Foreword

This Supplementary Planning Document has been prepared by Basingstoke and Deane Borough Council in its role as Local Planning Authority to support the delivery of the Basingstoke and Deane Local Plan 2011-29. It has been informed by extensive consultation including a six week formal consultation with residents and other stakeholders.

It has been prepared in accordance with The Town and Country Planning (Local Planning) (England) Regulations 2012 and is a material consideration in the determination of planning applications.
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1. Introduction

1.1 This Supplementary Planning Document (SPD) has been produced to expand upon the housing and affordable housing policies set out in the Basingstoke and Deane Borough Local Plan (2011-2029). It addresses the principles and processes that will ensure the delivery of a range of market and affordable housing to meet local need and demand; and to ensure that future residential development contributes to mixed sustainable communities and a balanced housing market.

1.2 The Council Plan 2016-20 identifies the council’s priorities over the coming years as: preparing for controlled and sustainable growth; improving residents’ quality of life; and supporting those who need it. In particular, it identifies a specific objective to ‘support the provision of quality homes affordable to all through growth and regeneration’. A suitable housing stock can help to deliver on all these aims.

1.3 The council adopted the Housing and Homelessness Strategy 2016-20 in 2016 which identifies five key priority areas to deliver the Council Plan. The SPD supports delivery of the following priority areas:

- Maximising supply (of new homes);
- Shaping supply (of new homes including affordable tenures); and
- More housing choice (for residents who wish to access home ownership; older residents who wish to move to accommodation more suitable for their needs; and other residents requiring suitable accommodation for their needs).

1.4 Over the plan period, the population is expected to grow from by more than 32,000 people and 21,300 net new households are expected to form. To accommodate this population growth, the Basingstoke and Deane Local Plan 2011-2029 plans to provide 850 dwellings per annum, principally focused upon the expansion of the borough’s towns and villages, and particularly Basingstoke. The population will have a range of housing needs, and a range of homes of different, size, type and tenure will be required.

1.5 This document therefore comprises a number of individual chapters relating to:

* Chapter 2: Affordable housing
* Chapter 3: Housing mix for market housing
* Chapter 4: Housing for older people and those in need of care
* Chapter 5: Self-build and custom housebuilding

1.6 This SPD has been prepared in accordance with the Local Plan Regulations. The SPD cannot and does not propose new policy; rather it explains how the policies in the Local Plan will be used. It will be a material consideration in the determination of planning applications.
1.1. Planning policy background

1.1.1. National policy

1.7 The National Planning Policy Framework (2012, NPPF) sets out that the planning system should contribute to sustainable development through the delivery of a wide choice of high quality homes. NPPF para 50 sets out that local planning authorities should widen opportunities for home ownership and create sustainable, inclusive and mixed communities. To do this, they should:

- ‘plan for a mix of housing based on current and future demographic trends, market trends and the needs of different groups in the community (such as, but not limited to, families with children, older people, people with disabilities, service families and people wishing to build their own homes);
- identify the size, type, tenure and range of housing that is required in particular locations, reflecting local demand; and
- where they have identified that affordable housing is needed, set policies for meeting this need on site, unless off-site provision or a financial contribution of broadly equivalent value can be robustly justified (for example to improve or make more effective use of the existing housing stock) and the agreed approach contributes to the objective of creating mixed and balanced communities. Such policies should be sufficiently flexible to take account of changing market conditions over time’.

1.8 Further guidance is provided through the Government’s Planning Practice Guidance (PPG).

1.9 Emerging national policy proposes a standardised methodology for councils to calculate their overall housing need, and suggests that there should be a streamlined process for identifying the level of housing need for specific groups. It recognises the importance of providing a range of housing including homes for older people and proposes changes to the definition of affordable housing. This SPD includes flexibility to ensure that it would remain relevant in the context of potential changes to national policy.

1.1.2. Local policy

1.10 The Local Plan’s 2029 Vision Statement seeks to deliver ‘new homes (that) meet local needs’ to ‘deliver a connected and vibrant place’. It includes a number of objectives relevant to the delivery of housing including:

(f) ‘Focus the provision for new housing and supporting infrastructure within a number of development sites around Basingstoke town, with local level housing provision in other main settlements, and homes which respond to local needs in smaller settlements’; and

(h) ‘Provide new housing which incorporates a mix of tenure, size and type to meet the borough’s needs and enable accommodation for all, including older people and downsizers, smaller households, families, and resident gypsies and travellers’.
1.11 This SPD seeks to assist in the delivery of these objectives by providing further detail to support the implementation of the following policies:

- Policy SS3 and SS3.1-12 (Greenfield Site Allocations)
- Policy CN1 (Affordable Housing)
- Policy CN2 (Rural Exceptions for Affordable Housing)
- Policy CN3 (Housing Mix for Market Housing)
- Policy CN4 (Housing for Older People/Specialist Housing)

1.12 The policies in the Local Plan were based on evidence from the Council’s Strategic Housing Market Assessment Update, May 2015 (SHMA). This has informed the approach in this SPD in addition to more up-to-date data sources that are referenced in this document.
2. Affordable Housing

2.1. Introduction and overarching approach

2.1 This chapter expands upon the policies in the Local Plan and provides more detail about the principles and processes underpinning the delivery of affordable housing for rent, and to buy, and to help secure a consistent approach towards its provision. It explains how the approach in the Local Plan should be implemented, and how the council will apply reasonable flexibility in response to specific local needs, exceptional site circumstances, and changes in national policy.

2.1.1. Background

2.2 It is important that everyone living in Basingstoke and Deane has the opportunity to live in a decent home they can afford to rent or buy. The delivery of affordable housing is a key priority for the council as highlighted in the Council Plan (2016-20), the Housing and Homelessness Strategy (2016-20), and the Local Plan (2011-29).

<table>
<thead>
<tr>
<th>Housing and Homelessness Strategy (2016-2020)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Framed within the Growth and Quality of life themes of the Council's Plan, the Housing and Homelessness Strategy (2016-20) highlights the importance of maximising the supply of new affordable housing whilst ensuring that the supply is shaped to address key priorities and meet local needs:</td>
</tr>
<tr>
<td>• By the end of the Strategy period, the aim is to achieve delivery of at least 300 affordable homes each year</td>
</tr>
<tr>
<td>• New supply must continue to address acute priority needs and also support those on lower incomes whose needs could be met through affordable home ownership.</td>
</tr>
<tr>
<td>• Choice should not only be increased for those who wish to access home ownership but also older residents who wish to move to accommodation that is more suitable for their needs, and other residents who require suitable alternative accommodation.</td>
</tr>
<tr>
<td>• Available resources must be targeted towards identified and evidence-based priorities and where possible they should be targeted towards locally connected households.</td>
</tr>
</tbody>
</table>

The council’s evolving strategic implementation of its Housing and Homelessness Strategy objectives will rely on the development of supplementary approaches over the lifetime of the strategy, including the meeting of agreed standards and protocols with housing providers as set out in the council’s Tenancy Strategy.

The role of Affordable Home Ownership and the council’s approach to its future provision is being developed.
2.3 Since 2006, the council has had adopted Local Plan policy, supported by Supplementary Planning Guidance\(^1\), requiring eligible schemes to incorporate 40% affordable housing, with priority given to onsite delivery and the provision of rented housing for those in greatest need through Registered Providers. The council has also supported the delivery of affordable housing in rural areas through an adopted Exception Site policy, which has been applied through collaborative work with parish councils and the HARAH\(^2\) rural housing enabling partnership.

2.4 Adopted in May 2016, the council’s current Local Plan, set a framework for seeking planning obligations to secure delivery of affordable housing through Policy CN1 (which relates to threshold affordable housing) and CN2 (Rural Exception Sites).

2.5 Informed by the council’s Strategic Housing Market Assessment Update (2015) and Affordable Housing Needs Assessment (2015), Policy CN1 specifies a requirement for 40% of dwellings on qualifying sites and a tenure split of 70% rented and 30% intermediate housing as a starting point for negotiations. The research identified a high need for affordable housing across the urban and rural parts of the borough, and a need for homes to meet general needs as well as specialist accommodation for older people and people with a disability.

2.6 The National Planning Policy Framework\(^3\) states that councils should set policies requiring affordable housing to be provided on residential development sites where such needs are identified, and that policies should be sufficiently flexible to take account of changing market conditions.

2.7 The council’s strategies recognise the role of affordable housing in creating sustainable, inclusive and mixed communities through the on-site provision of well-integrated and tenure-blind properties. They seek to maximise affordable housing provision over the Plan Period that meets local needs in terms of its amount, tenure, size and type, whilst prioritising households with a local connection to the borough, and where appropriate its rural towns and parishes.

2.1.2. Overarching approach

<table>
<thead>
<tr>
<th>Principle 2.1 Balanced flexibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The council will require 40% affordable housing on all market housing with a tenure split of 70% rented and 30% intermediate products as required by Local Plan Policy CN1. This will be the starting point for discussions.</td>
</tr>
<tr>
<td>• A balanced approach will be taken to affordable housing negotiations, making it possible to be flexible and accept innovation within policy, whilst ensuring that any variations have been justified; meet priority and strategically recognised housing needs and have been subject to relevant financial scrutiny.</td>
</tr>
</tbody>
</table>

\(^1\) S106 Planning Obligations and Community Infrastructure (July 2005) & Affordable Housing Supplementary Planning Document (July 2007)

\(^2\) Hampshire Alliance for Rural Affordable Housing

\(^3\) National Planning Policy Framework (2012) paragraph 50
2.8 The council will approach discussions with developers pragmatically and apply reasonable flexibility where it would optimise the meeting of adopted affordable housing objectives. However, the council will need to ensure that affordable housing proposals are appropriate, address housing need and continue to fit within adopted local policy and boundaries set down by national planning policy.

