivery partners, whether RSL or other provider/manager (AHP/ AHM), will be similarly monitored in relation to specific sites through the obligations contained in legal agreements.

This guidance will be kept under review in the light of all future material information and guidance.
The Council’s preference is for affordable housing delivery by one of its partner RSLs but, consistent with the guidance in Delivering Affordable Housing (CLG 2006), will not prescribe which organisation the developer chooses to work with (DAH Annex C: Para. 48). A developer may wish to work with a RSL which is not in partnership with the Council, or with another, unregistered affordable housing provider. Whichever provider is chosen, it is advisable for the developer to involve them at the earliest opportunity, ideally before the design stage (DAH Annex C: Para. 50).

10.6 Affordable Housing Manager

Where it is intended that the affordable housing units will be transferred upon completion to a RSL which is not a partner of the Council or to another, unregistered affordable housing manager, the Council will require evidence of acceptable management standards and may reject a provider and/or manager where the standards cannot be shown to be met (see Appendix 5: Management Standards). An obligation to meet the management standards set out in Appendix 5 will be included in the legal agreement. (see also DAH Annex C: Para. 49)

10.7 Retention of affordable housing

The Council’s intention is to provide affordable housing which is retained as such for as long as it is needed. Policy H6 states, in part “Permission will be subject to conditions or a planning obligation will be negotiated to ensure such housing is reserved for first and subsequent occupiers who need it.” The definitions of affordable housing in both PPS3 and DAH state:

“Affordable housing should: Include provision for the home to remain at an affordable price for future eligible households or, if these restrictions are lifted, for the subsidy to be recycled for alternative affordable housing provision”

(PPS 3 Annex B: Definitions; DAH Annex B: Definitions and types of affordable housing).

- Social rented housing, which is delivered without public subsidy is exempt from the requirements of the Right to Acquire. If subsequent legislation overrides this exemption, any capital receipts resulting from sales will be recycled to provide affordable housing in South Gloucestershire.

- Intermediate housing may be lost as affordable housing through staircasing to full ownership. In order to be able to replace it, the Council will require net capital receipts to be recycled towards the provision of additional affordable housing in South Gloucestershire. The mechanism is set out in Appendix 7. This will also be required in the case of social rented housing sold through the Right to Acquire, where it applies. (DAH Paras 19, 40, 71, 72)

- Rural affordable housing. Certain rural areas are exempt from the Right to Acquire, through the provisions of Statutory Instrument 1997 No. 621, which identifies the exempt parishes of South Gloucestershire. Shared ownership intermediate housing may be subject to a staircasing limit, e.g. 80% equity, to prevent its loss through outright sale. Affordable housing on Rural Exception sites will be subject to obligations in a legal agreement which limit occupancy to those with a local connection but with a cascade approach to widen the area of connection in order to retain it as affordable housing.

10.8 Phasing

Developers should ensure that the affordable housing is delivered no later than the market housing. This will be ensured through the legal agreement, which will plans, policies and programmes should aim to ensure that sufficient affordable housing is provided in order to meet community needs in both urban and rural areas. This should include, among other things, the identification of targets in development plans indicating the levels of affordable housing required in each area; these should be based on local housing needs assessments undertaken to consistent standards across the region, which take into account both need and supply side considerations.”

RPG10 confirms that the need for affordable housing across the Region is expected to remain significant. The current estimate of need for affordable housing in the South West is 6,000 to 10,000 units a year. This equates to between 30% and 50% of all new housing provision over the period 1996 to 2016.

The Regional Spatial Strategy (RSS) for the South West will eventually replace RPG10 and provides the regional strategic planning framework. The Draft RSS emphasises the high level of need for affordable housing in the region and refers to the importance of the planning system in helping to provide it. Policy H1 of the Draft RSS identifies that within the 23,000 dwellings per annum required for the region, at least 7,500 affordable homes will need to be provided in the period to 2026. This equates to at least 30% of all housing developments annually across each local authority area and Housing Market Area to be affordable, with authorities specifying rates up to 60% or higher in areas of greatest need. The Panel Report following the Examination in Public (EIP) to the Draft RSS published in January 2008 regards the general approach to affordable housing within the Draft RSS to be acceptable. The report suggests that: “...within the 28,000 dwellings per annum (at least) required for the region, the aim should be to provide at least 10,000 homes per annum in the period to 2026...”. This equates to at least 35% of all housing. Applicants are advised to contact the Council at the time of application to confirm current status.

The SGLP policies are “saved” through the Local Development Scheme until they are replaced by new policies in a Local Development Document (LDD). This SPD seeks to give further guidance and advice only on the policies within the SGLP. It is, however, also written in the light of such material as current national, regional and strategic guidance and the Draft South Gloucestershire Sustainable Community Strategy.

Meeting the needs and ensuring a sufficient variety of house types and sizes to achieve mixed and balanced communities is a high priority for the Council. Across the Council a corporate approach is employed towards the provision of affordable housing. The Housing Strategy 2008 - 2013, together with the Enabling Strategy 2005/06 - 2009/10 and the Rural Affordable Housing Strategy 2007/08 - 2009/10 describe how the Council will use its enabling powers to meet housing needs in the area. A community’s need for affordable housing is a material consideration in preparing local planning policies and in determining planning applications.
4. Affordable Housing Policies

The policies with the supporting text to which this SPD relates are set out in Appendix 1. The policies themselves are also shown in the boxes below.

**POLICY H6: AFFORDABLE HOUSING**

THE COUNCIL WILL SEEK AN ELEMENT OF SUBSIDISED AFFORDABLE HOUSING TO MEET LOCAL NEEDS ON ALL NEW HOUSING DEVELOPMENTS OF 15 OR MORE DWELLINGS OR 0.5 HECTARE OR MORE, IRRESPECTIVE OF THE NUMBER OF DWELLINGS, (EXCEPT IN SETTLEMENTS IN RURAL AREAS WHERE THE THRESHOLD WILL BE 5 OR MORE DWELLINGS OR 0.2 OF A HECTARE).

ON THOSE SITES ALLOCATED IN POLICY H1, THE COUNCIL WILL NEGOTIATE WITH DEVELOPERS ON THE BASIS OF A TARGET OF 33.3% OF THE DWELLINGS PERMITTED.

ON “WINDFALL SITES”, NEGOTIATIONS WILL ALSO BE BASED ON A TARGET OF 33.3% OF DWELLINGS SUBJECT TO THE NEEDS OF THE AREA.

PERMISSION WILL BE SUBJECT TO CONDITIONS OR A PLANNING OBLIGATION WILL BE NEGOTIATED TO ENSURE SUCH HOUSING IS AVAILABLE TO FIRST AND SUBSEQUENT OCCUPIERS WHO NEED IT.

IN SEEKING TO NEGOTIATE THE MAXIMUM LEVEL OF AFFORDABLE HOUSING ON EACH SITE THAT IS FEASIBLE UP TO THESE TARGETS THE COUNCIL WILL HAVE REGARD TO THE ECONOMIC VIABILITY OF SITE DEVELOPMENT, LIKELY COSTS, EXISTING MARKET CONDITIONS, THE AVAILABILITY OF PUBLIC SUBSIDY AND THE AIM OF ACHIEVING BALANCED AND STABLE COMMUNITIES.

4.1 Threshold for providing affordable housing

**Urban areas**

The Council will require affordable housing as part of any development of 15 or more dwellings, or on a site that includes residential development and has a capacity of at least 15 dwellings or on a residential site with a gross area of at least 0.5ha. PPS3 (Paragraphs 10, 45–51, 69) makes it clear that new housing should make efficient use of land, which SGLP Policy H6 Paragraph 8.196 supports. Where land is used inefficiently to avoid having to provide affordable housing, this would be likely to lead to a recommendation of refusal of planning permission.

Where a proposal is just under the threshold e.g. 14 units (assuming that the site area is below 0.5 ha), the developer may be required to demonstrate, against the background of the requirements of Policy H2 paragraph 8.154 of the SGLP and other national policy guidance, that their proposed density makes efficient use of the land.

Should an outline application for residential development be proposed, the Council will assess the housing density that is appropriate to the site. If this is determined to be 15 dwellings or more, then the applicant will be expected to enter into a legal agreement to provide affordable housing, in line with Policy H6.

10.4 Viability

Applicants who cite non-viability as the reason for not complying with Policy H6 must support their case with sufficient evidence when submitting their planning application. When considering any viability arguments the Council will not take into account what the applicant has paid, or has agreed to pay, for the land when making its assessment. The assessment will be made having regard to the residual land value arrived at once all necessary costs of development have been deducted. Such costs will include those associated with any necessary planning obligations valid at the time of the application or any restrictions, encumbrances or abnormal ground conditions, all of which should be, or should have been, reflected in the purchase price. If, despite all reasonable investigations prior to purchase, abnormal conditions are subsequently discovered which render the scheme unviable, supporting evidence should be submitted to the Council, which will take it into consideration.

Economic viability will be assessed by the Council’s Property Services Department or an independent surveyor appointed as necessary, with the developer being liable for reasonable costs incurred by the Council. Confidentiality will be assured.

Supporting evidence required should be on open-book basis, should relate directly to the application site and include the following:

- Full development appraisal of scheme with estimates to support any quoted values/costs.
- Plan of development including gross and net sales internal areas of dwellings.
- Details of land purchase/option agreement etc with copy of contract.
- Reasoned justification for reduction in affordable housing provision.
- Evidence of any current use value.

The development appraisal should be made on the basis of:

- Provision on site of 33.3% affordable housing to comply with PPS3, SGLP Policy H6 and the requirements of this document and its impact on the viability of the residual land value; and
- Proposed provision which would make the scheme viable for the developer, supported by local market comparable evidence.

If the Council is satisfied that the financial appraisal confirms that the affordable housing requirement renders the scheme unviable, the Council can consider:

- a lower percentage of affordable housing but retaining the tenure split and unit mix; or
- retaining the target percentage but adjusting the tenure split or unit mix; or
- supporting the introduction of grant funding to achieve the target contribution (see para. 4.2); or
- a combination of these options, such that the scheme viability is restored.

10.5 Registered Social Landlord (RSL) / Affordable Housing Provider (AHP)

The Council is in partnership with RSLs of the South Gloucestershire Housing Partnership (SGHP), which delivers affordable housing within South Gloucestershire, and HomesWest, which has a strategic role in the West of England sub-region. Contact details of both partnerships are to be found in Appendix 10. The partnerships are due to be reviewed in 2009/10.
The Council will regard a developable site in its entirety for the purpose of implementing Policy H6. Para. 8.196 of the Policy states: “Where it is proposed to phase development, sub-divide sites or where there is a reasonable prospect of adjoining land being developed for residential purposes in tandem, the Council, will take the whole site for the purpose of determining whether the scheme falls above or below the thresholds.”

A planning application will be assessed to see whether it and/or the adjoining land has been subject to recent subdivision and if so, to what purpose. If the Council considers that the formerly subdivided land was produced within the last 5 years of completion of the principal site, both sites would be assessed as one for the purposes of applying Policy H6.

Conversions
Policy H6 also applies to the conversion of any building, including those in rural areas, whether or not it is already in residential use.

4.2 Proportion of affordable housing (Policy H6)
Where Policy H6 applies, the Council will require the provision of 33.3% of the proposed dwellings as affordable housing (PPS3 Para 29). Proposals not complying with Policy H6 and the provisions of PPS3 may lead to a recommendation to refuse planning permission. The applicant will be expected to enter into a legal agreement to provide 33.3% of the total number of dwellings on site as affordable housing, unless there is a robust justification for reducing this proportion because of impact on economic viability or other acceptable reason. If such a reduced proportion is agreed, the Council may seek the provision of additional affordable housing on the application site to make up for the reduction in affordable housing delivered through the planning process and may support an application to the Housing Corporation for the necessary funding (see Section 10 Ensuring Delivery of Affordable Housing).
Specialist residential development

Where schemes of specialist accommodation for purchase or rent on the open market are proposed and where the application triggers consideration under Policy H6 then officers will seek to maximise the provision of affordable housing in accordance with the Policy and further details in the SPD. The requirement for affordable housing extends to all types of residential development including retirement flats. A retirement flat falls into the same class use as residential (class C3) and is therefore expected to contribute to the provision of appropriate affordable housing for which there is a need. Care homes, residential and nursing homes (class C2) that do not provide individual units of self contained accommodation are not required to provide affordable housing.

For example, developments of student accommodation, where the units are not self-contained (where each unit shares a kitchen or bathroom), will not be expected to provide affordable housing. Where the student accommodation units are self-contained, they will be treated as normal housing so the developer will be expected to provide 33.3% of the dwellings as affordable housing in line with the Local Plan policies.

4.3 Type, size and tenure of affordable housing

Type

A variety of dwelling types will be required to meet the wide range of housing needs in South Gloucestershire (PPS3 Paras 20-24: Achieving a mix of housing). Major or Significant sites (defined by the South Gloucestershire Statement of Community Involvement as sites over 200 dwellings or 4 hectares) are expected to provide dwelling types to meet district-wide needs, in the proportions identified in each type (PPS3 Para 29). Appendix 3 contains the Executive Summary of the JHAHNS and gives links to access the complete JHAHNS survey report. See also Section 5: Affordable Housing Need.

Size

So that affordable housing will be sustainable in use, unit sizes will be required to meet the same standards as those required by the Housing Corporation’s Design and Quality Standards and the South Gloucestershire Council's Development Standard. Sizes are assessed in relation to a minimum Housing Quality Indicator (HQI) score but will exceed them in some cases to incorporate the Lifetime Homes standard (see Appendix 4 for current minimum dwelling sizes).

Housing for wheelchair users will need to achieve a significantly higher HQI score in relation to size and therefore sizes greater than the minima shown above will be required (see Wheelchair Standard in Appendix 4).

Tenure

The JHAHNS found that social rented is the most important of the tenures required and should account for at least 95.5% of affordable housing provision, based on the backlog of unmet need and the intermediate options available at the time of the survey (JHAHNS para. 7.9), when shared ownership was provided at 50% equity shares with an annual rent of 3.5% - 4.0% of the unsold equity (JHAHNS Table 3.7). In order to widen the housing, to achieve a mixed and balanced community (PPS3 Paras 9, 12).

● “Pepperpotting”. In order to achieve this distribution, the Council will expect no more than 6 affordable houses, regardless of tenure, in a cluster and no more than 6 affordable flats using a common access in a block. On smaller sites (30 and below), clusters of no more than 3 will be sought. A degree of flexibility may be introduced, as long as a mixed and balanced community is achieved.

● Masterplan/distribution schedule for major or significant sites. On major sites, the masterplanning approval process will include a requirement for an affordable housing masterplan that sets out the proportions of affordable dwelling types and tenures in each phase of the development (PPS3 Annex B: Definitions - Design code). Examples of best practice are available from the Council.

9.3 Development standard

In order to deliver affordable housing which is sustainable in use and of a similar quality to affordable housing delivered by other means, the Council will seek a development standard for affordable housing, which will comply with the current standards of the Housing Corporation and national guidance on sustainable construction (See Appendix 4) (PPS3 Paras 12-19).

10. Ensuring Delivery of the Affordable Housing

In the case of planning applications for residential development, where the Director of Planning, Transportation and Strategic Environment is satisfied that there is a demonstrable need for affordable housing, negotiations will be held with applicants to achieve provision in line with Policy H6 and PPS3 (see also Section 4.2 of this document).

10.1 The need for public subsidy

Paragraph 8.191 of the SGLP says that "having considered expert estates/ valuation evidence on the economies of provision of affordable housing, the Local Plan Inspector concluded that up to 33.3% subsidised affordable housing would generally be viable over a range of sites allocated in Policy H1 and those likely to come forward as windfalls". The Council’s position, therefore, is that, without the justification of a development’s economic viability being jeopardised by the provision of 33.3% affordable housing, it will expect it to be provided without the need for public subsidy (see also DAH Para 7, 90-92).
8.1 Service Level Agreements
RSLs and AHPs providing affordable housing through a s.106 agreement will be expected to enter into a Service Level Agreement with the Council, which sets out the terms and conditions for nominating applicants from the Council’s Housing Register (DAH Para 19).

The Council will require 100% nominations on the initial lettings and leases of affordable housing delivered under legal agreements and 75% on subsequent lettings of social rented dwellings.

8.2 HomeBuy agents
HomeBuy agents are registered social landlords selected by the Housing Corporation for each Housing Market Area to market publicly funded intermediate affordable housing to eligible households. Where agreement is reached between developers and the Council, the HomeBuy agents also may market intermediate homes delivered without public subsidy (see Appendix 10 for current Homebuy Agent).

Nominations to social rented or intermediate homes provided by an unregistered body may also be made from a list approved by a HomeBuy agent (DAH Para 66).

8.3 Rural schemes
Rural Exception Schemes (see below paragraph 10.7) require initial occupants to have a family, residential or employment connection to the local parish (PPS3 Para 30; DAH Para 63). Subsequent lets will give priority to households with a local connection, cascading out to neighbouring parishes. Other rural schemes also may give priority to those with a local connection.

9. Design Issues

9.1 High quality design
Central Government policy, as well as local plan policies, demand high quality design of our neighbourhoods and buildings in order to deliver sustainable development and sustainable communities. The SGLP contains a range of policies that are related to design of the built and natural environments. In particular Policy D1 sets out the Council’s position on design quality. The South Gloucestershire Design Checklist SPD (Adopted August 2007) provides further guidance and contact details of the various relevant agencies. Affordable housing developments will be expected to achieve these high standards of design quality. (see also PPS3 Para 10).

9.2 Distribution
The affordable housing should be distributed across the development so that it is well integrated and indistinguishable, as far as possible, from neighbouring market opportunities for low cost home ownership, the Council sought more affordable intermediate housing options and considered various percentages of equity share and annual rent and other models of intermediate housing. By including these, it was possible to make intermediate housing available to more households on lower incomes and thus extend the proportion of intermediate tenure to 22.6% (see Section 7 of JHAHNS). The Council will endeavour to achieve the resultant tenure split of 77.4% rent; 22.6% intermediate on all sites above the threshold for affordable housing provision. (PPS3 Para 29).