2.9 Where it has been demonstrated to the council’s satisfaction that a policy compliant scheme would not be financially viable (taking into account the guidance in Section 2.5 of this SPD), the council will approach negotiations pragmatically. The LPA will seek to maximise the provision of affordable housing by making changes to the adopted tenure mix as necessary, subject to meeting identified housing need, and the achievement of mixed and sustainable communities.

2.10 Developers are strongly encouraged to engage in early discussions with the council over housing mix and the detail of the affordable housing, to ensure these are embedded into development concepts and site design from the outset and that proposals meet identified needs and priorities.

2.1.3. What is affordable housing?

2.11 The national planning policy definition of affordable housing is included in the Glossary of the NPPF and is set out in full in Appendix 2.1.

2.12 The present definition encompasses ‘social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market’4.

2.13 The NPPF states that affordable housing should include provisions to remain at an affordable price for future eligible households or for the subsidy to be recycled for alternative affordable housing. Eligibility is determined with regard to local incomes and local house prices, with the provision for those ‘who lack their own housing or live in unsuitable housing and cannot afford to meet their needs in the market’5.

2.14 The present definition of affordable housing is expected to evolve, as indicated in the government’s consultation on the Housing White Paper (2017) and may be broadened through future revisions of the NPPF to include new models of affordable housing, including new affordable home ownership products.

2.15 To help facilitate home ownership, the Government is proposing to introduce a policy expectation that housing sites deliver a minimum of 10% affordable home ownership units6 which can form part of the council’s overall affordable housing requirement. This can include Starter Homes although there will be no mandatory requirement to do so - it will be for local planning authorities to work with developers to agree the inclusion of any Starter Homes alongside other affordable home ownership and rented tenures.

2.16 The revised NPPF is expected to set out some newly defined affordable housing models, but the existing categories of ‘Social Rented and Affordable Rented housing’;

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5 National Planning Practice Guidance Reference ID: 02a-022-20140306, ‘How should affordable housing need be calculated’.
6 Paragraph 4.17 Housing White Paper “Fixing our broken housing market” February 2017
and ‘Intermediate Housing’ are expected to be maintained. Usually owned and managed by Registered Providers or Local Authorities and meeting prescribed requirements, the former may be generalised as longer-term rented accommodation, with rents that are typically between 60% and 80% of average market rates.\(^7\)

2.17 As proposed by Government, ‘Starter Homes’ will be a stand-alone affordable home ownership product. ‘Intermediate Housing’ will include Shared Ownership, Discount Market Sale, Affordable Private Rent (as part of Build to Rent Schemes), equity loans or other low cost homes for sale and intermediate rent (including Rent to Buy). All ‘Intermediate Housing’ models should address the following:

- Be at a cost above social rent but below open market prices;
- Eligibility that is determined with regard to local incomes and local house prices; and
- Remain at an affordable price for future eligible households or for any receipts to be recycled for alternative affordable housing provision or be refunded.

### 2.2. Local Plan Policy CN1: Affordable Housing

#### 2.2.1. When is affordable housing required?

**Principle 2.2** The provision of affordable homes

- Affordable housing will be required in accordance with the site size thresholds set out in national policy.
- Affordable housing should be provided on-site except where equivalent financial contributions towards off-site provision are supported by national policy; or in exceptional circumstances where off-site provision or financial contributions can be robustly justified.

2.18 Since the adoption of the Local Plan, new national planning policy\(^8\) has modified which developments should provide affordable housing. The thresholds set out below supersede the requirements set out in Local Plan Policy CN1, and differentiate between parts of the borough in the North Wessex Downs Area of Outstanding Natural Beauty (AONB) and those outside (as shown on the map in Appendix 2.2).

**On-site provision**

2.19 Affordable housing should be provided on-site to support the objective of creating mixed and balanced communities. However, as set out in Table 2.1, national policy identifies some limited circumstances where a financial contribution should be accepted in lieu of on-site provision.

2.20 However there may also be exceptional circumstances that warrant consideration of either off-site provision or a financial contribution towards off-site affordable housing,

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\(^7\) Affordable Rents are locally capped at Housing Benefit Local Housing Allowance levels.

\(^8\) National Planning Practice Guidance Reference ID: 23b-031-20161116 (Revised November 2016)
which will be permitted at the council’s discretion. Examples of such exceptional circumstances are set out in paragraph 5.11 of the Local Plan and include:

- Impracticable for a Registered Provider to manage on-site affordable housing;
- Bringing existing housing stock back into use for affordable housing;
- Alternative sites being proposed for development would be closer to local facilities; and
- Where off-site provision would lead to a significantly larger number of affordable homes being provided on the alternative site.

<table>
<thead>
<tr>
<th>Inside or outside AONB</th>
<th>Dwellings (net)</th>
<th>Internal Area</th>
<th>Affordable housing requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outside</td>
<td>1-4</td>
<td>&lt;1000 sq. m</td>
<td>No affordable</td>
</tr>
<tr>
<td>Outside</td>
<td>1-4</td>
<td>&gt;1000 sq. m</td>
<td>Equivalent off-site financial contribution</td>
</tr>
<tr>
<td>Outside</td>
<td>5-10</td>
<td>&lt;1000 sq. m</td>
<td>No affordable</td>
</tr>
<tr>
<td>Outside</td>
<td>5-10</td>
<td>&gt;1000 sq. m</td>
<td>On-site provision</td>
</tr>
<tr>
<td>Outside</td>
<td>11+</td>
<td>n/a</td>
<td>On site provision</td>
</tr>
<tr>
<td>Inside</td>
<td>1-5</td>
<td>n/a</td>
<td>No affordable</td>
</tr>
<tr>
<td>Inside</td>
<td>6-10</td>
<td>n/a</td>
<td>Equivalent off-site financial contribution</td>
</tr>
<tr>
<td>Inside</td>
<td>11+</td>
<td>n/a</td>
<td>On site provision</td>
</tr>
</tbody>
</table>

*Table 2.1 Site size thresholds for affordable housing*

2.21 Guidance about how financial contributions should be calculated is set out in Section 2.6.

**Other Requirements**

2.22 Onsite affordable housing or equivalence based off-site financial contributions (taking any other relevant considerations into account such as non-saleable areas) will be required on developments specifically designed for older people falling within Use Class C3, in accordance with Local Plan Policy CN4. Residential care homes and nursing homes (within Use Class C2) are not required to provide affordable housing.

2.23 Affordable housing contributions will be sought from developments that come forward in a piecemeal fashion where the total combined development exceeds the relevant threshold.
2.2.2. The amount and mix that is required

<table>
<thead>
<tr>
<th>Principle 2.3 Amount and mix of affordable housing</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The council will require 40% affordable housing on all market housing with a tenure split of 70% rented and 30% intermediate products as required by Local Plan Policy CN1. This will be the starting point for discussions.</td>
</tr>
<tr>
<td>• 15% of affordable homes should meet enhanced accessibility or adaptability standards to enable people to stay in their homes as their needs change.</td>
</tr>
<tr>
<td>• Where proposals come forward for older persons and specialist forms of housing (within Use Class C3), the council will require onsite affordable housing provision or equivalence-based financial contributions.</td>
</tr>
<tr>
<td>• In accordance with Policy CN4, large scale residential development should consider whether there is an unmet need in the local area for specialist accommodation with affordable tenures that can meet the needs of older people or people with support needs.</td>
</tr>
<tr>
<td>• Specialist accommodation may be sought where a local need exists, and it is in line with the council’s priorities.</td>
</tr>
</tbody>
</table>

2.24 In line with Local Plan Policy CN1, the council requires 40% affordable housing on eligible sites. The calculation of the affordable housing requirement will be based on the net increase in the number of residential dwellings.

2.25 In accordance with national policy, and where applicable, the provision can take into account the vacant building credit which allows for qualifying vacant floor-space to be offset against some of the affordable housing requirement. An explanation of how the council applies the vacant building credit and a worked example is included in Appendix 2.3.

2.26 Where the percentage of affordable housing sought does not amount to a whole number, the number of units sought will be rounded to the nearest whole number (half units should be rounded up).

2.27 The council recognises that flexibility and a willingness to negotiate affordable housing provision is essential where policy requirements would result in an otherwise acceptable development proposal becoming financially unviable. As set out in the supporting text of the Local Plan, the requirements of Policy CN1 are the starting point for discussions, however, for a viability case to be considered, development proposals must be supported by robust, detailed evidence capable of withstanding professional examination as set out in Appendix 2.4.

2.28 Although the council’s adopted policy position sets a requirement of 40% affordable housing as a starting point for discussions, this does not preclude the scope for proposals that include more than 40% affordable housing and an exceptionally agreed tenure mix.

2.29 On larger schemes, in the event that less than 40% affordable housing is proposed in any given phase of the development for reasons other than viability, then reserved
matters will be required simultaneously for any compensating phase (or another equally robust corrective mechanism). This is to ensure there is no net loss of provision. Further guidance about how the council will respond to viability issues can be found in Section 2.5.

Tenure split

2.30 Given the type and scale of existing and future predicted housing need within the Borough, the Local Plan evidence base indicated that a very significant proportion of affordable housing should be secured ‘for rent’ to assist households in greatest need and who would be eligible for social housing (i.e. Social Rent or Affordable Rented models).

2.31 Forms of intermediate housing can also incorporate homes for rent, however tenures are most commonly associated with affordable home ownership, including shared ownership and shared-equity. Proposals outlined in the Housing White Paper (2017) suggest that presently accepted models of intermediate housing may be extended to permit Starter Homes and Discount Market Sale, along with more specialised forms of intermediate-rent (connected to Build To Rent and Rent to Buy schemes). The acceptance of models at a local level will be subject to proposals being affordable and demonstrably accessible to those in need, relative to household incomes and market costs.

2.32 Should it progress, the Government’s proposal\(^9\) to require a minimum of 10% of all homes on individual sites to be for affordable home ownership will already be achievable within the adopted Local Plan requirements for intermediate housing\(^10\).

2.33 In line with the Housing White Paper, the form and proportions of intermediate products (including affordable home ownership) will be subject to negotiation and agreement with the council, to ensure that proposals appropriately and affordably address priority and strategically recognised housing need, and any evidenced local need, whilst also according with the requirements of National Planning Policy.

2.34 Affordable Rented and Social Rented forms of housing will continue to be prioritised to address the highest levels of need, with initial rents for both models being capped at no more than Local Housing Allowance to ensure affordability relative to market rents.

2.35 It is recognised that in some circumstances it may be necessary to adopt a flexible approach to tenure mix requirements, when doing so would help to address proposals that would otherwise be economically unviable; when the need for a different tenure mix is driven by site specific or delivery-based reasons; or where it is proven that doing so would achieve a better fit with prioritised and strategically recognised localised needs.

2.36 It should be anticipated that any variation to the adopted tenure split will require the submission of a demonstrated and justified case, supported by evidence showing that the degree of adjustment is necessary and that housing need will continue to be met.

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\(^9\) Housing White Paper para A.126

\(^10\) The Housing White Paper indicates a possible requirement for 10% of all new homes to be affordable home ownership products. Of the 40% affordable housing, Policy CN1 requires 30% to be intermediate products – equivalent to 12% of the overall number of dwellings.
Such cases will be subject to council testing and approval however the depth of evidence required will be commensurate with the degree of variation being sought.

**Size mix**

2.37 As a general borough-wide guide, the council will seek the following size mix of affordable housing however individual proposals will be influenced by site specific and delivery considerations, and local housing need evidence taken from housing registers, strategic information published by the council, or local housing needs studies undertaken to a methodology that is agreed with the council (and that has taken wider housing need and demand factors into account).

<table>
<thead>
<tr>
<th></th>
<th>1 bedroom</th>
<th>2 bedrooms</th>
<th>3 bedrooms</th>
<th>4+ bedrooms</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordable Housing</td>
<td>36%</td>
<td>43%</td>
<td>16%</td>
<td>5%</td>
<td>100%</td>
</tr>
</tbody>
</table>

*Table 2.2 Affordable housing size mix (Source: BDBC Housing Register and Help to Buy South Register)*

**Dwelling type**

2.38 The mix of houses and flats will depend upon the characteristics of the site and the type of demand. Where market accommodation will include a mix of flats and houses, it is expected that the proportionate mix will be similar for both market and affordable housing.

**Older people and those with support needs**

2.39 Demographic trends show that people are living longer and the proportion of older people within the borough’s population is increasing. Amongst those in advanced older age (85+ yrs.), the majority of people will need some form of care.

2.40 Local Plan Policy CN4 (Housing for older people/specialist housing) requires that where there is evidence of an identified unmet need in the local area and the location is acceptable in all other respects, new large scale residential developments (of approximately 200 or more units) should include specially designed housing/specialist accommodation to meet the needs of older people and people with support needs. Where the identified need is for specialised or supported affordable accommodation (for households who may or may not require adapted homes), this could meet all or part of the site’s affordable housing requirement.

2.41 Under some circumstances it may also be desirable for certain forms of supported affordable housing to be integrated amongst ‘general need’ housing and be non-specific by design. Where such needs have been evidenced, opportunities and approaches should be identified and explored with the council.

2.42 A minimum of 15% of affordable homes should be built as accessible and adaptable homes, meeting the standard set in the Building Regulations Part M4(2) (as required by Local Plan Policy CN1). Developers may provide wheelchair adaptable or wheelchair accessible dwellings that meet Part M4 (3) in lieu of accessible and adaptable dwellings (Part M4(2)) where a need has been demonstrated. Where building to this higher standard results in viability concerns, the council will consider
reducing the overall requirement of accessible and adaptable dwellings in order to deliver the required wheelchair adaptable or wheelchair accessible dwelling(s).

2.2.3 Delivery requirements

Who can provide affordable housing?

**Principle 2.4 Policy CN1 Affordable housing providers**

- The council requires affordable homes to be owned and managed by providers who are registered with Homes England.

- Under exceptional circumstances the council may approve the provision of certain forms of affordable housing by non-Registered Providers, subject to equivalent safeguards, benefits and protections being provided by the alternative body, and that legal mechanisms ensure these are monitored and maintained in the long-term.

2.43 Registered Providers (RPs) are the council's preferred agencies given their regulated activities and because the council is satisfied they ensure proper long term management of the affordable housing, and will work with the council to meet shared housing and sustainable community objectives, and allocate rented housing through the council's Choice Based Lettings scheme.

2.44 Emerging national housing policy indicates that, in time, new models of affordable housing may come forward that could be owned or managed by other suitable bodies, and there may be some specific circumstances where the council may accept alternative approaches.

2.45 Where proposals come forward that are permitted within the scope of existing National Planning Guidance, applicants will usually be required to secure council approval for such an approach at outline stage, demonstrating how affordable housing proposals will be made available to eligible occupiers (including giving the council rights to make nominations); offer all of the safeguards and benefits (to the council and occupiers) that are equivalent to RPs, including measures to protect subsidy; and provide certainty about what would happen to the homes and to the occupiers/tenants if future management or organisational problems arose.

2.46 In line with conventional delivery mechanisms associated with RPs, measures and control mechanisms would be required within legal planning agreements or planning conditions to ensure that the occupation, ownership, nomination and disposal principles associated with affordable housing are fulfilled and preserved in the long-term.

**Ensuring delivery and deliverability**

2.47 Mechanisms will need to be embedded within legal planning agreements limiting the occupancy of market dwellings to ensure the timely and certain delivery of affordable housing.
2.48 Other standard mechanisms and exemptions will be permitted to take account of legislative rights, the needs of lenders to dispose of affordable homes under repossession conditions, and risks faced by shared-owners (e.g. if locally connected buyers are not found within a reasonable nomination/marketing period).

2.49 Given that the context for securing affordable housing is continually changing as a result of national policy and the needs and demands of regulators, funders, and providers, the council will be prepared to review respective policy requirements, where it is demonstrated with independently verified evidence that new barriers are preventing the successful delivery of affordable housing. Nonetheless in doing so, the council will seek to ensure that any changes or flexibilities are kept to the necessary minimum.

Council nominations and local connections

2.50 Nomination arrangements will be required to ensure that affordable dwellings that become vacant are prioritised for households in housing need and who cannot afford to meet their needs on the open market, as nominated by the council (or a body approved by the council) and that will assist with meeting its Local Housing Authority duties.

2.51 Priority will be required for households who have a defined local connection to the borough through residency, family connections or employment. In settlements outside urban areas, additional priority will be given to those with residency, family or employment connections to rural towns and parishes, where doing so would accord with locally adopted housing policy at the point of granting planning consent, and would not impede the successful delivery, occupation, and where applicable, the resale of affordable homes.

Protecting subsidy and replacing affordable housing

2.52 To protect the subsidy value that is created by Local Plan policy and to ensure that the need for affordable housing continues to be met in the future, provisions will be required that either preserve the status of the affordable housing or to recycle the subsidy into new affordable housing provision within the borough, unless permitted otherwise under national planning policy.

2.2.4. Achieving integrated layout and design

**Principle 2.5 Mixed and integrated communities**

- **Affordable housing must be distributed within the development to support the creation of integrated and mixed communities, as required by the Local Plan.**

2.53 The council advocates a tenure blind approach to housing development to ensure that new developments contribute to the creation of mixed and inclusive communities. The affordable homes should be spread throughout developments in clusters and be fully integrated with the market homes, with a consistent approach towards external design, materials and finishes.
2.54 All affordable homes will be required to comply with planning policy requirements at the time planning permission is sought. These relate to issues such as design, accessibility, amenity, and water efficiency.\(^{11}\)

2.3. Local Plan Policy CN2: Rural exceptions for affordable housing

### Principle 2.6 Rural exception sites

- **Small scale residential development designed to meet the need of local people unable to meet their own needs in the housing market** will be permitted on sites outside settlement policy boundaries, in accordance with Local Plan Policy CN2.
- **In exceptional circumstances a proportion of market housing may be permitted** to enable the delivery of a scheme - where this is required on viability grounds and if no other sources of subsidy are available.
- **It is expected that proposals will be brought forward in partnership with Registered Providers in an ownership and housing management capacity.**
- **Planning applications must demonstrate there is a local need for the number, tenure and type of homes proposed, and should demonstrate that a site selection process has been undertaken to identify and assess potential opportunities, and that justifies the proposal as the best available and deliverable option.**

2.55 Local Plan Policy CN2 permits rural exception sites (RES). These are small scale developments of affordable housing outside existing settlements and which meet a recognised need within that community.