4.4 Rural “exception” sites

POLICY H7: RURAL “EXCEPTIONS” SCHEMES
SMALL SCALE PROPOSALS FOR PERMANENT AFFORDABLE HOUSING TO MEET A LOCAL NEED WILL BE PERMITTED AS AN EXCEPTION, ON SITES WITHIN OR ADJOINING THE BOUNDARIES OF VILLAGES, AS DEFINED ON THE PROPOSALS MAP.

SUCH SCHEMES WILL NOT BE PERMITTED ON SITES WITHIN THE GREEN BELT EXCEPT ON SITES WITHIN OR ADJOINING THOSE EXISTING VILLAGES OR SMALL SETTLEMENTS WITH DEFINED SETTLEMENT BOUNDARIES, WHERE THE SCHEME IS SMALL SCALE, WHERE IT WOULD MEET AN IDENTIFIED NEED THAT CANNOT BE MET OUTSIDE THE GREEN BELT AND WHERE IT WOULD BE CONSISTENT WITH THE FUNCTIONS OF THE GREEN BELT.

PERMISSION WILL BE SUBJECT TO CONDITIONS, OR A PLANNING OBLIGATION WILL BE NEGOTIATED, TO ENSURE SUCH HOUSING IS RESERVED IN PERPETUITY FOR THOSE IN AFFORDABLE HOUSING NEED.

National planning guidance (PPS3 – Housing) confirms that seeking to achieve the provision of affordable housing can be augmented by an ‘exception’ policy in rural areas (PPS3 Para 30). This enables the Council to grant planning permission on land within or adjoining rural settlements where there are unlikely to be development sites of sufficient size to trigger the arrangements set out in Policy H6 of the SGLP. Policy H6 Paragraph 8.159 refers to the rural settlements listed in Paragraphs 8.157 to 8.159 of the SGLP Written Statement and defined on the SGLP Proposals Map. These settlements are also listed in Appendix 9.

These are sites where residential development would not normally be permitted. Where it may be possible, in exceptional circumstances, for affordable housing to come forward on sites outside settlement boundaries, an exception may be allowed to Policy H3 of the SGLP which otherwise prevents the provision of housing, to meet general demand, outside settlement boundaries.
As such sites are an exception to normal planning policies, small affordable housing developments will only be considered where a local need can be demonstrated, and that need cannot be met elsewhere.

Criteria for assessment of exception sites

- A land availability assessment has been carried out in and adjoining the parish settlements.
- A local needs assessment has been carried out and which shows clearly that there is a local need for the type and number of proposed dwellings.
- The proposal is small in scale, and the site is within or adjoining the existing built-up area.
- Consultation has been carried out with stakeholders, including the Parish Council or Parish Meeting, and their views taken into consideration.
- The affordable housing could not reasonably be provided elsewhere on a site allocated for residential development, or on a site meeting the criteria set out in Local Plan Policy H6.
- The proposal is subject to conditions or a legal obligation has been entered into to ensure initial and all subsequent occupancy is restricted to members of the local community in need of affordable housing.
- The proposal complies with all other policies in the plan.

Scale of development

Small in scale is of course relative to each settlement, but in most cases will be no more than 5 dwellings (SGLP Para. 8.202). The number of dwellings proposed must be accommodated satisfactorily on site without compromising the form and character of the settlement. The number of dwellings should not exceed the proven need and may, because of landscape and other constraints, result in fewer. Sites should not be remote from existing buildings and not comprise scattered, isolated development that intrudes into the open countryside.

Local connection

Local connection for the purpose of Policy H7 means residence in the parish in which the site is located, a connection due to family ties, support network, birth or formative years spent in the parish. Someone whose place of work is in the parish but is not resident in the parish also would be considered to have a local connection (see Policy H7 Paragraph 8.203). Policy H7 Paragraph 8.205 explains how a cascade approach would be adopted, if properties remained unlet to people with a connection to the village or parish, whereby people from neighbouring parishes would be considered eligible. The terms of the cascade would be set out in a s.106 Agreement.

Needs assessment

Local need is identified by a survey of all parish residents. The survey may be carried out by a RSL appointed by the Council or other qualified

as recommended by the Housing Corporation. (*General Index of Retail Prices CZBH all items percentage change over 12 months)

7.2 Intermediate

The Strategic Housing Market Assessment Practice Guidance Version 2, issued by CLG in August 2007, states: “A household can be considered able to afford intermediate affordable housing when rental payments (on the landlord’s share) and mortgage payments (on the part they own) constitute up to 25% of the gross household income. Housing Market Partnerships will need to consider that what is affordable may vary (e.g. a higher percentage may be affordable for someone on higher income). Local circumstances could justify a figure other than 25% of gross household income being used.” (SHMA Practice Guidance V2 – The requirement for intermediate affordable housing.)

Refer to Appendix 6 for current maxima of the initial equity share and associated annual rent that will allow intermediate housing to be affordable to those who cannot afford either market ownership or market rent. The Council will seek a range of intermediate affordable housing products to meet identified need.

7.3 Service charges

Service charges will be included when assessments are made to determine whether affordable housing is affordable. The Council will expect service charges to be limited to maintain affordability. (DAH Para 19).

8. Occupation

Affordable housing delivered under Policies H6 or H7 may be occupied only by eligible persons who have been nominated under a Service Level Agreement between the Council and the affordable housing provider (see below). Households who are unable to meet their housing needs in the market will be considered eligible (DAH Para 30). Normally only households on the Council or RSL registers would be considered eligible for social rented housing (DAH Para 35). PPS3 Annex B defines affordable housing as being: “provided to specified eligible households whose needs are not met by the market.” The priority given to eligible applicants will depend on their individual circumstances.

The Council operates a choice based lettings system known as HomeChoice. (http://homechoice.southglos.gov.uk/)
6.4 Specialist affordable housing
Social rented or intermediate affordable housing may be sought under Policy H6 for people with specific accommodation requirements that are not otherwise met, and where a need has been identified, including:

- **Supported housing.** Accommodation for those with support needs which may or may not be specially adapted for people with particular disabilities. For example, a proportion of wheelchair accessible dwellings will be sought on sites which the Council’s Occupational Therapist has assessed as suitable for wheelchair users. (see Appendix 4)

- **ExtraCare.** Self-contained accommodation which provides flexible care and support arrangements to meet the increasing needs of people whilst enabling them to stay in their homes as they get older.

The definitions above derive from Council policies and strategies and comply with nationally recognised guidance, including that of the Housing Corporation and the Department of Health (Care Services Improvement Partnership).

Other forms of specialist housing may be required through other policies to ensure mixed and balanced communities are created, but this may fall outside the provision required under Policy H6 for affordable housing.

6.5 Exceptions
The following are not regarded as affordable housing and, although their provision may be encouraged in the context of creating mixed communities and where demand exists, they will not be required or accepted as a contribution to Policy H6.

- **Low-cost market housing** - housing for sale which is cheaper than most market housing or at the lower end of the market. The Council will consider the need for low-cost market housing as part of the overall housing mix (PPS3 Para. 26 and DAH Para. 41) but outside the provisions for affordable housing.

- **Key worker housing** will not be provided under Policy H6. Key workers may be considered for affordable housing if they satisfy the same eligibility criteria as any other group. “The Government’s definition of key workers includes those groups eligible for the Housing Corporation funded Key Worker Living programme and others employed within the public sector (i.e. outside of this programme) identified by the Regional Housing Board for assistance.” (PPS3 Annex B: Definitions).

- **Market housing** – private housing for rent or for sale, where the price is set in the open market (PPS3 Annex B: Definitions)

7. Affordability
In order that the affordable housing provided under Policy H6 is accessible to eligible households, providers will be required to demonstrate that it is available at a cost to the occupiers that they can afford (DAH Para 30).

7.1 Social rent
Social rented housing must be let at no more than target rents as determined by the national rent regime, or equivalent, as agreed with the Council (DAH Para 31). The annual percentage increase in rent will be limited to RPI* plus 0.5%, organisation. The Housing Enabling Team can provide advice on the particular requirements of any settlement or scheme, having previously carried out an assessment of site availability with the Parish Council. The Parish Council may often have initiated the proposal for affordable housing and its support will be needed at all stages. The number of needs surveys that can be carried out annually may be limited by a lack of resources. It should be remembered that the H7 exceptions sites policy is an “exception” to the Local Plan Housing Policies and not to all policies in the Local Plan. The need for rural affordable housing does not therefore override other policies in the Local Plan, notably policies relating to Green Belt and Cotswold Area of Outstanding Natural Beauty.

In “perpetuity”
As such sites are an exception to normal planning policies, it is important that the affordable housing provided to meet local need remains available for both initial and future occupiers who need it (see Section 10: Ensuring Delivery of the Affordable Housing - Retention of Affordable Housing).

5. Affordable Housing Need
5.1 The need for affordable housing
The widening gap between housing costs and household incomes has resulted in fewer households being able to afford market housing (see definition in paragraph 6.5) in South Gloucestershire.

South Gloucestershire’s Housing Register currently (October 2007) has over 4,500 households registered for help in meeting their housing needs. Around 160 new applications are received each month. Many applicants originally approached the Council for help because they were homeless. The number of homeless households for whom the Council accepted a responsibility to provide housing between April 06 - March 07 was 276 (HIP HSSA 2007), although it is a figure that has been gradually falling each year as priority needs are more quickly addressed and initiatives to prevent homelessness have been implemented.

In March 2003 John Herington Associates was commissioned to undertake a Housing Needs Survey (HNS) for South Gloucestershire. The Housing Needs Survey findings reveal that in purely numerical terms, taking into account local tenure mix, and the local levels of incomes and house prices, if all eligible sites, either allocated in the local plan or “windfall” were required to deliver 100% affordable housing this would still fall some considerable way short of the net need for affordable dwellings. Therefore every opportunity must be taken to build affordable housing on suitable sites.

The scale of projected ‘total net housing need’ justifies the Council in seeking to negotiate the maximum level of subsidised affordable housing which is sustainable and deliverable within mixed tenure schemes. Having considered expert estates/valuation evidence on the economics of provision of affordable housing, the Local Plan Inspector at the Local Plan Inquiry (LPI) in to the SGLP concluded that up to 33.3% subsidised affordable housing could be provided without the need to rely on public subsidy and would generally be viable over the range of sites allocated in Policy H1 of the local plan and those likely to come forward as “windfalls”.

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In seeking to negotiate subsidised affordable housing on a particular site, the Council will have regard to the identified housing need in South Gloucestershire and the economics of provision on that site.

In determining planning applications for residential development, the Council will consider detailed evidence of housing needs from the current Housing Register, any other recent local housing needs survey, and advice from experts. The Council will review the need for affordable housing during the course of the plan period and where appropriate will seek to amend the Local Plan, update this Supplementary Planning Document, including its appendices, and review the Housing Strategy.

5.2 Strategic Housing Market Assessment

The Department for Communities and Local Government (DCLG) issued guidance on carrying out Strategic Housing Market Assessments in March 2007 and published version 2 of the document in August 2007. The recommended partnership has been formed with participating local authorities and other stakeholders in the strategic housing market area of the West of England and is currently in the process of carrying out the Strategic Housing Market Assessment.

Until such time as the Strategic Housing Market Assessment (SHMA) has been completed and its findings and recommendations published, the Council will rely on the findings of the John Herington Associates Housing Needs Survey, incorporating the Forecast Validation 2006, and other relevant up-to-date information where appropriate. This accords with Policy H6 Paragraph 8.193. If advice contained in the SPD is affected or superseded by the SHMA, any changes will be considered for implementation through the Council’s formal decision making process.

6. Types of Affordable Housing

6.1 Definition of affordable housing

The Council uses the definitions of affordable housing set out in Annex B of PPS3 and Annex B of Delivering Affordable Housing, which is that it includes social rented and intermediate housing, provided to specified eligible households whose needs are not met by the market. Affordable housing should:

- Meet the needs of eligible households including availability at a cost low enough for them to afford, determined with regard to local incomes and local house prices
- Include provision for the home to remain at an affordable price for future eligible households or, if these restrictions are lifted, for the subsidy to be recycled for alternative affordable housing provision. (PPS3, Annex B: Definitions)

The definition used in SGLP paragraph 8.184 includes low-cost market housing, although the guidance in PPS3 and Delivering Affordable Housing, issued after the adoption of the SGLP, specifically excludes it from the definition (PPS3 Annex B, page 25). The Council will comply with the definition used in PPS3, which supersedes that of the Local Plan, so that any low-cost housing which falls outside of the PPS3 definition of affordable housing will not be considered to form part of the affordable housing provided under Policy H6.

6.2 Social rented housing

“Rented housing owned and managed by local authorities and registered social landlords (RSLs), for which guideline target rents are determined through the national rent regime. The proposals set out the Three Year Review of Rent Restructuring (July 2004) were implemented as policy in April 2006. It may also include rented housing owned or managed by other persons and provided under equivalent rental arrangements to the above, as agreed with the local authority or with the Housing Corporation as a condition of grant” (PPS3, Annex B: Definitions)

The Council will accept delivery by other affordable housing providers (AHPs) if equivalent rents and suitable management standards are ensured.

6.3 Intermediate housing

“Housing at prices and rents above those of social rent, but below market price or rents, and which meet the criteria set out above. These can include shared equity products (e.g. HomeBuy), or other low cost homes for sale and intermediate rent” (PPS3, Annex B: Definitions)

Also included is housing which meets other criteria of affordable housing, such as the eligibility of occupiers and availability for future, eligible households. The definition does not exclude homes provided by private sector bodies or provided without grant funding, which, as long as they meet the definition above, will be considered as affordable housing under Policy H6. Where intermediate homes are provided to satisfy Policy H6, they will be negotiated with reference to the affordability criteria set out in Section 7. It may include (but not be limited to):

- **HomeBuy (Shared ownership)** - where the purchaser buys an initial share from a provider, who retains the remainder of the equity and may charge a rent as a proportion of the unsold equity. The purchaser may acquire further equity shares by ‘staircasing’, until the whole home is owned, unless this is restricted, e.g. in a rural area. (DAH Annex D).

- **Intermediate rent** - rented homes provided at rent levels above those of social rented but below those of private rented. (DAH Annex B Para. 38).

- **Discounted sale** - homes which have a simple discount for the purchaser on its market price, so the purchaser buys the whole home at a reduced rate. (DAH Annex B Para. 38). The Council would expect the discount to be available to future eligible purchasers.
In seeking to negotiate subsidised affordable housing on a particular site, the Council will have regard to the identified housing need in South Gloucestershire and the economics of provision on that site.

In determining planning applications for residential development, the Council will consider detailed evidence of housing needs from the current Housing Register, the South Gloucestershire Housing Needs Survey and any other recent local housing needs survey. Advice will be sought from the Housing Enabling Team. (See also Appendix 1: Extract from SGLP – Policies H6 and H7, and Section 10: Ensuring Delivery of Affordable Housing).

The Council will review the need for affordable housing during the course of the plan period and where appropriate will seek to amend the Local Plan, update this Supplementary Planning Document, including its appendices, and review the Housing Strategy.

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- **HomeBuy (Shared ownership)** - where the purchaser buys an initial share from a provider, who retains the remainder of the equity and may charge a rent as a proportion of the unsold equity. The purchaser may acquire further equity shares by ‘staircasing’, until the whole home is owned, unless this is restricted, e.g. in a rural area. (DAH Annex D).
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- **ExtraCare.** Self-contained accommodation which provides flexible care and support arrangements to meet the increasing needs of people whilst enabling them to stay in their homes as they get older.

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Other forms of specialist housing may be required through other policies to ensure mixed and balanced communities are created, but this may fall outside the provision required under Policy H6 for affordable housing.

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The following are not regarded as affordable housing and, although their provision may be encouraged in the context of creating mixed communities and where demand exists, they will not be required or accepted as a contribution to Policy H6.

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- **Market housing** - private housing for rent or for sale, where the price is set in the open market (PPS3 Annex B: Definitions)

5. Affordable Housing Need

5.1 The need for affordable housing

The widening gap between housing costs and household incomes has resulted in fewer households being able to afford market housing (see definition in paragraph 6.5) in South Gloucestershire.

South Gloucestershire’s Housing Register currently (October 2007) has over 4,500 households registered for help in meeting their housing needs. Around 160 new applications are received each month. Many applicants originally approached the Council for help because they were homeless. The number of homeless households for whom the Council accepted a responsibility to provide housing between April 06 - March 07 was 276 (HIP HSSA 2007), although it is a figure that has been gradually falling each year as priority needs are more quickly addressed and initiatives to prevent homelessness have been implemented.

In March 2003 John Herington Associates was commissioned to undertake a Housing Needs Survey (HNS) for South Gloucestershire. The Housing Needs Survey findings reveal that in purely numerical terms, taking into account local tenure mix, and the local levels of incomes and house prices, if all eligible sites, either allocated in the local plan or "windfall" were required to deliver 100% affordable housing this would still fall some considerable way short of the need for affordable dwellings. Therefore every opportunity must be taken to build affordable housing on suitable sites.

7. Affordability

In order that the affordable housing provided under Policy H6 is accessible to eligible households, providers will be required to demonstrate that it is available at a cost to the occupiers that they can afford (DAH Para 30).

7.1 Social rent

Social rented housing must be let at no more than target rents as determined by the national rent regime, or equivalent, as agreed with the Council (DAH Para 31). The annual percentage increase in rent will be limited to RPI* plus 0.5%, organisation. The Housing Enabling Team can provide advice on the particular requirements of any settlement or scheme, having previously carried out an assessment of site availability with the Parish Council. The Parish Council may often have initiated the proposal for affordable housing and its support will be needed at all stages. The number of needs surveys that can be carried out annually may be limited by a lack of resources.