2.56 The amount, type and tenure of affordable housing to be provided must address the needs of households who are either current residents or have an existing family or employment connection.\(^{12}\) This should be demonstrated through up-to-date parish need surveys or research using methodologies supported by the Local Planning Authority. Such research should be undertaken with the support of the local town or parish council (or parish meeting) and should support the specific number, tenure and size mix of the homes proposed.

2.57 Exception sites should usually not exceed fifteen dwellings, and should be proportionate to the size of the settlement and the level of need arising.

2.58 The proposed site (or sites) should be selected as the preferred and deliverable option following an evidenced scoping exercise and sequential test of potential sites capable of meeting the locally identified need.

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\(^{11}\) Local Plan policies EM9 (Sustainable Water Use) and EM10 (Delivering High Quality Development). Appropriate guidance is also provided in other documents such as the council’s Design and Sustainability SPD and Parking Standards SPD.

\(^{12}\) National Planning Policy Framework glossary, ‘Rural Exception Sites’
2.59 Rural exception site proposals should not result in an isolated form of development and should be integrated into the existing community, and therefore be adjoining or in close proximity to existing settlements (as defined in the Local Plan) to minimise their impact upon the character and appearance of the countryside.

2.60 Sites must be suitable for development and the design and layout of the scheme should be informed by the opportunities and constraints of the site, for example taking into account landscape character, the historic environment and any highways and infrastructure impacts (in line with Local Plan policies). The construction, materials and external finishes should be sympathetic to those used locally, and ‘off the peg’ standard house types will generally not be acceptable.

2.3.1. Market housing cross-subsidy
2.61 Outside settlement policy boundaries, residential development is strictly controlled - land is often in agricultural use with a land value that is a fraction of residential land. The rural exceptions policy takes advantage of this lower land value to enable the delivery of affordable homes. Under exceptional circumstances Policy CN2 allows for a proportion of market housing to enable delivery of a scheme where this is required on viability grounds and if no other sources of subsidy are available.

2.62 Proposals that incorporate market dwellings will need to be supported with a detailed and transparent financial development viability assessment demonstrating that the number of market dwellings is the minimum essential for successful delivery of the development, in line with the guidance in Section 2.5 of this SPD. In all cases, the affordable homes should comprise a greater proportion of units in comparison to the market units proposed. Where market housing is proposed, alternative site options that would not require cross-subsidy should be thoroughly explored through the aforementioned site scoping exercise.

2.3.2. Types of market housing on exception sites
2.63 Where it is demonstrated that an exception site could only be delivered and made viable as a result of cross-subsidy, evidence of sequential testing will be required to ensure that the proposed market homes are of a type and model that result in wider community benefits, e.g. addressing any locally identified need, such as demand for custom build and self-build homes, or forms of market housing that may enable local downsizing or meeting local arising demand from first time buyers.

2.64 The council will take a balanced view as to the best provision for a site taking into account the amount of development that would be required to support the affordable provision and the needs in the local area.

2.3.3. Providing and preserving affordable housing on exception sites
2.65 To protect and preserve affordable housing in perpetuity, and to serve the best interests of those who may live in affordable rented accommodation, it is expected that exception site proposals will be brought forward in partnership with Registered Providers in an ownership and housing management capacity. Should alternative ownership bodies be proposed for exceptional reasons, e.g. as a part of community-led housing initiatives, it would be necessary to ensure that no risks are posed to the
protection and preservation of the affordable homes in perpetuity, that all of the benefits and safeguards that are usually associated with the ownership and management of affordable homes by Registered Providers are guaranteed.

2.66 Affordable Housing on exception sites must be retained in perpetuity, and strict controls will be required within S106 agreements to ensure that prioritisation for first and all subsequent occupations will be given to households with local connections to the parishes and communities that are served, with flexibility to reflect and enable local influences. To ensure that all forms of affordable housing are appropriately prioritised and allocated in the long-term to those with local connections and in greatest need, nomination and allocation mechanisms will be required that are approved by the borough council.

2.67 Carefully considered and approved mechanisms will be permitted within legal planning agreements and nomination arrangements to address any future arising risks of no households coming forward with local connections to the parish or community when a Rural Exception dwelling becomes available. Strictly controlled cascades will be permitted that allow the scope to widen catchment areas over time to prevent prolonged voids within affordable rented homes and to create opportunities for affordable home-owners (and their lenders) to source buyers from further afield if locally connected buyers are not found within a reasonable period.

2.4. Planning application requirements

<table>
<thead>
<tr>
<th>Principle 2.7 Planning application requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The council will seek to engage with developers from the outset to ensure that affordable housing is factored into the initial concept and that the most appropriate provision is being made.</td>
</tr>
<tr>
<td>• Adequate information should be provided with planning applications to provide a sufficient level of certainty about the proposed provision and to demonstrate that planning policy requirements would be met.</td>
</tr>
</tbody>
</table>

2.68 Proportionate levels of information should be provided throughout the planning process to provide the council with certainty over the nature and timing of the affordable housing supply.

2.69 The council strongly encourages applicants to discuss housing proposals in advance of an application being submitted to ensure that the provision is factored into the initial concept and that the most suitable and acceptable approach is being taken. This should usually include discussions with Registered Providers.

2.4.1. Outline planning applications

2.70 Outline planning applications for schemes that include affordable housing must be accompanied by an Affordable Housing Statement (this is a requirement of the council’s planning application validation checklist). This will provide the basis for the heads of terms of any legal agreement and should include:
• Headline details about the overall level of affordable housing provision and the tenure mix proposed, and any variations within each phase or reserved matters application;
• An indicative overall affordable housing mix by bedroom size;
• A commitment to comply with the detailed requirements of Local Plan Policy CN1 and this SPD, including principles about how the affordable provision will be integrated with the market housing; and
• Any associated evidence supporting deviations from policy requirements.

2.4.2. Full and reserved matters planning applications

2.71 With a full planning application, or with each reserved matters submission, it will be necessary to provide an Affordable Housing Scheme identifying in detail how and where the affordable homes will come forward as part of the development. In the case of reserved matters applications, this information should comply with the outline consent.

2.72 To be approved, Affordable Housing Schemes must include:

• the proposed layout of the scheme identifying the affordable plots and showing integration;
• the precise tenure mix;
• details of the unit type (house, flat, bungalow etc.) of each unit;
• size and space details for each unit including the number of bed-spaces, number of bedrooms and the ground floor internal area;
• details of those units to be constructed to enhanced accessibility or adaptability standards; and
• details of the intended Registered Provider.

2.5. Viability

**Principle 2.8 Demonstrating viability**

• Applicants will be required to submit a detailed and transparent financial development viability assessment where schemes do not meet policy requirements, in accordance with Local Plan Policy CN1. The assessment should be carried out on a residual valuation basis and all the inputs should be justified with robust and detailed evidence that is capable of verification.

• The council will commission a review of the viability study for which the applicant will bear the cost.

2.73 The Local Plan and the council’s affordable housing requirements have been tested to ensure they are viable at a borough-wide level. However, it is recognised that there may exceptionally be site-specific circumstances where the nature of the development or the characteristics of a site may make delivery of the full affordable housing requirement economically unviable.
National planning policy puts emphasis on the need for Local Authorities to consider the viability of schemes carefully\(^\text{13}\) and to be flexible when planning obligations would cause development to be unviable. The council approaches affordable housing negotiations pragmatically but with an emphasis on evidence. Negotiations will be treated objectively and impartially, but also consistently. Any decisions will be evidenced-based and robustly justified, whilst also being in accordance with relevant national guidance\(^\text{14}\) or guidance that supersedes it.

Where an applicant considers their proposal would be unable to meet the policy requirements, this must be demonstrated through a detailed and transparent financial development viability assessment. The type of evidence that should be provided is set out in Appendix 2.4. The council will commission a review of the viability study by an independent RICS valuer, for which the applicant will bear the cost.

The viability assessment should be carried out on a residual land value basis, using recognised methodology that accords with RICS guidance, which, as a baseline, applies policy compliant assumptions and tenure mix, reflecting conventional affordable housing values associated with Registered Provider provision. The assessment should generally be based upon current costs and values (taking any other relevant considerations into account, such as non-saleable areas), except where a scheme would be phased over the medium to longer term where changes in costs and values may be considered\(^\text{15}\). Any negotiations to move away from policy must be fully justified with detailed evidence. Any abnormal or exceptional development costs should be supported with specialist reports and technical data, capable of expert verification.

The council recognises that certain information within such a submission is likely to be commercially sensitive. Where this is the case, the applicant must make clear the elements that are commercially sensitive however the council reserves the right to make judgements as to which information is released for public view in accordance with national guidance.

Appendix 2.4 sets out the minimum level of information that the council would expect to be submitted with a viability appraisal to meet the RICS valuation methodology.

**2.5.1. Responding to viability**

The review of the viability information will help to determine the amount and type of affordable housing that could viably be provided. Where it is accepted that development is not viable in current market conditions with a fully policy-compliant scheme, the council will have regard for the level of subsidy that is available and coupled with a review of local needs, will conclude the most fitting solution taking a range of factors into account.

Priority will be given to achieving the maximum number of affordable homes, subject to council approval that any changes to the adopted local plan tenure mix will continue to meet an identified need and result in a mixed and sustainable community.

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\(^\text{13}\) National Planning Policy Framework (2012) paragraph 173 and NPPG ID: 10-019-20140306

\(^\text{14}\) Draft Planning Practice Guidance (March 2018)

\(^\text{15}\) National Planning Practice Guidance Reference ID: 10-017-20140306
2.81 It is recognised that where larger schemes (i.e. those incorporating multiple phases) will be built out over a number of years, the market (and development viability) is likely to change over the course of the development. In such cases, the council will adopt approaches that assist the developer in bringing the site forward without delay, but give the council the ability to reassess viability in the future and to redress affordable housing contributions should the market improve. The council will establish the principles of affordable housing provision at the time of the outline planning permission. Where a reduction in affordable housing provision is agreed on viability grounds, mechanisms should be expected that enable later phases of the development to increase provision to deliver a policy-compliant scheme.

2.6. Financial contributions

**Principle 2.9 Equivalent financial contributions**

- In exceptional circumstances financial contributions of equivalent value will be permitted in lieu of on-site provision in accordance with Local Plan Policy CN1.

2.82 Affordable housing should be provided on-site except in the limited circumstances set out in Section 2.2 where off-site provision or financial contributions towards off-site provision may be acceptable.

2.6.1. How should commuted sums be calculated?

2.83 The level of financial contributions sought will reflect the equivalent development cost of meeting affordable housing policy requirements on-site.

2.84 To be ‘equivalence’ based, a financial contribution will reflect the difference between the Gross Development Value (GDV) of a given proposal without onsite affordable housing and the GDV of a given development that includes a policy compliant element of affordable housing. The financial contribution equates to the subsidy (or loss of income) that a developer would be required to forgo, if they were to comply with policy on-site.

2.85 Such calculations usually require a Residual Land Valuation exercise comparing the financial impact of including and excluding a policy compliant element of affordable housing. However, where circumstances involve a very small number of affordable homes, it may be possible to reach defensible conclusions using a comparative market valuation exercise and value information obtained from Registered Providers.

2.86 In any event, the council will reserve the right to refer viability and valuation evidence to an external RICS valuer for verification, usually at the cost of the applicant.

2.6.2. Spending financial contributions

2.87 The council’s S106 planning legal agreements normally require financial contributions to be spent within ten years, however the council will aim to allocate and spend the money as soon as possible to meet local needs.
2.88 To help meet this objective financial contributions towards affordable housing will be made available towards the provision of affordable housing in generality, and available for allocation throughout the Borough with immediate effect.
3. Mix of market homes

3.1. Introduction

3.1 There is a need for a well-integrated mix of homes of different types, sizes and tenures across the borough.

3.2 Securing a mix of homes will enable the borough’s needs to be met whilst also helping to create mixed and balanced communities. Communities that contain a good mix of homes have greater potential to support a range of local services and facilities including shops, schools and community buildings. They are also likely to be home to people of all ages, resulting in activity in the street at all times of the day, increasing the potential for social interaction.

3.3 The purpose of this chapter is to build upon the findings of the Strategic Housing Market Assessment (2015) to provide further detail about how the housing mix requirements of Local Plan Policy CN3 should be implemented. This will help to ensure that the mix of dwellings provided through new development, together with the existing housing stock, best meets the future needs of the borough.

3.2. Planning policy and legislative context

3.4 The National Planning Policy Framework\textsuperscript{16} requires Local Planning Authorities to plan for a mix of housing, based upon current and future demographic trends, including identifying the size, type, tenure and range of housing that is required, and reflecting local demand.

3.5 Local Plan Policy CN3 reflects these requirement and requires a mix of market homes in terms of type and size.

![Policy CN3 – Housing Mix for Market Housing](image)

3.6 Neighbourhood Development Plans may also set their own specific housing mix requirements for their local area (for example, Sherborne St John), which sit alongside the Local Plan’s policy framework.

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\textsuperscript{16} National Planning Policy Framework paragraph 50.
3.3. Delivering a mix of homes

3.7 Housing mix should be considered early in the planning process and form part of pre-application discussions. Planning applications for two or more net new dwellings should be supported by information that clearly sets out the housing mix for market and affordable dwellings, and explains and justifies the mix proposed. The information provided should be proportionate to the scale of development proposed and the extent to which it deviates from the approach set out in Principle 3.1.

3.3.1. Type and size mix

<table>
<thead>
<tr>
<th>Principle 3.1 Market housing type and size mix</th>
</tr>
</thead>
<tbody>
<tr>
<td>• In order to deliver balanced and sustainable communities, the council will seek a range of dwelling types and sizes that meet the requirements of Local Plan Policy CN3 and made Neighbourhood Plan policies, having regard to the location and accessibility of the development, and the character and context of the site and surrounding area.</td>
</tr>
<tr>
<td>• The evidence highlights a borough-wide need for small family homes and homes suitable for older people wishing to downsize. Development should therefore principally focus upon a mix of two and three bedroom dwellings (particularly houses), with only a limited requirement for homes with four bedrooms or more, which should normally comprise no more than 30% of the market homes in the development.</td>
</tr>
<tr>
<td>• The mix and type of housing shall be justified as part of any submission.</td>
</tr>
</tbody>
</table>

3.8 It is important that new development delivers a range of dwelling sizes to meet a range of needs. As set out in Appendix 3.1, the evidence highlights the need for a mix of new homes, with a particular borough-wide requirement for homes with two and three bedrooms. This is due to both the borough’s ageing population which will result in an increase in one and two person households and the trend towards smaller households throughout life (for example, families having fewer children, and people living alone through choice or relationship breakdown).

3.9 There is currently a high level of under-occupation in the housing stock, particularly amongst older age groups. The provision of smaller houses (including ‘age friendly homes’ - see Section 4.3) that are attractive to older people can help to free up family dwellings for which there will be a continuing need. There is also a need to meet the needs of single under 35s through the provision of sustainable, well-designed and affordable options.

3.10 It is recognised that different housing mixes will be appropriate in different locations and across different character areas of large sites. In the centres of settlements, where there is a good or reasonable range of services or public transport provision, it will be appropriate to have a greater focus upon the provision of smaller homes, and Local Plan policy therefore supports a greater proportion of flats. The council’s work with rural communities and neighbourhood planning groups has highlighted concerns about the predominance of larger dwellings in rural areas and the need to ensure
smaller dwellings are provided as part of a mix to allow older residents to downsize and free-up accommodation for families.

3.11 Development proposals should be robustly justified with specific regard to the criteria in Local Plan Policy CN3. It may be appropriate for proposals to be supported by a housing needs surveys or other primary research undertaken using a methodology agreed by the council.

3.12 In considering the mix of unit sizes, the council will consider whether rooms would be likely to be used as bedrooms even if they are not identified as such on the plans (based upon their location within the home and their size). This will be considered on a case by case basis taking into account whether the room could accommodate a single bed and an appropriate amount of storage.

3.13 The Local Plan’s supporting text\(^{17}\) sets out that ‘for smaller developments (typically those of 3 or less units) it may not be appropriate to meet the requirements of the policy’. Although it is recognised that it may be more difficult to provide a mix of unit types on the smallest sites, where it is suitable on the site, the development should still provide a range of unit sizes.

3.14 The delivery of different types and sizes of market housing will be monitored through the council’s Authority Monitoring Report and kept under review.

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\(^{17}\) Local Plan Paragraph 5.29
4. Housing for older people and those in need of care

4.1. Introduction

4.1 Trends show that people are living longer and the proportion of elderly people in our population is increasing. As the post-war cohort and 1960s baby boomers enter older age, the population aged over-65 in Basingstoke and Deane is forecast to increase by 14,000 people 2014-29, such that by 2029 will make up 21% of the borough’s population. The number of residents aged over 85, where the majority of people will need some form of care, is predicted to double over the same period\textsuperscript{18}.

4.2 Housing quality and suitability has a direct impact on the health and wellbeing of the occupants of a home so there is a need to plan positively for the changing needs of older people and those in need of care. This is recognised by the council’s Housing and Homelessness Strategy 2016-20 which identifies the provision of accommodation suitable for residents’ needs as a key issue.

4.3 The demographic change is forecast to result in an increased number of older people living alone with consequences for loneliness and isolation in old age\textsuperscript{19}. There would also be an increased number and proportion of older people living in couples as both spouses survive into old age. If current occupancy trends continue, this is likely to result in high levels of under-occupation in the housing stock as these smaller households stay in family-sized homes.

4.4 It is recognised that the term ‘older age’ covers two or even three generations and the group is very diverse with a range of needs, aspirations and incomes. The majority of older households (65+) in Basingstoke and Deane own their own home (76%) and the vast majority have paid off their mortgage\textsuperscript{20}. These households are likely to have substantial equity and a desire to own their own home. Almost a quarter of older households live in either social (19%) or private rented housing (5%), so do not have equity in their homes and their choices may be more limited.

4.5 These varying needs and incomes may be met through the provision of mainstream housing that may be suitable for older people (and can be adapted or designed with ageing in mind), or through the delivery of specialist accommodation. It is therefore important to deliver a range of different housing for older people, both in the social and private sectors, available to meet needs across the borough.