It should be remembered that the H7 exceptions sites policy is an “exception” to the Local Plan Housing Policies and not to all policies in the Local Plan. The need for rural affordable housing does not therefore override other policies in the Local Plan, notably policies relating to Green Belt and Cotswold Area of Outstanding Natural Beauty.

In “perpetuity”

As such sites are an exception to normal planning policies, it is important that the affordable housing provided to meet local need remains available for both initial and future occupiers who need it (See Section 10: Ensuring Delivery of the Affordable Housing - Retention of Affordable Housing).
As such sites are an exception to normal planning policies, small affordable housing developments will only be considered where a local need can be demonstrated, and that need cannot be met elsewhere.

**Criteria for assessment of exception sites**

- A land availability assessment has been carried out in and adjoining the parish settlements.
- A local needs assessment has been carried out and which shows clearly that there is a local need for the type and number of proposed dwellings.
- The proposal is small in scale, and the site is within or adjoining the existing built up area.
- Consultation has been carried out with stakeholders, including the Parish Council or Parish Meeting, and their views taken into consideration.
- The affordable housing could not reasonably be provided elsewhere on a site allocated for residential development, or on a site meeting the criteria set out in Local Plan Policy H6.
- The proposal is subject to conditions or a legal obligation has been entered into to ensure initial and all subsequent occupancy is restricted to members of the local community in need of affordable housing.
- The proposal complies with all other policies in the plan.

**Scale of development**

Small in scale is of course relative to each settlement, but in most cases will be no more than 5 dwellings (SGLP Para. 8.202). The number of dwellings proposed must be accommodated satisfactorily on site without compromising the form and character of the settlement. The number of dwellings should not exceed the proven need and may, because of landscape and other constraints, result in fewer. Sites should not be remote from existing buildings and not comprise scattered, isolated development that intrudes into the open countryside.

**Local connection**

Local connection for the purpose of Policy H7 means residence in the parish in which the site is located, a connection due to family ties, support network, birth or formative years spent in the parish. Someone whose place of work is in the parish but is not resident in the parish also would be considered to have a local connection (see Policy H7 Paragraph 8.203). Policy H7 Paragraph 8.205 explains how a cascade approach would be adopted, if properties remained unlet to people with a connection to the village or parish, whereby people from neighbouring parishes would be considered eligible. The terms of the cascade would be set out in a s.106 Agreement.

**Needs assessment**

Local need is identified by a survey of all parish residents. The survey may be carried out by a RSL appointed by the Council or other qualified as recommended by the Housing Corporation.

(*General Index of Retail Prices CZBH all items percentage change over 12 months*)

**7.2 Intermediate**

The Strategic Housing Market Assessment Practice Guidance Version 2, issued by CLG in August 2007, states:

“A household can be considered able to afford intermediate affordable housing when rental payments (on the landlords share) and mortgage payments (on the part they own) constitute up to 25% of the gross household income. Housing Market Partnerships will need to consider that what is affordable may vary (e.g. a higher percentage may be affordable for someone on higher income). Local circumstances could justify a figure other than 25% of gross household income being used.”

(SHMA Practice Guidance V2 – The requirement for intermediate affordable housing)

Refer to Appendix 6 for current maxima of the initial equity share and associated annual rent that will allow intermediate housing to be affordable to those who cannot afford either market ownership or market rent. The Council will seek a range of intermediate affordable housing products to meet identified need.

**7.3 Service charges**

Service charges will be included when assessments are made to determine whether affordable housing is affordable. The Council will expect service charges to be limited to maintain affordability. (DAH Para 19).

**8. Occupation**

Affordable housing delivered under Policies H6 or H7 may be occupied only by eligible persons who have been nominated under a Service Level Agreement between the Council and the affordable housing provider (see below). Households who are unable to meet their housing needs in the market will be considered eligible (DAH Para 30). Normally only households on the Council or RSL registers would be considered eligible for social rented housing (DAH Para 35). PPS3 Annex B defines affordable housing as being: “provided to specified eligible households whose needs are not met by the market.” The priority given to eligible applicants will depend on their individual circumstances.

The Council operates a choice based lettings system known as HomeChoice. (http://homechoice.southglos.gov.uk/)
8.1 Service Level Agreements

RSLs and AHPs providing affordable housing through a s.106 agreement will be expected to enter into a Service Level Agreement with the Council, which sets out the terms and conditions for nominating applicants from the Council’s Housing Register (DAH Para 19).

The Council will require 100% nominations on the initial lettings and leases of affordable housing delivered under legal agreements and 75% on subsequent lettings of social rented dwellings.

8.2 HomeBuy agents

HomeBuy agents are registered social landlords selected by the Housing Corporation for each Housing Market Area to market publicly funded intermediate affordable housing to eligible households. Where agreement is reached between developers and the Council, the HomeBuy agents also may market intermediate homes delivered without public subsidy (see Appendix 10 for current Homebuy Agent).

Nominations to social rented or intermediate homes provided by an unregistered body may also be made from a list approved by a HomeBuy agent (DAH Para 66).

8.3 Rural schemes

Rural Exception Schemes (see below paragraph 10.7) require initial occupants to have a family, residential or employment connection to the local parish (PPS3 Para 30; DAH Para 63). Subsequent lets will give priority to households with a local connection, cascading out to neighbouring parishes. Other rural schemes also may give priority to those with a local connection.

9. Design Issues

9.1 High quality design

Central Government policy, as well as local plan policies, demand high quality design of our neighbourhoods and buildings in order to deliver sustainable development and sustainable communities. The SGLP contains a range of policies that are related to design of the built and natural environments. In particular Policy D1 sets out the Council’s position on design quality. The South Gloucestershire Design Checklist SPD (Adopted August 2007) provides further guidance and contact details of the various relevant agencies. Affordable housing developments will be expected to achieve these high standards of design quality. (see also PPS3 Para 10).

9.2 Distribution

The affordable housing should be distributed across the development so that it is well integrated and indistinguishable, as far as possible, from neighbouring market opportunities for low cost home ownership, the Council sought more affordable intermediate housing options and considered various percentages of equity share and annual rent and other models of intermediate housing. By including these, it was possible to make intermediate housing available to more households on lower incomes and thus extend the proportion of intermediate tenure to 22.6% (see Section 7 of JHAH-NS). The Council will endeavour to achieve the resultant tenure split of 77.4% rent; 22.6% intermediate on all sites above the threshold for affordable housing provision. (PPS3 Para 29).

4.4 Rural “exception” sites

POLICY H7: RURAL “EXCEPTIONS” SCHEMES

SMALL SCALE PROPOSALS FOR PERMANENT AFFORDABLE HOUSING TO MEET A LOCAL NEED WILL BE PERMITTED AS AN EXCEPTION, ON SITES WITHIN OR ADJOINING THE BOUNDARIES OF VILLAGES, AS DEFINED ON THE PROPOSALS MAP.

SUCH SCHEMES WILL NOT BE PERMITTED ON SITES WITHIN THE GREEN BELT EXCEPT ON SITES WITHIN OR ADJOINING THOSE EXISTING VILLAGES OR SMALL SETTLEMENTS WITH DEFINED SETTLEMENT BOUNDARIES, WHERE THE SCHEME IS SMALL SCALE, WHERE IT WOULD MEET AN IDENTIFIED NEED THAT CANNOT BE MET OUTSIDE THE GREEN BELT AND WHERE IT WOULD BE CONSISTENT WITH THE FUNCTIONS OF THE GREEN BELT.

PERMISSION WILL BE SUBJECT TO CONDITIONS, OR A PLANNING OBLIGATION WILL BE NEGOTIATED, TO ENSURE SUCH HOUSING IS RESERVED IN PERPETUITY FOR THOSE IN AFFORDABLE HOUSING NEED.

National planning guidance (PPS3 – Housing) confirms that seeking to achieve the provision of affordable housing can be augmented by an ‘exception’ policy in rural areas (PPS3 Para 30). This enables the Council to grant planning permission on land within or adjoining rural settlements where there are unlikely to be development sites of sufficient size to trigger the arrangements set out in Policy H6 of the SGLP. Policy H6 Paragraph 8.159 refers to the rural settlements listed in Paragraphs 8.157 to 8.159 of the SGLP Written Statement and defined on the SGLP Proposals Map. These settlements are also listed in Appendix 9.

These are sites where residential development would not normally be permitted. Where it may be possible, in exceptional circumstances, for affordable housing to come forward on sites outside settlement boundaries, an exception may be allowed to Policy H3 of the SGLP, which otherwise prevents the provision of housing, to meet general demand, outside settlement boundaries.
Specialist residential development

Where schemes of specialist accommodation for purchase or rent on the open market are proposed and where the application triggers consideration under Policy H6 then officers will seek to maximise the provision of affordable housing in accordance with the Policy and further details in the SPD.

The requirement for affordable housing extends to all types of residential development including retirement flats. A retirement flat falls into the same class use as residential (class C3) and is therefore expected to contribute to the provision of appropriate affordable housing for which there is a need.

Care homes, residential and nursing homes (class C2) that do not provide individual units of self contained accommodation are not required to provide affordable housing.

For example, developments of student accommodation, where the units are not self-contained (where each unit shares a kitchen or bathroom), will not be expected to provide affordable housing. Where the student accommodation units are self-contained, they will be treated as normal housing so the developer will be expected to provide 33.3% of the dwellings as affordable housing in line with the Local Plan policies.

4.3 Type, size and tenure of affordable housing

Type

A variety of dwelling types will be required to meet the wide range of housing needs in South Gloucestershire (PPS3 Paras 20-24: Achieving a mix of housing). Major or Significant sites (defined by the South Gloucestershire Statement of Community Involvement as sites over 200 dwellings or 4 hectares) are expected to provide dwelling types to meet district-wide needs, in the proportions identified in each type (PPS3 Para 29). Appendix 3 contains the Executive Summary of the JHAHNS and gives links to access the complete JHAHNS survey report. See also Section 5: Affordable Housing Need.

Size

So that affordable housing will be sustainable in use, unit sizes will be required to meet the same standards as those required by the Housing Corporation’s Design and Quality Standards and the South Gloucestershire Council’s Development Standard. Sizes are assessed in relation to a minimum Housing Quality Indicator (HQI) score but will exceed them in some cases to incorporate the Lifetime Homes standard (see Appendix 4 for current minimum dwelling sizes).

Housing for wheelchair users will need to achieve a significantly higher HQI score in relation to size and therefore sizes greater than the minima shown above will be required (see Wheelchair Standard in Appendix 4).

Tenure

The JHAHNS found that social rented is the most important of the tenures required and should account for at least 95.5% of affordable housing provision, based on the backlog of unmet need and the intermediate options available at the time of the survey (JHAHNS para. 7.9), when shared ownership was provided at 50% equity shares with an annual rent of 3.5% - 4.0% of the unsold equity (JHAHNS Table 3.7). In order to widen the housing, to achieve a mixed and balanced community (PPS3 Paras 9, 12).

● “Pepperpotting”. In order to achieve this distribution, the Council will expect no more than 6 affordable houses, regardless of tenure, in a cluster and no more than 6 affordable flats using a common access in a block. On smaller sites (30 and below), clusters of no more than 3 will be sought. A degree of flexibility may be introduced, as long as a mixed and balanced community is achieved.

● Masterplan/distribution schedule for major or significant sites. On major sites, the masterplanning approval process will include a requirement for an affordable housing masterplan that sets out the proportions of affordable dwelling types and tenures in each phase of the development (PPS3 Annex B: Definitions - Design code). Examples of best practice are available from the Council.

9.3 Development standard

In order to deliver affordable housing which is sustainable in use and of a similar quality to affordable housing delivered by other means, the Council will seek a development standard for affordable housing, which will comply with the current standards of the Housing Corporation and national guidance on sustainable construction (See Appendix 4) (PPS3 Paras 12-19).

10. Ensuring Delivery of the Affordable Housing

In the case of planning applications for residential development, where the Director of Planning, Transportation and Strategic Environment is satisfied that there is a demonstrable need for affordable housing, negotiations will be held with applicants to achieve provision in line with Policy H6 and PPS3 (see also Section 4.2 of this document).

10.1 The need for public subsidy

Paragraph 8.191 of the SGLP says that “having considered expert estates/valuation evidence on the economies of provision of affordable housing, the Local Plan Inspector concluded that up to 33.3% subsidised affordable housing would generally be viable over a range of sites allocated in Policy H1 and those likely to come forward as windfalls”. The Council’s position, therefore, is that, without the justification of a development’s economic viability being jeopardised by the provision of 33.3% affordable housing, it will expect it to be provided without the need for public subsidy (see also DAH Para 7, 90-92).
The Council will require affordable housing on any development of 5 or more dwellings, or on a residential site with a gross area of at least 0.2ha. PPS3 (Paras10, 45-51) makes it clear that new housing should make efficient use of land, which SGLP Policy H6 Para. 8.196 supports. Where land is used inefficiently to avoid having to provide affordable housing, this would be likely to lead to a recommendation of refusal of planning permission.

Where a proposal is just under the threshold e.g. 4 units (assuming that the site area is below 0.2 ha), the developer may be required to demonstrate, against the background of the requirements of SGLP and other national policy guidance, that their proposed density makes efficient use of the land.

Should an outline application for residential development be proposed, the Council will assess the housing density that is appropriate to the site. If this is determined to be 5 dwellings or more, then the applicant will be expected to enter into a legal agreement to provide affordable housing, in line with Policy H6.

Artificial subdivision of sites

The Council will regard a developable site in its entirety for the purpose of implementing Policy H6. Para. 8.196 of the Policy states:

"Where it is proposed to phase development, sub-divide sites or where there is a reasonable prospect of adjoining land being developed for residential purposes in tandem, the Council, will take the whole site for the purpose of determining whether the scheme falls above or below the thresholds."

A planning application will be assessed to see whether it and/or the adjoining land has been subject to recent subdivision and if so, to what purpose. If the Council considers that the formerly adjacent land, not subject to the current application, could come forward for housing in the near future, the Council would seek to impose a condition whereby, should any application be submitted within 5 years of completion of the principal site, both sites would be assessed as one for the purposes of applying Policy H6.

Conversions

Policy H6 also applies to the conversion of any building, including those in rural areas, whether or not it is already in residential use.

4.2 Proportion of affordable housing (Policy H6)

Where Policy H6 applies, the Council will require the provision of 33.3% of the proposed dwellings as affordable housing (PPS3 Para 29). Proposals not complying with Policy H6 and the provisions of PPS3 may lead to a recommendation to refuse planning permission.

The applicant will be expected to enter into a legal agreement to provide 33.3% of the total number of dwellings on site as affordable housing, unless there is a robust justification for reducing this proportion because of impact on economic viability or other acceptable reason. If such a reduced proportion is agreed, the Council may seek the provision of additional affordable housing on the application site to make up for the reduction in affordable housing delivered through the planning process and may support an application to the Housing Corporation for the necessary funding (see Section 10 Ensuring Delivery of Affordable Housing).
4. Affordable Housing Policies

The policies with the supporting text to which this SPD relates are set out in Appendix 1. The policies themselves are also shown in the boxes below.

**POLICY H6: AFFORDABLE HOUSING**

**THE COUNCIL WILL SEEK AN ELEMENT OF SUBSIDISED AFFORDABLE HOUSING TO MEET LOCAL NEEDS ON ALL NEW HOUSING DEVELOPMENTS OF 15 OR MORE DWELLINGS OR 0.5 HECTARE OR MORE, IRRESPECTIVE OF THE NUMBER OF DWELLINGS, (EXCEPT IN SETTLEMENTS IN RURAL AREAS WHERE THE THRESHOLD WILL BE 5 OR MORE DWELLINGS OR 0.2 OF A HECTARE).**

ON THOSE SITES ALLOCATED IN POLICY H1, THE COUNCIL WILL NEGOTIATE WITH DEVELOPERS ON THE BASIS OF A TARGET OF 33.3% OF THE DWELLINGS PERMITTED.

ON “WINDFALL SITES”, NEGOTIATIONS WILL ALSO BE BASED ON A TARGET OF 33.3% OF DWELLINGS SUBJECT TO THE NEEDS OF THE AREA.

PERMISSION WILL BE SUBJECT TO CONDITIONS OR A PLANNING OBLIGATION WILL BE NEGOTIATED TO ENSURE SUCH HOUSING IS AVAILABLE TO FIRST AND SUBSEQUENT OCCUPIERS WHO NEED IT.

IN SEEKING TO NEGOTIATE THE MAXIMUM LEVEL OF AFFORDABLE HOUSING ON EACH SITE THAT IS FEASIBLE UP TO THESE TARGETS THE COUNCIL WILL HAVE REGARD TO THE ECONOMIC VIABILITY OF SITE DEVELOPMENT, LIKELY COSTS, EXISTING MARKET CONDITIONS, THE AVAILABILITY OF PUBLIC SUBSIDY AND THE AIM OF ACHIEVING BALANCED AND STABLE COMMUNITIES.

4.1 Threshold for providing affordable housing

**Urban areas**

The Council will require affordable housing as part of any development of 15 or more dwellings, or on a site that includes residential development and has a capacity of at least 15 dwellings or on a residential site with a gross area of at least 0.5ha. PPS3 (Paragraphs 10, 45–51, 69) makes it clear that new housing should make efficient use of land, which SGLP Policy H6 Paragraph 8.196 supports. Where land is used inefficiently to avoid having to provide affordable housing, this would be likely to lead to a recommendation of refusal of planning permission.

Where a proposal is just under the threshold e.g. 14 units (assuming that the site area is below 0.5 ha), the developer may be required to demonstrate, against the background of the requirements of Policy H2 paragraph 8.154 of the SGLP and other national policy guidance, that their proposed density makes efficient use of the land.

Should an outline application for residential development be proposed, the Council will assess the housing density that is appropriate to the site. If this is determined to be 15 dwellings or more, then the applicant will be expected to enter into a legal agreement to provide affordable housing, in line with Policy H6.