\textsuperscript{18} 2014-based Sub National Population Projections
\textsuperscript{19} http://documents.hants.gov.uk/adultservices/older-people/older-people-well-being-strategy.pdf
\textsuperscript{20} Source: Census 2011
4.2. Planning policy and legislative context

4.2.1. National Policy context

4.6 The National Planning Policy Framework (2012) sets a requirement for Local Authorities to provide a mix of homes to meet their current and future needs, including provision for older people (paras 47 and 50), and this is explained further in the Planning Practice Guidance. The Neighbourhood Planning Act (2017) and the Housing White Paper (Fixing our broken housing market, 2017) show the Government’s intention to strengthen these requirements.

4.7 The Planning Practice Guidance recognises that ‘many older people may not want or need specialist accommodation or care’, and prefer to stay in general housing ‘that is already suitable’ or that ‘can be adapted to meet a change in their needs’21. This reflects the Government’s aspiration that older people should live independently for as long as possible, but highlights that some may want or need specialist accommodation.

4.2.2. Local context

4.8 The Basingstoke and Deane Local Plan 2011-2029 sets out a strategy for development in the borough and plans to meet the needs of older people in line with the aims of the Housing and Homelessness Strategy (2016-2020).

4.9 Policies CN1 (Affordable Housing) and CN3 (Housing Mix for Market Housing) seek to future-proof new housing by setting requirements for accessible and adaptable homes (for market and affordable housing respectively) to enable people to stay in their homes as their needs change. Policy CN4 (Housing for Older People / Specialist Housing) supports the provision of housing specifically for older people, and sets criteria for what types of location would be suitable. It also seeks to secure provision for older people and people with support needs on larger residential sites where a local need exists. Policy CN7 (Essential Facilities and Services) permits ‘essential facilities and services’ (the definition of which specifically includes nursing and residential care homes) adjacent to settlements where it can be demonstrated that they meet an identified local need.

21 Planning Practice Guidance Ref ID: 02a-021-20150326.
4.3. Mainstream housing suitable for older people

4.10 The majority of older people in Basingstoke live and will continue to live within mainstream housing within the owner occupied sector\(^{22}\).

4.11 The council undertook a Housing Needs Survey with local residents over the age of 55 in summer 2017 which identified that 40% of respondents were planning to move within the next five years. Most of those indicated an intention to move in the near future said that their current home was too large, too expensive or not suitable for older people. 80% of those people wanting to move said that they wanted mainstream housing, and expressed preferences for two bedroom properties, particularly bungalows\(^{23}\).

4.12 It is therefore important to ensure the size, mix, design and location of new homes gives consideration to the needs of older residents, and that properties are future-proofed to allow the occupant to maintain an independent lifestyle. This is reflected in the requirement for small and medium-sized homes in the housing mix section of this SPD. Self-build and custom housebuilding may also offer an opportunity for residents to customise their homes to meet their needs.

4.3.1 Age-friendly homes for older people

**Principle 4.1 Desirable accommodation for older people**

- The delivery of attractive homes, suitable for ageing, in suitable locations will be encouraged.

4.13 Developers may wish to provide dwellings that are particularly suited to older people.

4.14 Where occupation is restricted to older occupiers (and this is secured through the Section 106 legal agreement), it may be possible to justify approaches to issues such as car parking and garden sizes that might otherwise not be acceptable. In such cases, the council will remove permitted development rights for the homes to be extended to ensure that they remain suitable for these occupiers in perpetuity.

4.15 A report by the University of Sheffield\(^{24}\) highlighted how the housing market could respond to older people’s key housing aspirations. Providing something more suitable to their lifestyle may not involve less space. The following measures make homes ‘suitable for ageing’ and are strongly encouraged:

- Providing a mix of homes including smaller units, generally two bedroom (see SPD Chapter 3);
- Provision of single storey house types including bungalows as part of a mixed stock;

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\(^{22}\) More Choice, Greater Voice

\(^{23}\) The sample size of this survey was low, but these findings align with national surveys and a previous survey undertaken by the Council in 2005.

\(^{24}\) [https://www.housinglin.org.uk/_assets/DWELL_DesigningWithDownsizers.pdf](https://www.housinglin.org.uk/_assets/DWELL_DesigningWithDownsizers.pdf)
Providing fewer bedrooms but with larger rooms, storage, and adaptable space that can be used flexibly;
Manageable outdoor space for gardening;
Dedicated resident and visitor parking; and
Where possible to encourage a higher proportion of accessible and adaptable homes.

4.16 Such units are likely to be more successful if they are located in places with good access to shops, amenities, services and social opportunities, so that the wider environment support the occupants’ needs.

4.3.2 Accessible and adaptable homes

Principle 4.1 Enabling people to stay in their homes as their needs change

- 15% of affordable and market homes should meet enhanced accessibility or adaptability standards in line with Local Plan policy. Additional provision is strongly encouraged.

4.17 It is important to ensure homes are flexible enough to meet the changing needs of residents as they get older. Following the Housing Standards Review in 2015, the Government determined that such standards should only be set with reference to enhanced Building Regulation standards as set out in Approved Document M Volume 1, 2015 edition.

4.18 Local Plan Policy CN1 requires 15% of affordable homes to meet enhanced accessibility or adaptability standards. Policy CN3 requires 15% of market homes to meet this standard. These are minimum requirements, and developers are strongly encouraged to provide greater proportions.

4.19 By the nature of the proportional requirement, the standard is only applicable to developments of seven units or more. Although developers should aim to deliver 15% of the affordable homes and 15% of the market homes to the advanced standards, development should aim to achieve a net of 15% accessible and adaptable homes across the whole development.

4.20 Such requirements can normally be met through compliance with M4(2) of Building Regulations (accessible and adaptable dwellings) (or a subsequent government standard), which allows dwellings to be easily converted to a wheelchair standard at a future date dependent upon the occupant’s future need. However M4(3) dwellings (wheelchair user dwellings) may exceptionally be sought where there is an identified local need.

4.21 Full or reserved matters application should identify which dwellings will be constructed to advanced accessibility standards. On larger sites, these should be sited in the most accessible locations so that residents with care needs have easy access to community facilities and public transport links. Applications should demonstrate that the following could be achieved for each of the M4(2) dwellings:
• A step-free access to the dwelling (with gradient of any ramps limited as per the Regulations);
• A step-free route between the dwelling’s parking bay and its entrance;
• Where the parking is within the private curtilage of the dwelling (but not within a carport or garage) at least one parking space should be a standard parking bay that can be widened to 3.3m;
• Where communal parking is provided to blocks of flats, a parking bay should be provided close to the communal entrance with a minimum clear access zone of 900mm to one side.

4.22 It will generally not be necessary to demonstrate that the internal layouts of buildings meet the enhanced accessibility standard as part of the planning application, and compliance will be secured by condition.

4.4. Specialist housing

4.4.1. What is specialist housing?

4.23 Specialist housing for older people and those in need of care covers a broad spectrum of accommodation with varying levels of care. Definitions are set out below:

<table>
<thead>
<tr>
<th>Sheltered housing (Use Class C3)</th>
<th>Including some form of scheme manager (warden) service but no registered personal care. Will usually include shared facilities such as a residents’ lounge, laundry and garden.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhanced sheltered housing (Use Class C3)</td>
<td>Typically include 24/7 staffing cover, at least one daily meal will be provided and there may be additional shared facilities to those in sheltered housing.</td>
</tr>
<tr>
<td>Extra care housing (public sector) or Assisted living (private sector) (Use Class C3)</td>
<td>Accommodation that allows residents to live independently. Care and support is available on site when required in addition to a range of communal facilities.</td>
</tr>
<tr>
<td>Residential care (Use Class C2)</td>
<td>Where a care home is registered to provide residential (personal) care only.</td>
</tr>
<tr>
<td>Nursing care (Use Class C2)</td>
<td>All beds are allocated to nursing care.</td>
</tr>
</tbody>
</table>

Source: Based upon SHOP@ definitions

4.24 Enhanced sheltered accommodation and extra care housing may both be considered as ‘housing with care’. Housing with care is accommodation which allows older people to live independently with access to care and support and can delay moves into residential care.

25 www.housinglin.org.uk
4.25 It is recognised that there are developments in technology and in forms of living, and the council will welcome innovation in the provision of housing where it will better meet older people’s needs.

4.4.2. Where should specialist housing be located?

**Principle 4.3 Delivery of specialist housing**

- The location of housing specifically designed to meet the needs of older people or specialist accommodation should be appropriate in terms of access to facilities, services and public transport taking into account the mobility of the intended occupants and their needs.

- In accordance with Local Plan Policy CN4, new residential developments of 200 or more homes shall provide information to assess whether there is an unmet need for specialist housing in the local area. If there is an unmet local need, this should be met as part of the development proposal unless developers can provide information to demonstrate that it would be unviable or inappropriate on their site.

4.26 In accordance with Local Plan Policy CN4, accommodation for older people should be located in sustainable locations that are appropriate in terms of access to facilities, services and public transport, and that take into account the likely needs (including the level of mobility) of the future occupiers. Local Plan Policy CN7 exceptionally permits nursing and residential care homes (in Use Class C2) adjacent to settlements.