10.4 Viability

Applicants who cite non-viability as the reason for not complying with Policy H6 must support their case with sufficient evidence when submitting their planning application. When considering any viability arguments the Council will not take into account what the applicant has paid, or has agreed to pay, for the land when making its assessment. The assessment will be made having regard to the residual land value arrived at once all necessary costs of development have been deducted. Such costs will include those associated with any necessary planning obligations valid at the time of the application or any restrictions, encumbrances or abnormal ground conditions, all of which should be, or should have been, reflected in the purchase price. If, despite all reasonable investigations prior to purchase, abnormal conditions are subsequently discovered which render the scheme unviable, supporting evidence should be submitted to the Council, which will take it into consideration.

Economic viability will be assessed by the Council’s Property Services Department or an independent surveyor appointed as necessary, with the developer being liable for reasonable costs incurred by the Council. Confidentiality will be assured.

Supporting evidence required should be on open-book basis, should relate directly to the application site and include the following:

- Full development appraisal of scheme with estimates to support any quoted values/costs.
- Plan of development including gross and net sales internal areas of dwellings.
- Details of land purchase/option agreement etc with copy of contract.
- Reasoned justification for reduction in affordable housing provision.
- Evidence of any current use value.

The development appraisal should be made on the basis of:

- Provision on site of 33.3% affordable housing to comply with PPS3, SGLP Policy H6 and the requirements of this document and its impact on the viability of the residual land value; and
- Proposed provision which would make the scheme viable for the developer, supported by local market comparable evidence.

If the Council is satisfied that the financial appraisal confirms that the affordable housing requirement renders the scheme unviable, the Council can consider:

- a lower percentage of affordable housing but retaining the tenure split and unit mix; or
- retaining the target percentage but adjusting the tenure split or unit mix; or
- supporting the introduction of grant funding to achieve the target contribution (see para. 4.2); or
- a combination of these options, such that the scheme viability is restored.

10.5 Registered Social Landlord (RSL) / Affordable Housing Provider (AHP)

The Council is in partnership with RSLs of the South Gloucestershire Housing Partnership (SGHP), which delivers affordable housing within South Gloucestershire, and HomesWest, which has a strategic role in the West of England sub-region. Contact details of both partnerships are to be found in Appendix 10. The partnerships are due to be reviewed in 2009/10.
The Council’s preference is for affordable housing delivery by one of its partner RSLs but, consistent with the guidance in Delivering Affordable Housing (CLG 2006), will not prescribe which organisation the developer chooses to work with (DAH Annex C: Para. 48). A developer may wish to work with a RSL which is not in partnership with the Council, or with another, unregistered affordable housing provider. Whichever provider is chosen, it is advisable for the developer to involve them at the earliest opportunity, ideally before the design stage (DAH Annex C: Para. 50).

### 10.6 Affordable Housing Manager

Where it is intended that the affordable housing units will be transferred upon completion to a RSL which is not a partner of the Council or to another, unregistered affordable housing manager, the Council will require evidence of acceptable management standards and may reject a provider and/or manager where the standards cannot be shown to be met (see Appendix 5: Management Standards). An obligation to meet the management standards set out in Appendix 5 will be included in the legal agreement. (see also DAH Annex C: Para. 49)

### 10.7 Retention of affordable housing

The Council’s intention is to provide affordable housing which is retained as such for as long as it is needed. Policy H6 states, in part, “Permission will be subject to conditions or a planning obligation will be negotiated to ensure such housing is reserved for first and subsequent occupiers who need it.” The definitions of affordable housing in both PPS3 and DAH state:

“Affordable housing should: Include provision for the home to remain at an affordable price for future eligible households or, if these restrictions are lifted, for the subsidy to be recycled for alternative affordable housing provision”

(PPS 3 Annex B: Definitions; DAH Annex B: Definitions and types of affordable housing).

- **Social rented housing**, which is delivered without public subsidy is exempt from the requirements of the Right to Acquire. If subsequent legislation overrides this exemption, any capital receipts resulting from sales will be recycled to provide affordable housing in South Gloucestershire.

- **Intermediate housing** may be lost as affordable housing through staircasing to full ownership. In order to be able to replace it, the Council will require net capital receipts to be recycled towards the provision of additional affordable housing in South Gloucestershire. The mechanism is set out in Appendix 7. This will also be required in the case of social rented housing sold through the Right to Acquire, where it applies. (DAH Paras 19, 40, 71, 72)

- **Rural affordable housing**. Certain rural areas are exempt from the Right to Acquire, through the provisions of Statutory Instrument 1997 No. 621, which identifies the exempt parishes of South Gloucestershire. Shared ownership intermediate housing may be subject to a staircasing limit, e.g., 80% equity, to prevent its loss through outright sale. Affordable housing on Rural Exception sites will be subject to obligations in a legal agreement which limit occupancy to those with a local connection but with a cascade approach to widen the area of connection in order to retain it as affordable housing.

### 10.8 Phasing

Developers should ensure that the affordable housing is delivered no later than the market housing. This will be ensured through the legal agreement, which will plans, policies and programmes should aim to ensure that sufficient affordable housing is provided in order to meet community needs in both urban and rural areas. This should include, among other things, the identification of targets in development plans indicating the levels of affordable housing required in each area; these should be based on local housing needs assessments undertaken to consistent standards across the region, which take into account both need and supply side considerations.”

RPG10 confirms that the need for affordable housing across the Region is expected to remain significant. The current estimate of need for affordable housing in the South West is 6,000 to 10,000 units a year. This equates to between 30% and 50% of all new housing provision over the period 1996 to 2016.

The Regional Spatial Strategy (RSS) for the South West will eventually replace RPG10 and provides the regional strategic planning framework. The Draft RSS emphasises the high level of need for affordable housing in the region and refers to the importance of the planning system in helping to provide it. Policy H of the Draft RSS identifies that within the 23,000 dwellings per annum required for the region, at least 7,500 affordable homes will need to be provided in the period to 2026. This equates to at least 30% of all housing developments annually across each local authority area and Housing Market Area to be affordable, with authorities specifying rates up to 60% or higher in areas of greatest need. The Panel Report following the Examination in Public (EIP) to the Draft RSS published in January 2008 regards the general approach to affordable housing within the Draft RSS to be acceptable. The report suggests that: “...within the 28,000 dwellings per annum (at least) required for the region, the aim should be to provide at least 10,000 homes per annum in the period to 2026...”. This equates to at least 35% of all housing. Applicants are advised to contact the Council at the time of application to confirm current status.

The SGLP policies are “saved” through the Local Development Scheme until they are replaced by new policies in a Local Development Document (LDD). This SPD seeks to give further guidance and advice only on the policies within the SGLP. It is, however, also written in the light of such material as current national, regional and strategic guidance and the Draft South Gloucestershire Sustainable Community Strategy.

Meeting the needs and ensuring a sufficient variety of house types and sizes to achieve mixed and balanced communities is a high priority for the Council. Across the Council a corporate approach is employed towards the provision of affordable housing. The Housing Strategy 2008 - 2013, together with the Enabling Strategy 2005/06 - 2009/10 and the Rural Affordable Housing Strategy 2007/08 - 2009/10 describe how the Council will use its enabling powers to meet housing needs in the area. A community’s need for affordable housing is a material consideration in preparing local planning policies and in determining planning applications.
The Local Plan forms part of the Development Plan and to ensure the transition between policies in the Local Plan and the Local Development Framework (LDF), Local Plan policies including H6 and H7 are “saved”.

This document is not intended to provide guidance on the forthcoming Core Strategy to be produced by the Council. These policies will receive more detailed guidance in a future Affordable Housing SPD to be produced by the Council at a later date.

SPDs do not have the same status as Development Plan Documents and therefore do not need to be subject to independent examination. However, very similar procedures of community involvement and Sustainability Appraisal are still required.

2.1 Aims and Objectives

The planning system aims to develop stable, balanced communities where all sections of society, regardless of their wealth, occupation or background, feel included (PPS3 Para 9). Planning for adequate and appropriate affordable housing plays a central role in maintaining an inclusive society. Good design and siting of affordable housing within residential and mixed-use developments creates vibrant, interesting and engaging communities in which to live and work.

In addition to the above, the Council has produced its Sustainable Community Strategy, which sets out the Council’s priorities until 2026, amongst which is that of managing future development. In relation to future housing development, the Council plans to meet the housing needs of existing and future residents and to enable an adequate supply of affordable and supported housing, ensuring that all new developments deliver the number, type and range of affordable housing required. The Housing Strategy 2008 - 2013, which gives more detail to these plans, states that its top priority is to meet the need for affordable homes. This SPD is a key document in the delivery of affordable housing.

3. Planning Context

Government advice outlined in Planning Policy Statement 3 (PPS3) Housing (November 2006) provides the context for the delivery of affordable housing. The objectives can be summarised as follows:

The provision of adequate housing at a price that people can afford and in a community where people wish to live is one of the keys to delivering sustainable development. Housing is one of the biggest users of development land and the planning system is tasked with delivering well designed, high quality housing, a mix to accommodate a wide variety of households, a flexible land supply to ensure a sufficient quantity of housing, and locations which have good access to jobs, services and infrastructure and offer a range of community facilities. PPS3 highlights the Government’s continuing commitment to provide affordable housing.

Further Government advice and guidance on the delivery and affordability of affordable housing is contained in the companion publications to PPS3, Delivering Affordable Housing (Department for Communities and Local Government (CLG), November 2006) and Strategic Housing Market Assessment Practice Guidance Version 2 and Annexes (CLG, August 2007).

Regional Planning Guidance (RPG 10) for the South West Policy H03 states that: *Local Authorities, social housing providers and other agencies in their relevant

contain provisions to ensure that the developer enter into contract with the RSL or AHP and transfers the affordable housing before the relevant percentages of permitted dwellings have been completed.

10.9 Committee reports

Where planning permission is sought for a proposal that requires the provision of affordable housing, officers will prepare a report to the relevant committee which states how the affordable housing is to be secured.

10.10 Legal agreements

Pre-application discussions are greatly encouraged. The Council’s Statement of Community Involvement (SCI) sets out its approach to consultation. Chapter 4 deals specifically with consultation on Planning Applications. Early negotiation, resolution and drafting of the legal agreement is also encouraged (PPS3 Annex C: Para 50). The terms and obligations for the delivery of the affordable housing, including trigger points and monitoring requirements, will be set out in a legal agreement made between the owner of the land and the Council.

11. Monitoring and Review

The Government expects local authorities to monitor the provision of all housing provision through the planning system. Under the Planning and Compulsory Purchase Act 2004, this will take place as part of the Annual Residential Land Availability Survey and Annual Monitoring Report (AMR). The Council already monitors affordable housing completions, by tenure and whether delivered through the planning process or publicly funded. Subsidy details are recorded. The results are made publicly available through the AMR and published performance indicators.

The Council will actively monitor the provision and delivery of affordable housing to ensure that the procedures for implementing affordable housing are up to date and meeting the Council’s targets. The AMR will identify the key challenges and opportunities for the provision of Affordable Housing and revisions to be made. Market conditions and levels of affordability will also be kept under review.

The Council will monitor the management obligations of our preferred partner RSLs and will, from time to time, review our preferred partners to ensure high standards of service delivery. In particular, the Council will require annually, from the RSL or other affordable housing manager, information relating to:

- Target rents
- Rent increases
- Staircasing and other sales receipts
- Management standards

Developers’ delivery partners, whether RSL or other provider/manager (AHP/ AHM), will be similarly monitored in relation to specific sites through the obligations contained in legal agreements.

This guidance will be kept under review in the light of all future material information and guidance.
1. Status

This Affordable Housing Supplementary Planning Document (SPD) is a Local Development Document, prepared in line with the provisions of the Planning and Compulsory Purchase Act 2004; and The Town and Country Planning (Local Development) (England) Regulations 2004. It forms part of the South Gloucestershire Local Development Framework (LDF), along with the Adopted Local Plan and other emerging local development documents.

The SPD is consistent with the existing affordable housing policies H6 and H7 of the adopted South Gloucestershire Local Plan 1996 to 2011 (SGLP). The SPD was adopted by South Gloucestershire Council on 2 September 2008 and replaces the Council's existing Draft Affordable Housing Supplementary Planning Guidance (2002). As a Supplementary Planning Document, it will be a material consideration in the determination of planning applications, alongside other documents in the LDF.

2. Introduction

The SGLP includes policies H6 and H7 that relate to the provision of affordable housing through the planning process. The purpose of this SPD is to advise all involved in the delivery of affordable housing, from applicants to Council officers, on how the Council will apply the policies of the SGLP to improve the delivery of affordable housing, by:

- Providing clarity to existing Local Plan affordable housing policies;
- Providing a summary of national, regional and local plan policies relating to affordable housing;
- Clarifying the definition of affordable housing;
- Outlining the Council's preferred methods for ensuring the delivery of affordable housing;
- Setting out the Council's affordable housing monitoring targets to be included in the Annual Monitoring Report.

12. Glossary

**Affordable housing** - Housing provided, with subsidy, for local people who are unable to resolve their housing needs in the open market because of the relationship between housing costs and income.

**Affordable Housing Manager** - An organisation which may or may not be a Registered Social Landlord but whose management standards are acceptable to the Council and which manage affordable housing transferred to it by a AHP or RSL.

**Affordable housing providers (AHPs)** - Providers of affordable housing which are not necessarily Registered Social Landlords but will deliver the affordable housing on site.

**Annual monitoring report (AMR)** - Information on the implementation of the policies of the Local Development Framework (LDF).

**Code for sustainable homes** - A new national standard for sustainable design and construction of new homes. Since April 2007 the developer of any new home in England can choose to be assessed against the Code. The Code uses a 1 to 6 star rating system to communicate the overall sustainability performance of a new home.

**Delivering Affordable Housing (DAH)** - A companion document to PPS3, published by DCLG in November 2006, which provides more detailed guidance on the delivery of affordable housing.

**Department for Communities and Local Government (DCLG)** - The Government department with specific responsibility for communities and local government, covering planning, housing and regeneration.

**Design and quality standards** - The Housing Corporation's standards for affordable housing, which apply from 1 April 2008 and replace the previous Scheme Development Standards.

**Dwelling** - A dwelling is defined (in line with the 2001 Census) as a self-contained unit of accommodation. Self-containment is where all rooms (including kitchen, bathroom and toilet) in a household's accommodation are behind a door which only that household can use. Non-self contained household spaces at the same address are counted together as a single dwelling. Therefore a dwelling can consist of one self-contained household space or two or more non-self contained household spaces at the same address.

**Enabling strategy** - The Council's strategy for meeting the needs and aspirations of the people of South Gloucestershire for affordable homes.

**ExtraCare** - Self-contained accommodation which provides flexible care and support arrangements to meet the increasing needs of people whilst enabling them to stay in their homes as they get older. (Department of Health, Care Services Improvement Partnership, Housing Learning and Improvement Network: Fact Sheet 6 – Design principles for ExtraCare.)

**HomeBuy agents** - RSLs appointed by the Housing Corporation for a Housing Market Area to market intermediate housing to eligible households.

**HomeChoice** - The Council's choice based lettings system. The Council's waiting list of applicants is known as the HomeChoice Register. (http://homechoice.southglos.gov.uk)

**HomesWest** - A partnership of four RSLs selected by the four local authorities of the West of England to develop strategic and other large sites in the West of England area.

**Housing Corporation** - An organisation set up by the Government to regulate the activities of RSLs/HAs and administer the subsidy (known as Social Housing Grant) help them develop new affordable homes.

**Housing Needs Survey (HNS)** - Study to assess the level and type of housing need in South Gloucestershire.

**Housing needs register/Housing waiting list** - A register of all households seeking affordable homes in South Gloucestershire.
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Housing Quality Indicator (HQI) - A measurement and assessment tool designed to allow housing schemes to be evaluated on the basis of quality rather than simply of cost. The HQI assesses the quality of a housing project using three main categories: location, design and performance. These are subdivided into ten sections - the indicators. An HQI assessment generates separate scores for each indicator producing a profile of the scheme, and an overall HQI score. The system was developed on behalf of the Department for Transport, Local Government and the Regions (now Communities and Local Government) and the Housing Corporation.

Housing Strategy 2004 - 2009 - The Council’s detailed proposals to address the housing needs of the whole community in the South Gloucestershire area.

Intermediate affordable housing - Affordable housing which is defined in PPS3 as being at prices and rents above those of social rent but below market prices or rents and which can include shared equity products (e.g. HomeBuy), shared ownership, discounted sale and intermediate rented homes.

John Herington Associates Housing Needs Survey (JHAHNS) - A study commissioned by South Gloucestershire Council to identify the current and future housing needs within the district to help develop the Council’s housing strategy and local plan. The findings were reported in March 2004.

Key workers - Defined by the Government as those eligible for the Housing Corporation funded Key Worker Living programme and others employed in the public sector identified by the Regional Housing Board.

Lifetime homes standard - A standard of housing established by the Joseph Rowntree Trust which would enable someone with physical or sensory impairment to live comfortably in their home or for the home to be easily adapted to meet their needs.

Local Development Document (LDD) - Sits within the LDF portfolio and comprises Development Plan Documents (DPDs) that have been subject to independent testing and have the weight of development plan status and Supplementary Planning Documents (SPDs) which are not subject to independent testing and do not have development plan status.

Local Development Framework (LDF) - The Local Development Framework is replacing the previous development plan system and contains detailed policies and proposals to guide development in South Gloucestershire.

Local Development Scheme (LDS) - The Local Development Scheme explains how and when South Gloucestershire Council will be producing its Local Development Framework.

Local Plan Inquiry (LPI) - Between June 2003 and September 2004 a public local inquiry, chaired by an independent Government planning inspector, was held into objections to the South Gloucestershire Local Plan. The Inspector’s Report was subsequently received in November 2004 and published in December 2004. Following consideration of the inspector’s recommendations and a period of modifications the SGLP was adopted in January 2006.

Market housing - Private housing for rent or for sale, where the price is set in the open market.