4.27 In such instances, it is expected that planning applications should be accompanied by information to justify the requirement for the specialist accommodation. Assessments should be fully justified and should:

- Identify the catchment for the facility proposed (generally settlement-wide);
- Identify the current need from within the catchment based upon a recognised national toolkit; and
- Identify the current supply of existing care places and any planned provision.

4.28 Housing for older people can be integrated into major residential development to create mixed and balanced communities. Policy CN4 therefore requires proposals for new residential developments exceeding 200 dwellings to consider whether there is an unmet need in the local area, and if so, whether their site would be suitable for specialist housing. It is expected that such applications should be based upon a robust assessment of demand and supply, using a recognised national toolkit.

4.29 If the council accepts that specialist housing would not or could not be provided, the needs of older people should be specifically considered within the mainstream housing including through the provision of desirable accommodation for older people.
5. Self-build and custom housebuilding

5.1. Introduction

5.1 Self-build and custom housebuilding offers the opportunity for residents to be involved in the design and construction of their own homes. The benefits include increasing the supply of housing, enabling more people to get onto the property ladder (through the delivery of lower cost housing), enabling a range of smaller developers into the local housebuilding market and providing a greater mix and variety of homes.

5.2 The purpose of this section of the Supplementary Planning Document is to guide planning decisions made by the council for self-build and custom build homes. It explains the planning mechanisms by which they will be delivered and clarifies the council’s expectations in relation to size, type and build-route.

5.1.1. What is self-build and custom housebuilding?

5.3 Self-build and custom housebuilding is when the purchaser acquires a plot and funds their own build. This early acquisition gives them scope to influence the design and build of their home, either on their own or working with others.

5.4 The Self-Build and Custom Housebuilding Act 2015 (as amended by the Housing and Planning Act 2016) defines self-build and custom housebuilding as:

‘...the building or completion by –
(a) individuals,
(b) associations of individuals, or
(c) persons working with or for individuals or associations of individuals, of houses to be occupied as homes by those individuals.

But it does not include the building of a house on a plot acquired from a person who builds the house wholly or mainly to plans or specifications decided or offered by that person.’

5.5 The Act does not distinguish between self-build and custom housebuilding. The differences have been summarised by Brandon Lewis, the then Minister of Housing and Planning, who stated that ‘[the] definition of ‘self-build’ covers someone who directly organises the design and construction of their new home, while ‘custom build’ covers someone who commissions a specialist developer to help to deliver their own home’.

5.6 Government guidance states that, ‘In considering whether a home is a self-build or custom build home, relevant authorities must be satisfied that the initial owner of the home will have primary input into its final design and layout.’ The council does not consider that speculative market housing delivered by a developer, off-plan sales, or

26 Brandon Lewis, 24 October 2014
https://publications.parliament.uk/pa/cm201415/cmhansrd/cm141024/debtext/141024-0001.htm#14102456000174 (Column 1181)

27 National Planning Practice Guidance Reference ID: 57-016-20170728
circumstances where developers give clients limited fit-out choices comply with the legislation and accompanying Government guidance.

5.2. Planning policy and legislative context

5.7. The National Planning Policy Framework makes specific reference to self-build and custom housebuilding and highlights the need to deliver a wide choice of homes including planning for ‘… the needs of different groups in the community such as people wishing to build their own homes’.28

5.8. Local Plan Policy CN3 (Housing Mix for Market Housing) requires development to provide ‘a range of house type… to address local requirements’. The footnote explains that this includes provision ‘for those wishing to build their own home’.

5.9. Local Plan policies SS3.9-12 specifically require the council’s four largest housing-led development sites (at Manydown, East of Basingstoke, Hounsome Fields and Basingstoke Golf Club) to deliver ‘a proportion of self-build units’. The council considers the reference to ‘self-build units’ under this policy to mean self-build and custom housebuilding as defined in the Self-Build and Custom Housebuilding Act 2015 (as amended by the Housing and Planning Act 2016). The adopted Development Brief Supplementary Planning Documents for the sites at Manydown and East of Basingstoke require 5% of the homes on these sites to be self-build and custom build.

5.10. One of the greatest barriers to creating an individual home is the availability of land. The Housing and Planning Act 2016 therefore introduced a ‘Right to Build’ which requires that all ‘relevant authorities’ in England (such as Basingstoke and Deane Borough Council) have a legal duty to keep a register of individuals and associations of individuals who are seeking to acquire serviced plots of land in the authority’s area and to have regard to that register when carrying out their planning, housing, land disposal and regeneration functions. The legislation imposes a duty upon the council to grant sufficient ‘development permissions’ to meet the demand for self-build and custom housebuilding in their area on a rolling three-year basis.

5.11. In accordance with this requirement, the council established a self-build register in March 2016, where individuals could register an interest in finding a plot for self-build or custom build housing in the borough. The register collects information on the types, sizes and locations of the plots sought, and the individual circumstances of prospective builders.

5.12. In 2017, in line with the Self-build and Custom Housebuilding Regulations 2016, the council introduced a local connection test to ensure that the register provided a reflection of the level of demand generated from people living within the borough or with a connection to it.

5.13. The council’s Self-Build Register shows a strong demand for self-build in Basingstoke and Deane, with 197 individuals joining the register in the last 18 months. Further information about how to join the council’s Register can be found online at www.basingstoke.gov.uk/selfbuild. The council will publish information about the

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supply and demand for plots on an annual basis through the Authority Monitoring Report.

5.14 It is recognised that the self-build register does not necessarily provide a full picture about demand for self-build and custom housebuilding in the borough. Government guidance suggests that there may be other information sources that can contribute to a ‘robust assessment’ of demand 29.

5.2.1. CIL exemption

5.15 The Community Infrastructure Levy (CIL) is a charge per square metre levied on new development (such as new homes) to fund infrastructure. Basingstoke and Deane Borough Council introduced the levy in June 2018. The CIL Regulations 2010 (as amended 2014) currently exempt self-build and custom build homes from paying the charge.

5.16 For CIL exemption purposes, the CIL Regulations define self-build housing as follows; ‘Housing built or commissioned by a person and occupied by that person as their sole or main residence for the duration of the clawback period (3 years)’. Qualifying developments must be genuinely self-build or custom build in line with the guidance in Section 5.1.1 of this SPD.

5.17 Self-build or custom build developments will be able to receive exemption from CIL by declaring their intention to be self-build prior to the commencement of development. On larger developments, Government guidance 30 therefore suggests that each plot should be identified as a separate phase so that the individual purchasers can then apply for CIL exemption themselves. This will prevent a charge being triggered for all plots within the wider development as soon as development commences on the first dwelling.

5.18 The self-builder must then remain as the occupant of the dwelling for a minimum of three years after completion. Any breach will result in the removal of the exemption and the self-builder or custom-builder having to pay CIL retrospectively.

29 Planning Practice Guidance Reference ID: 02a-021-20160401
30 National Planning Practice Guidance Reference ID: 25-144-20140612
5.3. How will self-build and custom build homes be delivered?

**Principle 5.1 Plots for self-build and custom housebuilding**

- Where development is acceptable in all other respects, the delivery of self-build and custom build homes (including plots for such homes) will be supported.

5.19 The council’s strategy to meet its duties in relation to the Right to Build is principally focused upon the delivery of serviced plots on large housing development sites and in existing urban areas (within the defined Settlement Policy Boundaries). It is expected that plots will come forward in the following ways:

- Serviced plots\(^{31}\) on allocated housing sites and as part of other large housing developments (see Section 5.4).

- Proposals for self-build and custom housebuilding initiated by developers (self-build windfall sites), including single plots brought forward by individuals.

- Site allocations in future local plans and neighbourhood development plans.

- On rural exception sites.
  New market housing may be permitted in the countryside in exceptional circumstances where it can be demonstrated that it is required to make affordable housing viable (in accordance with Local Plan Policy CN2). In such circumstances, plots for self-build and custom housebuilding may be prioritised over conventional market housing where a specific need has been identified.

5.20 It is recognised that there are many different build routes for the delivery of self-build and custom-build homes. The council will apply the requirements of this SPD pragmatically to facilitate their delivery.

\(^{31}\) A ‘serviced plot’ is defined in the National Planning Policy Guidance (Reference ID: 57-026-20170728) and also included in this document’s glossary.
5.4. Self-build and custom housebuilding as part of large housing sites

**Principle 5.2 Delivering plots on large housing sites**

- Serviced plots for self-build and custom housebuilding should be made available as part of the mix of dwellings on large housing sites where they would address a local requirement.

5.21 In accordance with the duty imposed by the legislation and Local Plan Policy CN3, the council will seek the provision of serviced plots for self-build and custom housebuilding on conventional market housing sites where they would address local requirements.

5.22 Consistent with the Right to Build, ‘local requirements’ is taken to mean demand across the whole borough, as may be shown by the council’s self-build register or any other evidence.

5.23 Although the council encourages the provision of self-build plots on small and large sites consistent with Policy CN3, given that the council’s strategy to meet its duties in relation to the Right to Build is principally focused upon the delivery of serviced plots on large housing development sites, it will only seek self-build plots on developments of 100 dwellings or more.

5.24 Based upon current trends of demand, in order to meet the requirements of the Right to Build, the council has an aspiration to deliver at least 5% of units on sites where it is justified by the level of local requirements, subject to site-specific negotiations, and taking into account the nature of the development. Justification for this approach is set out in Appendix 5.1. This is based upon current levels of demand and forecasted supply and demand, and the council will keep this requirement under review.