Planning Policy Statement 3 (PPS3) - Planning Policy Statement 3: Housing sets out the national planning policy framework for delivering the Government’s housing objectives, including those for affordable housing.

Regional Housing Body - The Regional Housing Body sets priorities for housing investment in the South West.

Regional Planning Guidance number 10 (RPG10) - Provides the regional framework within which local authority development plans and local transport plans in the South west should be prepared. RPG10 now forms part of the legal development plan and is known as the Regional Spatial Strategy for the South West.
Regional Spatial Strategy (RSS) - Currently being prepared for the period 2006 to 2026 that will set out the regional plan for development within the South West.

Registered social landlord (RSL)/Housing association (HA) - A not for profit organisation, usually a housing association, registered by the Housing Corporation to provide affordable housing.

Rural exception schemes - Small scale housing schemes for permanent affordable housing to meet a local need within or adjoining the boundaries of villages permitted as an exception to normal planning policy.

S106 agreement - A legal document binding developers and the Council into carrying out specific works or payments of money that are necessary to allow the development to go ahead.

Secured by Design (SBD) - A Police flagship initiative supporting the principles of “designing out crime”. It uses effective crime prevention and security standards for a range of applications including individual houses and residential sites. Schemes are certified by the Police architectural unit.

Service level agreement - An agreement between the Council and RSLs developing, or proposing to develop, in South Gloucestershire. It provides a framework for the partnership working between South Gloucestershire Council and RSLs operating in South Gloucestershire, specifically in relation to the operation of a common housing register and the allocation of social rented housing.

Shared ownership (New build homebuy) (NBHB) - A form of affordable housing which is partly sold and partly rented to the occupiers.

Social rented housing - Rented housing, owned and managed by local authorities and registered social landlords (RSLs), for which guideline target rents are determined through the national rent regime. It may also include rented housing owned or managed by other persons and provided under equivalent rental arrangements to the above, as agreed with the local authority or with the Housing Corporation as a condition of grant.

South Gloucestershire Housing Partnership (SGHP) - A partnership between the Council and RSLs developing, or proposing to develop in South Gloucestershire, which have been selected according to a competitive process on the basis of their good management practice, and which the Council will support in their bids to the Housing Corporation for Social Housing Grant.

South Gloucestershire Local Plan (SGLP) - A document that sets out the current adopted local planning policies for the South Gloucestershire to 2011.

Strategic Housing Market Assessment (SHMA) - An assessment of the estimated demand for market housing and need for affordable housing in a defined geographical area, in terms of distribution, house types and sizes and the specific requirements of particular groups and which considers future demographic trends.

Supplementary Planning Document (SPD) - A document that supplements and elaborates on policies and proposals in development plan documents.

Sustainability appraisal (SA) - An appraisal of the social, environmental and economic effects of the strategies and policies of a local development document from the outset of the preparation process. It incorporates the requirements of the European Environmental Assessment Directive.

Target rents - Guideline rents for social rented housing, determined through the national rent regime contained in the Three Year Review of Rent Restructuring which became policy in April 2006. They are calculated with reference to local incomes and house prices.

West of England - A sub-region which encompasses the administrative areas of South Gloucestershire Council, Bristol City Council, Bath and North East Somerset Council and North Somerset Council.

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Appendix 1

Extract from the South Gloucestershire Local Plan 1996-2011 - affordable housing text and policies

H6 THE COUNCIL WILL SEEK AN ELEMENT OF SUBSIDISED AFFORDABLE HOUSING TO MEET LOCAL NEEDS ON ALL NEW HOUSING DEVELOPMENTS OF 15 OR MORE DWELLINGS OR 0.5 HECTARE OR MORE, IRRESPECTIVE OF THE NUMBER OF DWELLINGS, (EXCEPT IN SETTLEMENTS IN RURAL AREAS WHERE THE THRESHOLD WILL BE 5 OR MORE DWELLINGS OR 0.2 OF A HECTARE). ON THOSE SITES ALLOCATED IN POLICY H1, THE COUNCIL WILL NEGOTIATE WITH DEVELOPERS ON THE BASIS OF A TARGET OF 33.3% OF THE DWELLINGS PERMITTED. ON "WINDFALL SITES", NEGOTIATIONS WILL ALSO BE BASED ON A TARGET OF 33.3% OF DWELLINGS SUBJECT TO THE HOUSING NEEDS OF THE AREA. PERMISSION WILL BE SUBJECT TO CONDITIONS OR A PLANNING OBLIGATION WILL BE NEGOTIATED TO ENSURE SUCH HOUSING IS RESERVED FOR FIRST AND SUBSEQUENT OCCUPIERS WHO NEED IT. IN SEEKING TO NEGOTIATE THE MAXIMUM LEVEL OF AFFORDABLE HOUSING ON EACH SITE THAT IS FEASIBLE UP TO THESE TARGETS THE COUNCIL WILL HAVE REGARD TO THE ECONOMIC VIABILITY OF SITE DEVELOPMENT, LIKELY COSTS, EXISTING MARKET CONDITIONS, THE AVAILABILITY OF PUBLIC SUBSIDY AND THE AIM OF ACHIEVING BALANCED AND STABLE COMMUNITIES.

8.183 A Community’s need for a mix of housing types, including affordable housing is a material planning consideration, which should be taken into account in formulating development plan policies (PPG3 “Housing” para.14). This guidance is supplemented by practical advice set out in Circular 6/98. The Joint Replacement Structure Plan requires Local Plans to include policies and targets for specific sites to help meet the need for affordable housing identified by local assessments.

8.184 The Government’s definition of “affordable housing” encompasses both low-cost market housing and subsidised housing (irrespective of tenure, ownership or financial arrangements) that will be available to people who cannot afford to rent or buy houses generally available on the open market. All other housing is referred to as general market housing (Circular 6/98). The Council acknowledges this definition. Other policies in the Plan (H1 and H2) encourage densities which will require an element of low-cost market housing in the form of small units (flats and terraced dwellings).

8.185 The Council commissioned John Herington Associates in March 2003 to undertake a new HNS for South Gloucestershire. Households were surveyed in May 2003 using two different methods in parallel:

- Personal or face-to-face interviews were used in the two sub-areas comprising the Bristol Principal Urban Area (PUA) where the local plan strategy seeks to locate most new housing development (i.e. the North Fringe and the East Fringe). 1,119 door-to-door interviews were successfully completed across the two sub areas.
- Postal surveys were used across the rest of South Gloucestershire comprising Yate, Chipping Sodbury, Thornbury and the smaller settlements/rural areas. 2,176 postal-survey questionnaires were completed and returned.

8.186 To complete the HNS JHA also undertook, inter alia:

- an analysis of the findings of the two household surveys;
- a housing market appraisal (house prices and rent levels in May/June 2003);
- an assessment of different levels of affordability;
- an assessment of the current backlog of unmet need;
- an analysis of the profile of households in housing need;
- a forecast of emerging need for affordable housing;
- an assessment of the supply of affordable housing; and
8.187 The JHA HNS concludes that over the period (2003-2011) South Gloucestershire faces a shortfall in the average supply of new subsidised affordable homes of between 970 and 1,270 dwellings per annum (7,758 to 10,156 in total) i.e. to meet emerging need and address unmet backlog need (at 20% per annum) (JHA HNS paragraphs 5.27 and 5.28). Full details of the survey methodology and findings and the analyses listed above are set out in the final report (South Gloucestershire Council: Housing Needs Survey 2003 - JHA March 2004). These figures do not include unsubsidised low-cost market housing which will not, by definition, meet the needs of those who cannot afford to buy or rent housing on the open market.

8.188 All allocated sites are considered suitable for subsidised affordable housing in terms of their location and size. It is also assumed that all windfall sites will be located within the urban areas or defined settlement boundaries (ref. Policy H2) and all those of 15 or more dwellings or 0.5 hectares or more (irrespective of the number of dwellings) will be suitable for affordable housing. It is estimated that at April 2004 these sites (allocated and windfalls) have the potential to deliver 6,655 dwellings in the period 2004-2011. This is generally referred to as the "leeway" for negotiating affordable housing.

8.189 In purely numerical terms, it is clear that even if all the eligible sites (or the 'leeway') were required to deliver 100% affordable housing (6,655 units), this would still fall some considerable way short of the most favourable forecast of need of 6,790 affordable dwellings (2004-2011). It is clearly impossible in these circumstances to translate the level of need identified in the HNS directly into a Local Plan target for 2003-2011 and a percentage target for suitable sites.

8.190 The Council’s objective in these circumstances is therefore to seek the maximum level of affordable housing on each site that is feasible having regard to the economic viability of site development, likely costs (including other Section 106 obligations) existing market conditions, and the availability of public subsidy.

8.191 The resources available to meet the need for subsidised affordable homes in South Gloucestershire in terms of suitable publicly owned land and Social Housing Grant are likely to be severely limited for the foreseeable future. In these circumstances the Council’s Housing Strategy identifies the planning process as having an important role to play in seeking to close the gap between supply and demand. Having considered expert estates/valuation evidence on the economics of provision of affordable housing, the Local Plan Inspector concluded that up to 33.3% subsidised affordable housing would generally be viable over the range of sites allocated in Policy H1 and those likely to come forward as windfalls.

8.192 The overall target of approximately 2,216 is therefore based on: 33.3% of the number of units required in the period (2004-2011) on the allocated sites listed in Policy H1 which are all considered suitable in terms of size and location and 33.3% of anticipated windfall completions on eligible sites i.e. the maximum level of provision which is considered feasible.

8.193 In accordance with PPG3 and Circular 6/98, Policy H6 does not prescribe the type of affordable housing by reference to tenure. In seeking to negotiate subsidised affordable housing on a site-by-site basis the Council will have regard to the identified housing need in the area, by reference to the JHA HNS and other relevant up-to-date information held by the Housing Department. In practice, the type of subsidised affordable housing being sought will be aimed at addressing a range of needs and will accordingly cover a range of tenures including social rent, shared ownership, intermediate/near market rents and discounted home ownership.

8.194 The policy is not intended to preclude the provision of subsidised affordable housing on sites which fall below the thresholds but which would otherwise be suitable. Indeed the Council will encourage provision on such sites. In addition to subsidised affordable housing, Policy H1 (minimum average net density targets) and Policy H2 encourage the provision of lowcost
market housing (without a discount) such as flats and smaller terraced housing. The provision of such housing, by definition, will not meet the needs of those who cannot afford housing on the open market but will help meet a separate need and provide a better range of market access properties.

8.195 The Council will not discriminate between proposals for market housing and affordable housing when applying the design considerations set out in Policy D1. It will be flexible in its consideration of parking requirements (ref Policy T8) on sites well served by public transport and services. The Council will also encourage the conversion and re-use of vacant buildings on suitable sites for affordable housing in accordance with Policy H5.

8.196 Where it is proposed to phase development, sub-divide sites or where there is a reasonable prospect of adjoining land being developed for residential purposes in tandem, the Council will take the whole site for the purpose of determining whether the scheme falls above or below the thresholds.

8.197 Settlements in rural areas are defined as those listed at Paras 8.157 to 8.159 of the Plan and defined on the Proposals Map. With the exception of Winterbourne, Coalpit Heath and Frampton Cotterell, all these settlements have been designated as ‘small rural settlements’ under the Housing (Right to Acquire or Enfranchise) (Designated Rural Areas in the South West) Order 1997 (Circular 6/98 Para 10 and footnote 8). The adoption of the lower threshold of 5 dwellings/0.2 ha for all the settlements listed at Paras 8.157 to 8.159 is justified because of the level of need arising in the rural areas as identified in the JHA HNS and the severely limited scope for windfall sites coming forward above the higher threshold of 15 dwellings/0.5 ha.

8.198 The Council will seek to secure the provision of subsidised affordable housing through the imposition of conditions or the negotiation of a planning obligation. In negotiating with landowners and developers, the Council will consider a range of alternative arrangements that will achieve delivery of affordable housing to meet local needs. The Council intends to prepare planning guidance that will explain these arrangements in more detail.

8.199 The Council will normally seek provision of subsidised affordable housing as part of the overall development, well integrated with and indistinguishable, as far as possible, from neighbouring open-market housing. Moreover, on larger sites, the Council will encourage provision in a number of small clusters, rather than in one large scheme. Alternative provision off-site, including a financial or other contribution, will only be considered as a last resort and where there is the clear prospect of this being translated into the provision of affordable housing and on a scale not less than that which would have been expected on the site in question. Such an arrangement might also assist in meeting other plan objectives in securing the conversion/re-use of vacant buildings in accordance with Policy H5.

H7 SMALL SCALE PROPOSALS FOR PERMANENT AFFORDABLE HOUSING TO MEET A LOCAL NEED WILL BE PERMITTED AS AN EXCEPTION, ON SITES WITHIN OR ADJOINING THE BOUNDARIES OF VILLAGES, AS DEFINED ON THE PROPOSALS MAP. SUCH SCHEMES WILL NOT BE PERMITTED ON SITES WITHIN THE GREEN BELT EXCEPT ON SITES WITHIN OR ADJOINING THOSE EXISTING VILLAGES OR SMALL SETTLEMENTS WITH DEFINED SETTLEMENT BOUNDARIES, WHERE THE SCHEME IS SMALL SCALE, WHERE IT WOULD MEET AN IDENTIFIED NEED THAT CANNOT BE MET OUTSIDE THE GREEN BELT AND WHERE IT WOULD BE CONSISTENT WITH THE FUNCTIONS OF THE GREEN BELT. PERMISSION WILL BE SUBJECT TO CONDITIONS, OR A PLANNING OBLIGATION WILL BE NEGOTIATED, TO ENSURE SUCH HOUSING IS RESERVED IN PERPETUITY FOR THOSE IN AFFORDABLE HOUSING NEED.

8.200 PPG3 ‘Housing’ confirms that Local Authorities may include policies which seek to encourage provision of affordable housing to meet local needs in rural areas where there are unlikely to be development sites of sufficient scale to trigger the arrangements set out at Policy H6 (PPG3 para. 18 and Annex B). This guidance is supplemented by practical advice set out in Circular 6/98.
8.201 The policy provides for an exception to be made to Policy H3 which otherwise prevents the provision of housing outside settlement boundaries to meet general housing demand. It does not override the other restrictive policies in the plan and Criteria A to E set out in Policy H2 will still apply. The policy does not override the general presumption against inappropriate development within the Green Belt. However, the Council acknowledges that very limited infill development might be appropriate within existing settlements ‘washed over’ by the Green Belt. These settlements are listed at paras 8.158 and 8.159.

8.202 It is particularly important that schemes should be well related to the scale, form and character of the village concerned and pay particular regard to those factors which give rural villages their local distinctiveness. The identification of appropriate sites and design principles will best be achieved through an appraisal of the whole village concerned such as that undertaken in the preparation of a ‘Village Design Statement’ (see in particular Design Policy D1 and, for sites in or adjoining conservation areas, Policy L12). Consequently, acceptable schemes are likely to be small in scale i.e. in most cases no more than 5 dwellings.

8.203 The Council will require any proposal for a Rural Exceptions Affordable Housing Scheme to be consistent with a recent approved local housing needs survey relating to the village or parish (or group of villages or parishes) within which the scheme is proposed. Where appropriate the Director of Housing may offer advice and support on the conduct of a local housing needs survey. The survey must demonstrate that there is a genuine local need for affordable housing within the village/parish (or group) from people who are or have previously been closely connected with the village through work or residence, or need to continue to work or clearly demonstrated that the need cannot be met from development within the boundary of the village.

8.204 The type of housing proposed should reflect closely the conclusions drawn from the respective local housing needs survey and the site’s suitability. Environmental considerations, however, may be a limiting factor on larger schemes which would otherwise be justified on the basis of local need.

8.205 It is intended that any accommodation built under these arrangements should remain at an affordable rent or at a price below that prevailing on the open market such that it meets the need demonstrated in any survey. Consequently, landowners will be expected to enter into a planning agreement restricting occupation to people who are or have previously (within the last five years or for an extended period during childhood) been closely connected with the parish within which the scheme is proposed and who are otherwise unable to meet their housing needs locally. For the purposes of this policy, the term ‘local’ is taken to mean the parish within which the scheme is proposed. Closely connected is defined in more detail in the Council’s published Model Section 106 Agreement dealing with Rural Exception Schemes. A cascade approach will be adopted under which eligibility criteria will be widened if housing remains unoccupied for a certain period of time. The Council's model Section 106 Agreement is therefore framed in such a way to enable people who are in housing need but closely connected with adjoining parishes to be eligible for consideration where circumstances change over time such that no one within the original parish meets the criteria. Registered Social Landlords (RSLs) can play a valuable role in ensuring the long-term affordability of the properties.

8.206 In all cases, the Council will consider removing permitted development rights concerning the future extension of dwellings, thereby retaining additional control over affordability. The Council will also consider imposing a time limit on the implementation of schemes in order to ensure that a delayed scheme reflects any change in local needs.

8.207 The Council intends to prepare planning guidance concerning the carrying out of local housing needs surveys and setting out the various options for controlling occupancy and long term availability in different circumstances.
Appendix 2

Below is an example of the summary of requirements for affordable housing provided under Policy H6 and which would form a starting point for negotiations on applications which meet the threshold for an affordable housing contribution. Such a summary would be provided at the initial enquiry stage.

Summary of requirements

• All affordable housing delivered through planning obligations to be in line with the definitions contained in PPS3

• Any low cost market housing will be in addition to the affordable housing provision

• 33.3% affordable housing to be provided on site in line with Local Plan Policy H6 and the findings of the JHA Housing Needs Survey 2004.

• Tenure split 77.4% social rent/22.6% intermediate housing which reflects the local housing need identified in the JHA Housing Needs Survey 2004.

• A range of units to meet local housing need based on the preferred mix as a result of the findings from JHA Housing Needs Survey 2004 are listed below.

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Type</th>
</tr>
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<tbody>
<tr>
<td>10%</td>
<td>1 bed flats</td>
</tr>
<tr>
<td>0%</td>
<td>2 bed flats</td>
</tr>
<tr>
<td>29%</td>
<td>2 bed houses</td>
</tr>
<tr>
<td>12%</td>
<td>3 bed houses</td>
</tr>
<tr>
<td>31%</td>
<td>4 bed houses</td>
</tr>
<tr>
<td>18%</td>
<td>Wheelchair units</td>
</tr>
<tr>
<td>100% Total</td>
<td></td>
</tr>
</tbody>
</table>

• The affordable housing will be delivered without the need to rely on any public subsidy.

• 100% of initial occupants to be nominated by SGC. Depending on the need at the time, we would seek wheelchair units as listed above.

• The affordable housing should be distributed across the site in clusters of no more than 6 units, unless a specific pepper potting strategy is approved by SGC.

• Design and specification criteria: All units to built in line with the same standards as the market units (if higher) and to comply fully with the latest Housing Corporation standards applicable at the time the S.106 will be signed or 6 months prior to start on site whichever date is the later, to include at least Level 3 Code for Sustainable Homes, Lifetime Homes standard, building for life assessments, and full compliance with the RSL design brief.

• Delivery is preferred through a RSL – the Council encourages the developer to work with Homes West RSL (see SPG Appendix 1) on sites over 30 units or from the South Gloucestershire Housing Partnership on smaller sites. In the event of the developer choosing an Affordable Housing Provider from outside of these partnerships then the Council will set the detailed management standards that will be required.

• Phasing - the affordable housing should be built at the same time as the rest of the housing on site in line with agreed triggers as per S106 agreement with a detailed assessment on the site by site basis.
The Council will define affordability outputs in the S.106 agreement and currently (as of November 2007) that would be:
- social rents to be set at target rents
- intermediate home ownership: no more than 40% of the market value will be payable by the purchaser so that the units are affordable to those in need of intermediate housing. It is clear that 40% equity shares represent the top slice of households that can afford this option and therefore a range of lower cost intermediate housing will be sought. The annual rent on the equity retained by the RSL should be no more than 1% of the unsold equity. This approach is supported by the JHA Housing Needs Survey 2004.
- Any other models of intermediate housing will need to meet similar affordability levels as for intermediate home ownership other than intermediate rented housing that will be delivered at a maximum of 75% of the cost of full market housing (November 2007).

Social rented accommodation to be retained as affordable housing in perpetuity. Right to Acquire does not apply where no public subsidy provided.

Any capital receipts from the sale of affordable housing to be recycled as capital expenditure on approved affordable housing schemes in South Gloucestershire, on the basis that the subsidy increases by any capital appreciation on that subsidy.
Appendix 3

Summary of Housing Needs

This Appendix includes the Executive Summary of the John Herington Associates Housing Needs Survey.

The complete Housing Needs Survey is available on the South Gloucestershire public website as the following documents:

Housing Needs Forecast Validation 2006

Section 1: Introduction

Section 2: Key findings from the household survey

Section 3: The costs facing households in the local housing market area

Section 4: Backlog of Affordable Housing Needs

Section 5: Forecast of newly arising housing need

Section 6: Profile of households in housing need and their requirements for affordable housing

Section 7: Strategic implications for Local Plan policies

Appendix 1: Response levels and grossing factors

Appendix 2: Filtered sample and affordability calculations, unregistered housing need

Appendix 3: Sensitivity testing

Appendix 4: Validation checks on household surveys

These documents can be accessed on the Housing page (click H in the Main Topics index at the top of the home page) under ‘New Affordable Homes’, or through following link:

http://www.southglos.gov.uk/NR/exeres/bd83d3a4-6a03-49ae-9e12-6a0c3d7ff47
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1. SCOPE OF THE RESEARCH

This report contains a summary of the main findings from the survey of housing needs conducted on behalf of South Gloucestershire District Council by John Herington Associates (JHA). A full technical report has been produced which considers all aspects of the Survey, the findings and their strategic implications in depth.

At an early stage in the research, it was agreed, in consultation with Officers, that the District should be broken down into five sub-areas, two urban areas and three rural areas, as shown in the Map on page 10 of this summary.

The overall aim of the surveys was to identify the extent of current and future housing need within the urban and rural sub-areas of the District.

In order to fulfill the Council’s brief, John Herington Associates (JHA) used a ‘twin tracking’ survey design, which they have used in other local authorities containing a mix of urban and rural areas. This involved two surveys undertaken at the same time:

- **Face to face interviews in the Bristol East and North Fringes** where most Structure Plan housing requirements will be met.

- **Postal surveys in all the Rural Areas**, covering Chipping Sodbury and Yate, Thornbury and the remaining Rural Areas.

Within each sub-area, JHA carried out..........

**Housing market appraisals** to identify variations in house prices, private market and social rents and shared ownership costs at the time the survey was undertaken – comparisons were made to cross-boundary housing markets and regional house prices.

**Assessments of the affordable housing need** arising in each sub-area, using information about the relationship between local incomes and housing costs.

**Forecasts** of the emerging need for new affordable dwellings over the periods 2003-2008 and 2008-2011; these involved using scenario-building of different assumptions about likely changes in the housing market.

In addition, JHA provided the Council with information about the **appropriate mix of house types/sizes and tenures** required to address future housing needs; recommendations on affordable dwelling mix are based upon the incomes of households in backlog need and on assumptions about the different types of housing which the market might be prepared to deliver in the future.

JHA also evaluated the implications of the Survey for the development of the **Council’s affordable housing policies contained within the Local Plan**.
2. THE HOUSEHOLD SURVEYS

The interview survey targeted 1,182 homes randomly across the urban sub-areas, and interviews were successfully completed at 1,119 homes, a response level of 95%.

The postal survey targeted 7,168 addresses across the rural sub-areas and 2,176 postal forms were returned complete for analysis, a 30% response.

<table>
<thead>
<tr>
<th>Sub-Areas</th>
<th>Target Sample</th>
<th>Responses Achieved</th>
<th>% of Target Achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filton/Patchway/Bradley Stoke/Stoke Gifford area</td>
<td>579</td>
<td>558</td>
<td>96.4%</td>
</tr>
<tr>
<td>Downend/Mangotsfield/Staple Hill/Kingswood/Hanham/Longwell Green area</td>
<td>603</td>
<td>561</td>
<td>93.0%</td>
</tr>
<tr>
<td><strong>Total Urban</strong></td>
<td><strong>1,182</strong></td>
<td><strong>1,119</strong></td>
<td><strong>94.7%</strong></td>
</tr>
<tr>
<td>Chipping Sodbury and Yate</td>
<td>1,997</td>
<td>555</td>
<td>27.8%</td>
</tr>
<tr>
<td>Thornbury</td>
<td>1,991</td>
<td>644</td>
<td>32.3%</td>
</tr>
<tr>
<td>Rural Areas, Greenbelt and Cotswolds</td>
<td>3,180</td>
<td>977</td>
<td>30.7%</td>
</tr>
<tr>
<td><strong>Total Rural</strong></td>
<td><strong>7,168</strong></td>
<td><strong>2,176</strong></td>
<td><strong>30.4%</strong></td>
</tr>
<tr>
<td><strong>District Total</strong></td>
<td><strong>8,334</strong></td>
<td><strong>3,295</strong></td>
<td><strong>39.5%</strong></td>
</tr>
</tbody>
</table>

Comparison with the 2001 Census confirmed that both the samples achieved were broadly correct and in line with expected tenure patterns. This allows the Council to be confident that no groups have been seriously under or over-represented in the samples.

3. KEY FINDINGS

Some of the main findings from Section 2 of the main report are given below - where appropriate the Survey responses have been grossed up.

**Population**

Based upon the survey findings, JHA estimate that the population at the time of the survey in 2003 was 251,369. This compares to the 2001 Census population figure of 245,641.

**Black Minority Ethnic Groups**

The Housing Needs Survey 2003 identified that the Black Minority Ethnic population is 4.2% of the total population.

**Key workers**

14.9% of households in South Gloucestershire contain someone who falls within the Council’s definition of a key worker.

**Incomes**

79% of households responded to the income question, an improved response on the 1998 Survey figure of 75%.

The average annual gross income of all households responding to the survey in 2003 was **£21,919**. This includes all occupations and households who are not working and is close to the 2001/2 average disposable household incomes of **£22,048** for the South West region.
- 20% of all households have average incomes below £10,400 (18% in the 1998 Survey) indicating that low income households have become poorer over the last 5 years.

- 31% of all households have average incomes above £31,200 (27% in the 1998 Survey) suggesting that households on the highest incomes have seen an improvement in their income over the past 5 years.

CURRENT AFFORDABILITY

Owner occupiers

35% of owner occupiers are outright owners with no outstanding mortgage payments. The average mortgage paid is £389 a month and owner occupiers paying a mortgage are spending about 16% of their annual gross income on mortgage payments. The average income of mortgage payers is £28,807. The income of all owner occupiers with a mortgage in England was £31,460 (English House Condition Survey, 2003).

Private renting

9.5% of households privately renting said they paid nothing for their housing costs. The average private rents paid were £468 a month or £108 a week.

Private renting households spent an average of 28% of their incomes on private renting – the average income of households paying private rent is £19,858. The average income of all private renting households in England in 2003 was £21,528 (English House Condition Survey, 2003).

Social renting

15.8% of households in social renting said they paid nothing for their housing costs. The average rent paid by all social renting households was £57.50 a week or £249 a month.

Social renters are paying an average of 38% of their net annual incomes for their present accommodation. The average income of social renting households is £7,789 including benefits, with average repayments of £2,988 a year.

PROBLEMS WITH THE PRESENT HOME

15% of all households in the District are living in unsuitable properties and/or needing adaptations, an estimated 15,781 households in South Glos.

SOLUTIONS

Some households in unsuitable housing are able to find a solution to their housing problems in improvements or adaptations to their current dwelling without moving. About 20% are able to afford to move from their current home.

Improvements at home

An estimated 2,858 households, 18% of households living in housing that did not meet their needs, judged that making improvements to their home would be necessary. 47%, an estimated 1,222 households, said they are unlikely to be able to afford the cost of the improvements or adaptations they required to meet their housing needs.

Of itself, this self-reporting is indicative of the difficulties facing households in unsatisfactory housing who require improvements to the existing stock.
Moving to another dwelling

JHA estimated that 4,821 existing households face problems with their present home and need to move.

A further 2,939 concealed households need to move now or within the next 12 months (a total of 7,240 concealed households, 7.0% of all households in South Gloucestershire, are estimated to require separate accommodation, the great majority within the next 5 years).

Special Needs

16.5% of households in South Gloucestershire contained at least one member of the household who is frail elderly or suffering from serious ill health or long term disability.

TABLE 2. CATEGORIES OF IMPAIRMENT

<table>
<thead>
<tr>
<th>Main Categories</th>
<th>Estimated Number of Households</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visual impairment</td>
<td>1,468</td>
</tr>
<tr>
<td>Hearing impairment</td>
<td>2,150</td>
</tr>
<tr>
<td>Wheelchair user</td>
<td>1,077</td>
</tr>
<tr>
<td>Walking difficulty (not wheelchair user)</td>
<td>6,448</td>
</tr>
<tr>
<td>Learning difficulty</td>
<td>838</td>
</tr>
<tr>
<td>Mental ill health</td>
<td>760</td>
</tr>
<tr>
<td>Hygiene facilities (dialysis user)</td>
<td>38</td>
</tr>
<tr>
<td>Other impairments</td>
<td>4,191</td>
</tr>
<tr>
<td>Total</td>
<td>16,969</td>
</tr>
</tbody>
</table>

1,781 of the households needing to move (1,484 existing and 297 emerging households) contained people with special needs.

4. THE COSTS FACING HOUSEHOLDS NEEDING TO MOVE IN THE CURRENT HOUSING MARKET

Analysis of the housing market is essential for the assessment of affordability. The link between local housing market costs and incomes (information derived from the household survey) helps to determine how many households can and cannot afford the housing they may need in the future.

The average price of a house in South Gloucestershire rose between 1998 (the date of the last Housing Needs Survey) and 2003 by 90.4%, an increase of £73,946 from £81,809 in the 2nd Quarter of 1998, a per annum increase of £14,789. Three year running average change in house prices has been around 12%.

At least 20 agents, covering a range of local and regional agents, supplied information about typical bottom of the range house sale prices for properties of different types and sizes in a reasonable state of repair.

TABLE 3. MINIMUM HOUSE SALE PRICES, APRIL-JUNE 2003.

<table>
<thead>
<tr>
<th>Dwelling size</th>
<th>Typical House Prices Urban areas</th>
<th>Typical House Prices Rural Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 bed flat</td>
<td>£82,000</td>
<td>£84,000</td>
</tr>
<tr>
<td>2 bed flat</td>
<td>£97,000</td>
<td>£111,000</td>
</tr>
<tr>
<td>2 bed house</td>
<td>£113,000</td>
<td>£115,330</td>
</tr>
<tr>
<td>3 bed house</td>
<td>£135,000</td>
<td>£148,330</td>
</tr>
<tr>
<td>4 bed house</td>
<td>£184,500</td>
<td>£217,670</td>
</tr>
</tbody>
</table>

Extracted from Table 3.3, page 77, South Gloucestershire Council, Housing Needs Survey, Final Report, 2004
Letting agents provided a sub-area breakdown of private rents. There were very few one and two bedroom terraces and very few bungalows. The average rent for a 2 bed flat was about £500 per month and a 2 bed house was about £530 a month.

Typical weekly social rents varied between RSLs and the Council but vary little by geographical area.

**TABLE 4. WEEKLY SOCIAL RENTS IN SOUTH GLOS, APRIL-JUNE 2003.**

<table>
<thead>
<tr>
<th>Property Types</th>
<th>Council</th>
<th>Registered Social Landlords</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 bed flat</td>
<td>£45.63</td>
<td>£53.31</td>
</tr>
<tr>
<td>2 bed flat</td>
<td>£48.74</td>
<td>£57.96</td>
</tr>
<tr>
<td>2 bed house</td>
<td>£56.82</td>
<td>£66.38</td>
</tr>
<tr>
<td>3 bed house</td>
<td>£61.26</td>
<td>£72.47</td>
</tr>
<tr>
<td>4 bed house</td>
<td>£64.90</td>
<td>£76.81</td>
</tr>
</tbody>
</table>

Extracted from Table 3.5, pages 80 and 81, South Gloucestershire Council, Housing Needs Survey Final Report, 2004.

The only shared ownership schemes at the time of the survey were in Little Stoke, Filton, Yate, Warmley and Hanham, mainly 3 bed properties with 50% equity share available. The only flats available were in Warmley.

The minimum rental cost of for a one bed shared ownership property in Warmley with a 50% equity share on a property valued at £75,000 was £344 a month.

5. AFFORDABILITY AT THE TIME OF THE SURVEY

The research analysed whether households in inadequate housing could afford to move into the tenures they expected to need i.e. could they pay current housing costs (minimum house prices and rents). Household incomes were compared to the entry income thresholds required to ascertain the affordability of housing.

Ability to pay a minimum deposit of 5% of purchase price is still required by most lenders, and the standard multiple usually applied among lenders in South Gloucestershire is 3 - 3.5 times the gross annual household income for a single earner, with a reduced multiplier for dual earner households of 2.5 - 2.75 times reflecting their higher earning potential.

For those looking to rent and not dependent upon Housing Benefit, a household should be able to afford to rent if paying less than 25% of their net income in rent (30% in the case of private renting). This is the National Housing Federation's guideline on what is an affordable rent level, which is also used by the Housing Corporation.

The survey revealed a considerable affordability problem for potential movers, arising from the relationship between their incomes and local housing market.

**Low incomes of potential movers**

86% of existing household movers and 63% of emerging households supplied income information.

- The average annual gross income of all existing household movers was £14,537.
- The average annual gross income of all emerging mover households was only £13,221.
Housing needs

An estimated 4,169 households were unlikely to have their needs met in the market existing in 2003 (73% of existing households and 92% of the emerging household movers used for assessing affordability were unable to afford to buy or rent).

2,760 households were unable to afford to buy or rent in the urban sub-areas and 1,409 households in the rural sub-areas.

Registered Housing Needs

JHA calculated how many households in need already on a Housing Register could afford to buy or rent in the current market. 1,202 of the 4,169 or 28.8%, were unable to buy or rent in the market, indicating that if the Housing Register alone is used for measuring housing need, it considerably understates the true extent of housing need across South Gloucestershire.

Other factors

Account was taken of those emerging households who could afford to buy or rent if they shared with someone else, and this number has been discounted from the identified level of backlog need.

Similarly, households living in temporary accommodation and not picked up by the survey, were added to the total in housing need.

6. FORECASTING HOUSING NEEDS

The affordability assessment demonstrated that 92% of emerging households were unable to afford access to the housing market in 2001.

JHA undertook some ‘scenario – building’ to provide the Council with a realistic assessment of how that proportion might change over the remainder of the Plan period.

Under an ‘Unfavourable Scenario’, house prices continue rising from the position reached in 2003 while incomes grow more slowly in relation to real housing costs.

Under a ‘Favourable Scenario’ affordability increases over the period to 2011 associated with rising incomes and falling real house prices.

Taking into account available supply, South Gloucestershire should plan for a minimum of 970 affordable dwellings under a ‘favourable’ scenario and a maximum of 1,270 affordable dwellings under an ‘unfavourable scenario.’

This is a range of shortfall in the average supply of affordable homes of between 121 and 159 units per annum, over the period to 2011, figures which are sensitive to differing economic and market conditions.
7. AFFORDABLE DWELLING MIX

Having identified which households were currently in need of new affordable dwellings, JHA analysed the breakdown of backlog need by location within the district, and by the size/type of accommodation needed.

The Council and RSLs in South Gloucestershire provided information about the pattern of their lettings over the last three years with respect to the types and sizes of provision that had been made, and this was used to compare with the situation revealed by the HN Survey.

The exercise revealed an over-supply of sheltered accommodation and 2 bed flats and a shortage of smaller and larger houses.

Tenure Mix

The affordability assessment of households unsuitably housed, based upon market costs at the time of the survey in 2003, indicated that 95.5% of affordable provision should be in the social rented sector with only 4.5% in shared ownership. To consider what tenure mix would be appropriate over the plan period 2003/4 to 2010/11, it was also important to take into account different types of housing options which the market might be prepared to deliver in the future.

The Council asked JHA to test a number of options relating to intermediate renting, discounted sale housing (low cost market), and lower cost shared ownership, to investigate whether these could meet some of the need so reducing the need for social rented housing.

The appropriate mix of new affordable dwelling provision required to clear backlog need and emerging need, based on incomes at the time of the survey is shown in Table 5 below. It shows that:

- 11.5% of backlog and emerging households could meet their housing needs if 75% of market rent option was made available.
- 8.7% of backlog and emerging households could afford homeownership aspirations assuming shared ownership was provided at 40% of market value with no more than a 1% residual rent being levied.
- 2.4% of backlog and emerging households could afford sale housing assuming it was available at a discount of 30% on market prices.

TABLE 5. POSSIBLE TENURE MIX BASED UPON SOME HOUSING OPTIONS NOT CURRENTLY AVAILABLE.

<table>
<thead>
<tr>
<th>Tenure Mix</th>
<th>Options tested on backlog need</th>
<th>Options tested on backlog and emerging need</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Renting</td>
<td>82.5%</td>
<td>77.4%</td>
</tr>
<tr>
<td>Sub-Market Renting at 75% OMR</td>
<td>4.0%</td>
<td>11.5%</td>
</tr>
<tr>
<td>LCHO at no greater than 40% of OMV</td>
<td>11.7%</td>
<td>8.7%</td>
</tr>
<tr>
<td>Discounted Sale</td>
<td>1.8%</td>
<td>2.4%</td>
</tr>
</tbody>
</table>

Annual monitoring of incomes and house values should be carried out to keep provision in line with need and to reappraise the ability of incomes to keep up with the cost of purchase and rent, or vice versa if incomes rise faster than prices.
9. THE STRATEGIC IMPLICATIONS OF THE RESEARCH FINDINGS

The information from the Housing Needs Survey 2003 helps the Council to plan more effectively for future housing provision. The survey provides a considerable range of information about household needs and aspirations – and provides an assessment in depth of the policy implications of the research undertaken (Section 7 of the full report).

The Local Plan

The Council will need to consider the following factors when translating needs assessments into Local Plan policies and targets:

a) The level of land release in the Local Plan, disaggregated to urban and rural sub-areas of the District - the main opportunity for delivery of affordable housing on allocated and windfall sites without planning permission;

b) The mix of sites available in terms of size, location and general suitability for housing;

c) The preferred thresholds on which affordable housing is to be negotiated since this will influence the size and mix of sites available or ‘eligible’ on which to determine targets;

d) The funding likely to be available for social housing in the future.

Current Council policy is that 30% of all housing permissions should be affordable. Based upon the leeway of 5,317 dwellings available at the time of the survey, the maximum delivery of Subsidised Affordable Housing achievable on a target of 30% on each eligible site (i.e. taking into account the economics of provision and the need to build viable and sustainable communities) would be 1,595 dwellings or 199 dwellings per annum, well below the identified need.

JHA recommend that, in the light of the scale of housing need identified in the 2003 Housing Needs Survey and the restricted land supply position, the Council test the viability of raising the target for affordable housing to 40% or 50% of all new housing permissions within the thresholds, defined by social rented, intermediate rented and shared equity (low cost home ownership).

JHA advise the Council to reduce their present thresholds in the light of the increase in housing need which has occurred since the last Housing Needs Survey in 1998.

The greatest gap between Local Plan provision and housing need occurs in the rural sub-areas where there are only limited or no identified opportunities.

To achieve any increase in affordable housing provision in rural areas, reliance must be placed on small sites, whenever these arise, as well as ‘exception sites’ when these become available.
Appendix 4

Development Standards

The Council’s Development Standards will comply with national guidance and policies, which may be updated from time to time. The development standard for affordable housing currently required is set out below:

• **Design and Quality Standard.** The Housing Corporation’s standard for affordable housing will be sought on all affordable housing, whether delivered with or without public subsidy. The standard is based on Housing Quality Indicators (HQI) and each house type will be expected to achieve the relevant minimum HQI score. Housing Corporation standards may be subject to change over time so the standards sought will be those current at the time of development.

• **Code for Sustainable Homes.** Level 3 will be sought on all new affordable housing. The Code is contained within the Design and Quality Standard.

• **Lifetime Homes.** The Joseph Rowntree Foundation Lifetime Homes standard will be expected on all new affordable housing. This is a Government objective to be achieved on all new affordable housing by 2011 as set out in the CLG strategy ‘Lifetime Homes, Lifetime Neighbourhoods: A national Strategy for Housing in an Ageing Society’ (Feb 2008).

• **Wheelchair standard.** A proportion of wheelchair accessible dwellings to meet identified need, will be sought on sites which the Council’s Occupational Therapist assesses as suitable for wheelchair users. The wheelchair standard is set out below.

• **Secured by Design.** The Police Architectural Liaison Officer will be consulted on all residential planning applications, to assess whether the scheme complies with the Secured by Design standard and, if not, how the standard can be achieved. All affordable housing schemes will be expected to achieve the standard, if possible.

• **Fixtures and Fittings.** A minimum provision of fixtures and fittings will be expected in all new affordable housing to ensure a consistent standard across the District.

• **Unit sizes.** The minimum sizes contained in the table below will ensure that the affordable housing units comply with the Housing Corporation’s Design and Quality Standard and meet the Council’s Development Standards as above. *Size refers to internal area, wall finish to wall finish. For flats, the central lobby area and passages are excluded (Housing Corporation HQI Calculator version 4).*
<table>
<thead>
<tr>
<th>Dwelling type</th>
<th>Minimum Sq.m.*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 bed 2 person flat</td>
<td>46</td>
</tr>
<tr>
<td>2 bed 3 person flat</td>
<td>62</td>
</tr>
<tr>
<td>2 bed 4 person flat</td>
<td>67</td>
</tr>
<tr>
<td>2 bed 4 person house</td>
<td>75</td>
</tr>
<tr>
<td>3 bed 5 person house</td>
<td>85</td>
</tr>
<tr>
<td>3 bed 6 person house (2 storey)</td>
<td>95</td>
</tr>
<tr>
<td>4 bed 6 person house (2 storey)</td>
<td>100</td>
</tr>
<tr>
<td>3 bed 6 person house (3 storey)</td>
<td>100</td>
</tr>
<tr>
<td>4 bed 6 person house (3 storey)</td>
<td>105</td>
</tr>
<tr>
<td>4 bed 7 person house (2 storey)</td>
<td>108</td>
</tr>
<tr>
<td>4 bed 7 person house (3 storey)</td>
<td>115</td>
</tr>
<tr>
<td>Anything larger</td>
<td>115 + 10m² per person/bedspace</td>
</tr>
</tbody>
</table>
Wheelchair standard

The Housing Corporation’s standards for wheelchair user housing, as set out in the Design and Quality Standards, will be the minimum standard expected by the Council. The term ‘wheelchair-user housing’ is used to describe self-contained accommodation designed for independent living by disabled people and wheelchair users.

The Sustainability and External Environment elements of the core standards for new-build general needs, as set out in Section 1 of the Design and Quality Standards, apply as minimum requirements.

The Internal Environment performance standard of the core standards sets out the outcome to be achieved but the core standard performance measures are insufficient for two of the three specified Housing Quality Indicator aspects, namely unit size and unit layout.

These two aspects need to achieve significantly higher performance levels than the specified HQI minima to ensure that the accommodation provided is capable of sensibly accommodating the necessary furniture and equipment associated with specific room activities and suitable for the particular needs of wheelchair users.

Additional Standards
The higher performance levels referred to above will be satisfied by full compliance with the requirements set out in the following publication:

Appendix 5

HOUSING MANAGEMENT STANDARDS

INTRODUCTION

1. Two formal Housing Partnerships operate in South Gloucestershire, HomesWest to deliver affordable housing across the West of England and South Gloucestershire Housing Partnership (SGHP) to deliver small affordable housing schemes and to receive new homes developed by HomesWest partners. In view of the primary role of SGHP partners they were selected on the basis of their expertise and good practice in housing management.

2. All housing associations with stock in South Gloucestershire are members of the Social Landlords Partnership, a network meeting bimonthly to share best practice and work together to ensure social residents in South Gloucestershire get an excellent service from their landlords. At the meeting in April 2007 the Partnership agreed to develop a set of housing management standards that would describe the standard that all members would aspire to and that SGHP members would meet.

3. The standards are derived from the relevant Audit Commission Key Lines of Enquiry at a level that we believe represents a landlord that is providing a good service and striving for excellence. In line with our terms of reference we will benchmark our performance against these standards and identify and share good practice that may benefit us and our residents.

4. The standards are set out under the key housing management issues agreed by the Partnership:
   - Housing income management
   - Estate Management
   - Tenancy management
   - Void Property Management & Lettings
   - Resident Involvement
   - Maintenance
HOUSING MANAGEMENT STANDARDS

HOUSING INCOME MANAGEMENT

Target: Average current arrears as a proportion of rent roll – 5% maximum

These service standards relate to rent and all sundry income collection. Partners will:

1. Offer a range of flexible payment options (i.e. direct debit, Post Offices, local shops, the internet)
2. Be accessible to residents and have challenging service standards regarding response to enquiries, which are published and agreed
3. Carry out a benefit assessment for new residents and assist them with all aspects of claiming Housing Benefit throughout their tenancy.
4. Have an effective liaison partnership with Housing Benefit and other agencies (such as CAB).
5. Provide quarterly rent statements in a user friendly format
6. Provide information in a range of formats (e.g. Braille, translations)
7. Provide clear information about the way rents and service charges are set
8. Take early action to prevent debt increasing
9. Use a variety of means to assist the resident including customer friendly letters and home visits where appropriate
10. Offer debt counselling or refer to support/ debt agencies where appropriate
11. Seek possession on rent arrears only as a last resort once all other reasonable steps have been taken and comply with the Housing Corporation Circular and Court Protocol
12. Monitor performance on rent collection set challenging targets for improvement.

ESTATE MANAGEMENT

Targets: Response to serious incidents within 24 hours – 100%
Response to other incidents within 5 days – 100%
Planned inspections of estates carried out within timescale – 100%
Response to letters from customers in 10 days – 100%

These standards relate to all general estate management issues and anti-social behaviour. Partners will:
1. Employ Housing Managers who are able to spend a good proportion of time ‘on the patch’ with customers routinely visiting estates and seeing customers in their own homes upon request.

2. Carry out routine inspections of estates with customers and monitor contractors maintaining estates.

3. Ensure that any gardening and cleaning services provided are carefully monitored, are of a consistently good standard and that customers receive value for money.

4. Ensure staff develop excellent network links, and work in partnership with, other agencies operating in the locality – for example, the police, LA colleagues, CAB, benefit advisors, credit unions and other RSL partners.

5. Use community links to benefit their residents by supporting local gardening competitions, youth activities, fun days etc.

6. Consult widely with their residents on all levels and directly use customer feedback to improve service delivery, for example, by targeting site improvement budgets according to tenant requirements.

7. Employ a culture of using persuasion and the personal touch rather than 'enforcement' and see eviction as an ultimate failure.

8. Have robust processes in place to deal with all aspects of tenancy management, for example, dealing with anti social behaviour, abandonments and untaxed cars.

9. Provide robust support to victims of anti social behaviour, hate crime or domestic violence via witness support programs, out of hours support lines, installing additional security measures or securing the provision of alternative accommodation.

10. Consider and use a wide range of remedies to resolve tenancy disputes and anti social behaviour using legal action as a last resort – for example, by the promotion of mediation services and ABC’s and sponsoring summer activity programs to keep children occupied.

11. Promote care for the environment through environmental improvements, recycling schemes and other initiatives.

**TENANCY MANAGEMENT**

**Target:** Annual tenancy failures – 0.5% of all tenancies or less.

Partners will:

1. **Recognise and embrace diversity through:**
   - Ensuring easy access to information in appropriate formats
   - Training staff in equality and diversity
   - Ensuring all publicly accessible offices and meeting places are DDA compliant
   - Providing interpretation services

2. **Ensure residents have access to appropriate support through:**
   - Working proactively with other agencies to ensure needs are met
   - Obtaining consent from residents to refer for support services
   - Ensuring timely intervention
   - Identifying needs at an early stage

3. **Make it easy for residents to make contact with their landlord by:**
• Clearly publicising all means of contact including internet, phones, and email
• Providing clear reporting lines
• Maintaining a culture of openness and confidentiality and observing data protection rules
• Providing ways for residents to give feedback

4. **Promote the Respect agenda through:**
   - Sharing good practice with other landlords and agencies and having clear guidelines which are well publicised
   - Utilising a wide range of tools to address ASB
   - Working proactively with other agencies
   - Maintaining good case management and feedback
   - Setting clear agreements and guidelines
   - Monitoring

5. **Promote a culture of sustainable and settled communities to minimise turnover.**

**VOID PROPERTY MANAGEMENT AND LETTINGS**

**Targets:**
- Average period to relet void properties – 28 days maximum
- Nominations on relets to applicants on SGC waiting list – 75% minimum

Partners will:
1) Provide good quality information on access to housing appropriate to customers’ needs by sharing information and partnership working.
2) Ensure empty properties are available to let as quickly as possible; minimising waiting times, keeping rents affordable and allowing customers greater choice in where they live.
3) Let our homes in a fair and transparent manner, promoting sustainable communities and good practice in relation to culture and diversity.
4) Provide residents with full details of the property and neighbourhood and all residents will have the opportunity to view the property before the tenancy start date.
5) Publicise a relet standard to residents and prospective residents.
6) Strive to meet the decent homes standard and will always ensure properties are clean, in good repair, safe and secure by the tenancy start date.
7) Ensure the turnaround time between tenancies is as short as possible.
8) Be aware of any changes in government legislation and good practice in relation to letting our homes and will develop our standards accordingly.

**RESIDENT INVOLVEMENT**

**Targets:**
- Residents informed, consulted and involved in decisions affecting services – 100% of decisions.
- Regular tenant newsletters provided to all residents – 100%
Partners will:
1. Have in place a resident involvement compact or statement which is up to date and relevant.
2. Provide a range of ways for service users to contact them
3. Have funding and staff in place to make effective resident involvement happen.
4. Provide regular newsletters which are up to date, user focused and presented in innovative ways to promote interest.
5. Have a range of mechanisms in place that allow service users to participate effectively, in a way and at a level that best suits them.
6. Are clear about the purposes of involving residents and can demonstrate service improvements as a result of resident involvement.

MAINTENANCE

Targets: Repairs carried out within publicised timescales:
- Emergency – 98% minimum
- Urgent – 95% minimum
- Routine – 95% minimum

Partners will:
1. Ensure good access to the service and user focus through:
   • Employing knowledgeable, customer focussed front line staff;
   • Providing easy ways to report repairs, including OOH provision;
   • Using IT systems to capture all relevant information;
   • Providing timescales to customers on repair completion times;
   • Using an appointment system where possible for inspections/repairs;
   • Having a clear recharge policy and procedure in place, well communicated to customers;
   • Having a clear procedure in place for customers who refuse access;
   • Having clear publicised service standards in place;
   • Consulting with customers on major decisions which affect service including stock investment, repair programmes and repair targets;
   • Employing a wide range of customer feedback methods to capture satisfaction and service improvement.
2. Ensure the service is equally accessible to all and recognises diversity by:
   • Maintaining good records and analysing information on ethnicity, vulnerability and disability;
   • Providing information on repairs in a comprehensive range of languages and formats;
3. Provide an excellent repairs service through:
   • Responding quickly to residents requests;
   • Giving high standards and “first fix” repair;
   • Regularly inspecting communal areas and involving residents with follow-up repairs in agreed timescales;
   • Clearly defining and communicating response times for repairs & categories for emergency, urgent & routine jobs.
4. Provide an excellent capital programme and planned works service by:
• Developing a programme of maintenance services designed to ensure all homes meet the Decent Homes Standard (DHS);
• Ensuring accurate information is maintained on compliance with DHS;
• Undertaking stock condition surveys;
• Having robust procedures in place for asbestos management;
• Having a clear Asset Management Strategy in place, linked to DHS and stock condition information;
• Developing service programmes for communal heating, play equipment, lifts etc in accordance with good practice and statutory requirements;
• Carrying out an annual gas safety check of all properties.
• Communicating effectively with residents.

5. Enable disabled customers to live independently by working closely with health and social services to promote and provide adaptations.

6. Ensure value for money in repairs and improvements through:
• Maintaining information on costs;
• Adopting partnering arrangements;
• Recycling aids and adaptations.
Appendix 6

Affordability criteria for intermediate housing

1. PPS3 and Delivering Affordable Housing

As set out in section 6, the Council uses the definitions of affordable housing set out in PPS3 Annex B and Delivering Affordable Housing Annex B, i.e.

‘Affordable housing includes social rented and intermediate housing provided to specified eligible households whose needs are not met by the market. Affordable housing should:

- meet the needs of eligible households including availability at a cost low enough for them to afford, determined with regard to local incomes and local house prices; and

- include provisions for:
  i) the home to be retained for future eligible households; or
  ii) if these restrictions are lifted, for any subsidy to be recycled for alternative affordable housing provision.

Intermediate affordable housing is housing at prices and rents above those of social rent but below market price or rents, and which meet the criteria set out above. These can include shared equity (eg Homebuy) and other low cost homes for sale and intermediate rent.’

2. SHMA Practice Guidance

The SHMA Practice Guidance states on page 57:

‘A household can be considered able to afford intermediate affordable housing when rental payments (on the landlord’s share) and mortgage payments (on the part they own) constitute up to 25% of gross household income.’

The Council’s interpretation of this is that any service charges payable are included in the housing costs that must be covered by the maximum figure of 25% of gross income. This position has been tested at Inquiry and confirmed as robust.

The SHMA Practice Guidance also sets out guidance how to assess whether a household can afford home ownership or market renting (see page 42):

‘A household can be considered able to afford to buy a home if it costs 3.5 times the gross household income for a single earner household or 2.9 times the gross household income for dual-income households.’

‘A household can be considered able to afford market house renting in cases where the rent payable was up to 25% of their gross household income. The ‘Rent Payable’ figure is defined as the entire rent due, even if it is partially or entirely met by Housing Benefit.’

The guidance also states that housing market partnerships will need to consider that what is affordable may vary, and that local circumstances could justify a figure other than 25% of gross household income being used. This will be considered by the West of England Strategic Housing Market Assessment Partnership as part of the SHMA (planned to be in place by summer 2008), and until this is available, the guideline figure of 25% will be applied.
3. Affordability in South Gloucestershire

Affordable housing provided through planning policy

In order to comply with PPS3, intermediate affordable housing must cost less than threshold market housing, either for sale or rent, in the local area. Currently the cost of market rents sets the threshold, but circumstances could change should market rents rise or market values drop.

In order to establish whether an intermediate housing product provided through planning policy is affordable, it is currently necessary to identify the cost of renting an equivalent sized property in the private market in the locality and compare this with the cost of the intermediate housing product, both on the basis of spending no more than 25% of gross income.

The cost of the market rent option would establish the upper threshold of affordability for the intermediate housing product.

For example, if a two-bed flat with an open market value of £148,000 costs £500 per month to rent, the cost of buying the same property on a shared ownership basis (i.e. including mortgage, rent on the unsold equity and service charges) must cost less than £500 per month.

The Council considers that very few people in housing need would be able to afford intermediate affordable housing priced at or just below the cost of market renting, and that there should be a clear margin between the cost of private renting and intermediate affordable housing if it is to be genuinely affordable.

The Council will seek intermediate affordable housing to meet a range of identified need and will assess and review the affordability of all intermediate affordable housing offered and subsequently delivered.

On major sites the Council will seek intermediate affordable housing that is affordable to a range of people in housing need, not just those at the top end of the intermediate market to ensure that intermediate affordable housing options are available for the full range of households that can potentially afford intermediate affordable housing.

To achieve this, the Council will seek to negotiate a range of options to be offered to initial purchasers. For example this could include options to buy equity shares of 30%, 35% and 40%, all with rent on the unsold equity at a maximum of 1%.

As at October 2007, the guideline maximum affordability threshold is equity shares of 40% and rent on the unsold equity of 1%.

Service charges: the Council will consider the level of management and other charges that occupiers will be expected to pay. The Council will take service charges into account when assessing affordability and will seek to limit service charges to maintain affordability.

4. Intermediate affordable housing provided by developers or other non-RSLs

If developers or other non-RSLs wish to sell intermediate home ownership products without involving an RSL they must achieve the same affordability criteria.
Appendix 7

Recycling of capital receipts

Part of the definition of affordable housing found in PPS3 Annex B and Delivering Affordable Housing Annex B is that it should: ‘Include provision for the home to remain at an affordable price for future eligible households or, if these restrictions are lifted, for the subsidy to be recycled for alternative affordable housing provision.

The proposed mechanism for this is as follows:

DEFINITIONS

“Actual Market Value” means the market value of an Affordable Dwelling assessed in accordance with the provisions of the Housing Corporation’s Shared Ownership Lease in a Staircasing Event.

“Additional Affordable Housing” means any new, replacement or additional Affordable Housing provided within the Council area in a scheme that shall first have been agreed in writing (unless the Affordable Housing Provider is an Approved RSL in which case a scheme shall need only be the subject of consultation with the Director of Community Care and Housing) with the Director of Community Care and Housing (such agreement not be unreasonably withheld or delayed) to meet the housing need at the time of the provision which for the avoidance of doubt excludes any Affordable Housing provided pursuant to this Agreement or any other Affordable Housing brought forward as part of the Council’s prevailing adopted development plan Affordable Housing requirement in pursuance of Section 106 of the 1990 Planning Act or subsequent legislation.

“Affordable Dwelling” means an individual unit of Affordable Housing identified as such in accordance with this Schedule.


“Affordable Housing Manager” means an affordable housing management organisation accredited for such purposes via the Housing Management Accreditation Scheme dated March 2006 (or subsequent scheme) by the Housing Corporation.

“Affordable Housing Provider” means:

- a housing association as defined in the Housing Associations Act 1985; or
- a social landlord as defined in Section 2 of the Housing Act 1996; or
- an accredited partner of the Housing Corporation for the provision of Affordable Housing;

who shall be required to enter into an agreement with an Affordable Housing Manager where not an accredited Affordable Housing Manager for the management of the Affordable Dwellings.

“Dwelling” shall mean any unit of self-contained residential accommodation constructed pursuant to the Planning Permission.

“On costs” means any costs incurred by an Affordable Housing Provider and Affordable Housing Manager in relation to any transaction regarding Staircasing Receipts as described in sub-paragraph 2.5 of Schedule 5 of the Housing Corporation Shared Ownership Lease which are not to be reimbursed by any other person.

“Market Dwelling” means any dwelling other than an Affordable Dwelling.
“Market Value” means (in relation to the initial calculation of the Subsidy only) the market value as assessed by a Valuer of a Dwelling as confirmed to the Council by the relevant Affordable Housing Provider (such value being calculated in accordance with the RICS Appraisal and Valuation Standards (5th Edition)) and being the estimated amount for which in the absence of this Agreement residential units of equivalent location specification size state of repair and condition and which are not restricted to use as affordable housing should exchange on the date of valuation between a willing buyer and a willing seller in an arm’s-length transaction after proper marketing wherein the parties had each acted knowledgeably prudently and without compulsion and on the following assumptions:-

(a) no discount is to be allowed for bulk sales or on the basis that more than one property is being sold to the same purchaser;
(b) it is sold with vacant possession and with good and marketable title;
(c) the title is free from encumbrances;
(d) the valuation is for the unrestricted freehold or as appropriate leasehold (of an initial minimum 99 year term) with vacant possession which, for the avoidance of doubt, ignores any use as Affordable Housing;
(e) that the property is newly built, decorated, full equipped for sale and serviced and fit for immediate occupation;
(f) that the valuation is for sale of an individual unit and not part of a larger sale;
(g) all roads footpaths landscaping and open space have been laid out and completed and all other Individual Units have been built, sold and occupied;
(h) assuming the Application Land is free from contamination;

“Shared Ownership Lease” means a lease or sub lease under which an Affordable Dwelling may be disposed of under which that unit shall be disposed of by way of shared ownership or shared equity sale and/or lease (including New Build HomeBuy) granted at a premium to be paid by the tenant or sub tenant upon completion or raised by way of mortgage or charge and under which the provisions of the lease or sub lease enable the tenant or sub tenant to acquire the balance of the legal or equitable interest in the relevant Dwelling AND whereby the initial purchaser or lessee acquires an initial share of up to and including 40% of the equity in that unit at the equivalent percentage of the full market value of that Dwelling at the time of its initial disposal by Shared Ownership Lease and the annual rental element of the shared ownership / Shared Ownership Lease shall be up to and including 1% of the market value of the unsold equity as at the grant of the lease (with any increases in rent being index linked to the increase (if any) in the RPI as per the Housing Corporation model form of shared ownership lease

“Staircasing Event” means any occasion on which a shared ownership lessee acquires additional equity in a Dwelling pursuant to a Shared Ownership Lease or tenant of a Social Rented Affordable Housing Unit acquires a share or the whole equity in their property under any current or future legislation that applies to non publicly funded Affordable Housing granting tenants the right to acquire the property or where the property is sold for any other reason

“Staircasing Receipts” means payments made to the Affordable Housing Provider (less On Costs) as a result of a Staircasing Event by a shared ownership lessee tenant or any other person for the acquisition of equity in a Dwelling pursuant to a Staircasing Event

“Subsidy” means the amount expressed in pounds of the difference between;
a) the price (including land) attributable to the disposal of Affordable Dwelling to an Affordable Housing Provider (being for the avoidance of doubt the price to be received from the Affordable Housing Provider pursuant to an Affordable Housing Contract by an Owner or Developer pursuant to an Affordable Housing Contract in respect of the disposal of that Dwelling being the price (including land) as agreed between the Owner or Developer as at the date of exchange of contracts of the Affordable Housing Contract and notified to the Council in writing) and the relevant Affordable Housing Provider; and

b) the Market Value attributable to that Affordable Dwelling (including land) as at the date of exchange of contracts for the sale and purchase of that Affordable Dwelling to an Affordable Housing Provider as agreed between the relevant owner and the relevant Affordable Housing Provider pursuant to an Affordable Housing Contract to whom the Affordable Dwelling is to be disposed assuming it to have been completed and ready for residential occupation as at that date and notified to the Council in writing (such Market Valuation to have been certified by a Valuer)

“Valuer” shall mean a Member or Fellow or the Royal Institution of Chartered Surveyors being a chartered valuation surveyor of at least 10 years post qualification experience and appointed by the Affordable Housing Provider and acting in an independent capacity

Application Of Staircasing Receipts

On the occurrence of any Staircasing Event relating to an Affordable Dwelling and subject always to the application of paragraphs (b) (c) and (d) below the Affordable Housing Provider (as successor in title to the Owners and Developers) shall (having first deducted an amount equal to X% of the initial outstanding net loan debt attributable to that Affordable Dwelling at the point of first disposal as assessed by the Affordable Housing Provider) (where X equals the additional proportion of the equity in the Affordable Dwelling acquired as a percentage of the unsold equity immediately prior to the Staircasing Event) reserve and set aside the remaining balance of any Staircasing Receipts received in relation to that Affordable Dwelling for the provision of Additional Affordable Housing until an aggregate amount equal to the Subsidy relating to that Affordable Dwelling (as notionally recalculated and carried forward from time to time under paragraph (c) (i) below) shall have been reserved and set aside for such purposes.

The provisions of paragraph (a) above shall not apply where there is a statutory or regulatory requirement to account for Staircasing Receipts to any other body;

On the occasion of the first and any subsequent Staircasing Event the Subsidy shall be notionally recalculated (but only for the purposes of identifying the amount of any Staircasing Receipt to be reserved and set aside for the provision of Additional Affordable Housing) as follows:-

(i) On the date of the first Staircasing Event the notional Subsidy shall be notionally increased by the percentage increase (if any) in the Market Value of the relevant Affordable Dwelling from the date as originally notified to the Council by comparing the Market Value so notified by the Affordable Housing Provider at the point of calculating the Subsidy with its Actual Market Value as notified to the Council by the Affordable Housing Provider at the date of the Staircasing Event

AND for the avoidance of doubt the Subsidy as notionally increased under this Sub-Paragraph (i) shall be the result of the following calculation in respect of any relevant Affordable Dwelling.

\[ \frac{AMV \times S}{MV} \]

Where:
AMV equals the Actual Market Value of the Affordable Dwelling at the date of the first Staircasing Event.
MV equals the Market Value of the Affordable Dwelling as originally notified to the Council at the point of calculating the Subsidy.

S equals the Subsidy attributed to that Affordable Dwelling as originally notified to the Council at the point of calculating the Subsidy.

(ii) The Subsidy (as notionally increased) shall then be notionally reduced by the amount of any Staircasing Receipts and the balance carried forward.

(iii) On the date of any subsequent Staircasing Event relating to an Affordable Dwelling the Subsidy balance carried forward under (ii) above shall be notionally increased by the percentage increase in the Actual Market Value of the relevant Dwelling from the date of the previous Staircasing Event in (i) and its Actual Market Value as notified to the Council by the Affordable Housing Provider at the date of the subsequent Staircasing Event and the provisions of paras (a) to (c)(ii) shall be applied (mutatis mutandis) to such balances and any remaining notional Subsidy balance carried forward.

(d) Once:

(i) an amount equal to the notional Subsidy as re calculated and carried forward from time to time in accordance with paragraph (c) above shall have been set aside for the provision of Additional Affordable Housing as set out on (a) above; or

(ii) the final Staircasing Event (leaving the Shared Ownership Lease lessee or Tenant purchaser owning a 100% freehold or leasehold share) has occurred and the Subsidy is recalculated in accordance with the provisions above in (a) and (c) if the final Subsidy balance as recalculated in accordance with Sub-Paragraphs (c) (i) to (c) (iii) is greater than the balance of the Staircasing Receipt to be used reserved and set aside for Additional Affordable Housing identified in a) there will be no requirement to carry forward the Subsidy balances following this final Staircasing Event.

Then in either such case this paragraph shall be deemed satisfied and there shall be no requirement to reserve and set aside any further Staircasing Receipts (or part thereof) under paragraph (a) and (c) above.

e) the Owners shall procure that:

all Staircasing Receipts are paid into an interest bearing account (including any interest accrued thereon) and shall procure an annual audited account to the Council demonstrating details of all receipts from the sale of any interest in Affordable Housing (including the dates upon which the Staircasing Receipts were received);

a record of all Staircasing Receipts are kept;

that record is made available to the Council on demand;

any Staircasing Receipts (including accrued interest) shall only be used for the provision of Additional Affordable Housing; and

the Affordable Housing Provider and Affordable Housing Manager shall use reasonable endeavours to ensure the Staircasing Receipts are committed on the provision of Additional Affordable Housing within 3 years and spend within 5 years unless otherwise agreed in writing with the Council. In the event of any dispute then Independent Arbitration will be entered into by both parties.
Appendix 8

8.1. Calculation of financial contributions for off-site contributions

Where the Council agrees that an off-site financial contribution is appropriate, the applicant will be asked to propose a sum for consideration by the Council, which is broadly equivalent in scale to what would have been provided on-site and is based on the actual costs and values of the application site.

For the site in question, the Council will expect the applicant to calculate the sum based on the following factors:

1. 33.3% of permitted dwellings to be affordable
2. Tenure split of 77% social rent; 23% intermediate
3. Unit mix and sizes of dwelling types equivalent to what would have been expected under Policy H6 on the application site.
4. All affordable units to be to Housing Corporation Design and Quality standard, including Level 3 Code for Sustainable Homes.
5. Social rented units to be let at no more than Housing Corporation Target Rents
6. Intermediate housing to be New Build Homebuy (NBHB) sold to initial purchasers at no more than 40% of market value with an annual rent of no more than 1% of the unsold equity, inflated annually by RPI according to the standard Housing Corporation lease. If these terms are not demonstrably affordable, as defined by PPS3, to those in housing need, appropriate initial share price and residual rent will be required, which may be less than 40% and 1%. The market value of the intermediate units must be fully validated with supporting comparable evidence.
7. The value of clean unencumbered site suitable for providing an equivalent amount of affordable housing, assuming no allowance to be made for any S106 contributions, including an affordable housing contribution.
8. The build cost of comparable units
9. On-costs, to include professional fees, planning and building regulation fees, etc.
10. The price paid by an RSL for comparable units

To summarise, the off-site contribution is equal to the cost of acquiring the land plus the cost of constructing the units, including all associated costs, minus the sum that an RSL would pay for the units in question, i.e.

\[
\text{Land cost} + \text{total construction costs} - \text{price paid by RSL} = \text{off-site contribution}
\]

The Council may require land and construction costs to be supported by evidence of actual or comparative costs.

It will be a requirement of the Section 106 agreement that the off-site contribution is payable to the Council no later than the start of the development.

8.2. Supportable deficit (indicative purchase price)

In order to provide guidance on the price that developers might expect for the social rented units, the Council has consulted its RSL partners to find the average sum that could be supported by the target rent for a given dwelling type, sometimes referred to as the “supportable deficit”. The Council holds and can provide information on indicative purchase prices for various dwelling types. These figures will be updated annually, using current market data wherever possible, to reflect the current economic situation.

The table below gives indicative figures for 2007/08. Please apply to the Council for updated figures.
### SGC supportable deficit sums 2007/08

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<th>Minimum Area</th>
<th>Supportable Deficit (£)</th>
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<td>area B</td>
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<td>area C</td>
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### Areas

- **area A**: BS10, BS15, BS16, BS30, BS34, BS35, BS37, SN14
- **area B**: BS7, BS31, BS32, BS36
- **area C**: BA1, GL9, GL12, GL13
Appendix 9

South Gloucestershire urban and rural areas

The settlements below are designated urban or rural according to the South Gloucestershire Local Plan Proposals Map.

Urban

The urban areas to which policy H6 applies are:

Yate and Chipping Sodbury, Thornbury Filton Patchway Stoke Gifford Little Stoke Bradley Stoke Kingswood Hanham Staple Hill Downend Mangotsfield

Rural

Charfield, Coalpit Heath, Cromhall, Engine Common, Falfield, Frampton Cotterell, Hawkesbury Upton, Horton, Marshfield, Pilning, Pucklechurch, Rangeworthy, Severn Beach, Tormarton, Wickwar and Winterbourne.

Settlements washed over by the Green Belt to which the policy applies are Almondsbury, Alveston, Aust, Doynton, Dyrham, Easter Compton, Hallen, Hambrook, Hinton, Iron Acton, Olveston, Redwick, Rudgeway, Tockington, Westerleigh and Wick.

The policy also applies to the villages of Oldbury-on-Severn, Old Sodbury and Tytherington, where the village development boundary encompasses land within and outside the Green Belt.
Appendix 10

Useful contacts

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South Gloucestershire Council preferred partner Registered Social Landlords

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Fax: 01380 735400
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E-mail: simon.parks@sovereign.org.uk
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South Gloucestershire Housing Partnership

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Knightstone Housing Association
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Sovereign Housing Association
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Western Challenge Housing Association
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Web: www.sinakergroup.co.uk

United Housing Association
174 Cheltenham Road
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HomeBuy agents

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Web: www.homebuy-southwest.co.uk

Police architectural liaison officer

Police Community Safety Department
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BS34 8SR
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