5.4.1. Timing of delivery

**Principle 5.3 Timing of delivery of plots on large sites**

Where plots for self-build and custom housebuilding are required on large housing sites (in accordance with Principle 5.2) or as another requirement of planning policy:

- Serviced plots shall be made available for the construction of self-build and custom build homes before or ‘in step’ with the delivery of the conventional dwellings approved as part of the same planning application.

5.25 The council’s self-build register shows that there is a strong and growing demand for self-build and custom-build accommodation, and that there is a need to deliver plots quickly. Where plots are secured as part of larger developments (in accordance with Principle 5.2), the council will require the serviced plots to be made available before or ‘in step’ with the delivery of the conventional dwellings.

5.26 To ensure this demand is met in a timely manner, the first serviced plots should be made available for marketing prior to the occupation of 50% of the total dwellings. On
sites larger than 400 units, the plots should be marketed prior to the occupation of the 200th dwelling, subject to the proposed phasing and site-specific negotiations.

5.27 In determining the precise timing, the council will take reasonable account of the location of the plots within the site and the phasing of surrounding development. Where the phasing of delivery is delayed, there would need to be compelling evidence that the plots could not be brought forward at an earlier date in an alternative location that would be acceptable to the council.

5.4.2. Marketing self-build plots

**Principle 5.4 Marketing the plots on large sites**

Where plots for self-build and custom housebuilding are required on large housing sites (in accordance with Principle 5.2) or as another requirement of planning policy:

- Plots will be expected to be marketed for a minimum period of 12 months.
- To meet the level of local demand, developers should ensure that the marketing and sale of plots is prioritised to individuals and associations of individuals who have a local connection to the borough and are on Part 1 of the council’s self-build register32.
- The plots should be marketed in a manner that brings them to the attention of the maximum number of potential purchasers at a fair open market value.

5.28 The self-build register provides evidence that there is strong local demand for plots. In order to meet this local demand, the marketing and sale of plots should be prioritised to local individuals and associations of individuals on the self-build register with a local connection to the borough.

5.29 In order to achieve this, the council would usually expect the developer to follow the following process:

- When the plots are ready for marketing, the developer should notify the council;
- The council will contact individuals and associations on Part 1 of the council’s self-build register with details of the plots and how they can be acquired33;
- Prospective custom-builders and self-builders that can provide evidence that they are in a position to proceed with the purchase will be invited to submit a notice of interest to the developer indicating that they wish to purchase a plot within two months of the date that the developer has notified the council of the plots’ availability.
- In the event that the developer has not received a notice of interest for all the plots, or if any person who serves a notice of interest fails to complete the purchase and transfer of the plot within four months of providing such notice of interest, then such plots can be marketed for self-build on the open market.

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32 Following the Self-Build and Custom Housebuilding Regulations 2016, the Council has divided the Register into: Part 1 - Those individuals that joined the Register before the Regulations came into force and those with a local connection to the borough; and Part 2 - Those individuals without a local connection to the borough.

33 As suggested by National Planning Practice Guidance Reference ID: 57-028-20170728
5.30 Plots should not be marketed until a design code has been submitted to and agreed by the Local Planning Authority. This will ensure that the self-builder understands the parameters for the development of their plot at the outset. Although plots do not need to be serviced at the time of marketing, the plot should be sold with clear timescales for when services will become connected.

5.31 Plots should be marketed for no less than 12 months in total (unless they are sold prior to this time). Marketing should be undertaken in accordance with the principles set out in the council’s Marketing Guidance Note\(^{34}\) to ensure the market is properly tested at a fair open market value. The marketing particulars should include a Design Code approved by the council setting out clear expectations about what can be delivered on that plot (or a plain English summary of the requirements, sometimes known as a Plot Passport).

5.32 Where the plots have been appropriately marketed but not sold within this time period (and this has been agreed with the Local Planning Authority), these plots may be built out as conventional market housing by the developer.

5.5. Planning process for delivering self-build and custom build homes

5.33 This section provides guidance on how plots for self-build and custom housebuilding can be delivered through the planning system in a timely and efficient manner. It principally focuses upon the delivery of plots as part of large housing developments (as required by Principle 5.2), however many of the principles are relevant to all types of planning application that include self-build or custom build homes.

5.34 The process of delivering self-build and custom build plots where they are required as part of large housing sites is summarised by the flow chart in Appendix 5.2.

5.35 As the exact design of the self-build and custom build homes will not be known until the plots have been purchased by the self or custom builder, developments including one or more self-build dwellings will often be submitted in ‘outline’. An outline consent establishes the principle of development but allows more detailed matters such as the layout of plots and the appearance of the homes to be determined at a later date. Where the plots are a requirement of planning policy, the council would use a legal agreement to secure the number and mix of plots, and the timing of their delivery. If there is insufficient detail provided about the location or deliverability of the plots, the council may also require the submission of a delivery strategy by condition (see Principle 5.5, below).

5.36 Developers may submit hybrid planning applications\(^{35}\), which provide additional detail about the self-build and custom build units. These may include detail about the siting of the plots, their scale, and how they will be accessed (with other matters such as the

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\(^{34}\) Available to view on the Council’s website: [https://www.basingstoke.gov.uk/content/page/49766/Marketing%20guidance%20note%202017.pdf](https://www.basingstoke.gov.uk/content/page/49766/Marketing%20guidance%20note%202017.pdf)

\(^{35}\) Hybrid planning applications are those that are partly submitted in outline, with some elements of the proposal in greater detail.
homes’ appearance reserved for later determination) or full details of the plots (if accompanied by a sufficiently detailed design code, see below). Hybrid planning applications that provide additional detail about the self-build and custom-build units are strongly encouraged by the council, as they allow details of the provision to be fixed at an earlier stage, and may allow for quicker delivery.

5.37 The detail of individual dwellings may be determined in the following ways:

a. The submission of a single planning application with a detailed design code to control the appearance of all the self-build and custom build plots.
   If the design code is sufficiently detailed, this could be approved in lieu of the homes’ specific designs (see Principle 5.6a). The council would then impose a condition requiring the appearance of the homes (and any other outstanding reserved matters) to accord with the design code. The council would then check the home’s compliance with the approved code without the need for separate reserved matters planning applications for each plot. Or;

b. Submission of individual reserved matters applications for each dwelling.
   Individual self or custom builders would submit their own reserved matters applications for the design and appearance of their dwelling in accordance with the parameters established in a high-level design code (see Principle 5.6b). These planning applications would be determined against the council’s planning policies.

5.38 The design code has different information requirements depending upon its purpose. Further detail about what information should be provided as part of the design code is set out in Principles 5.6 a and b (below).

5.39 On the largest sites (where more than 100 self-build or custom build homes are proposed in one area), and where the design code is sufficiently detailed, the council may consider adopting a Local Development Order (LDO) to enable development that complies with the design code to proceed without the need for further submissions. This would be considered on a case-by-case basis.

5.40 The council will usually require full planning applications, providing full details of all new homes, to be submitted in conservation areas. However, the council will exceptionally allow planning applications for self-build and custom-build dwellings to be submitted in outline, provided a design code is submitted with the planning application with sufficient detail to provide confidence that an acceptable scheme can be achieved.
5.5.1. Delivery strategy

<table>
<thead>
<tr>
<th>Principle 5.5  Self-build delivery strategy</th>
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</thead>
<tbody>
<tr>
<td>• Where planning policies require self-build or custom-build homes to be provided as part of a development that includes conventional housing (as per Principle 5.2), and the relevant information has not been agreed through the planning process, prior to the submission of any reserved matters applications (including those for conventional housing), a Self Build Delivery Strategy should be submitted to and approved by the council. This will set out:</td>
</tr>
<tr>
<td>o The location of the plots;</td>
</tr>
<tr>
<td>o Details about how the plots will be accessed and serviced; and</td>
</tr>
<tr>
<td>o Plot phasing in relationship to the surrounding development.</td>
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<tr>
<td>• Illustrative layout information should be provided to show how a mix of units that comply with Principle 5.7 (Providing a mix of sizes and types) could be accommodated within the area identified for plots.</td>
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</table>

5.41 Where the necessary information has not been agreed through planning applications, the council will require a self-build delivery strategy to demonstrate where and how the plots for self-build and custom housebuilding will be delivered, and to provide reassurances about their delivery and how they will fit within the wider development.

5.42 Self-build and custom build housing will by its very nature be more diverse than conventional market housing so it is important for applicants and the council to carefully consider how this form of housing is integrated into a scheme. The self-build and custom build housing on a scheme should be arranged in a series of parcels clustered in an allocated hub or area within a larger site. This would ensure that the design character and wider housing offer across the site is not compromised. ‘Pepper potting’ should be avoided. Arranging self-build and custom-build housing in clusters will also enable construction traffic and different build outs to be more easily managed.

5.43 As the location of the plots may impact upon the wider masterplanning of the site, the delivery strategy should be submitted prior to the submission of any reserved matters applications for conventional housing within the area covered by the outline consent. Early discussion with the council about the location of the custom and self-build parcels is strongly encouraged.
5.5.2. Design code

<table>
<thead>
<tr>
<th>Principle 5.6 Design Codes</th>
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<tbody>
<tr>
<td>On all sites where more than one self-build or custom build home is proposed, a design code should be submitted to and approved by the Local Planning Authority. In order to streamline the planning application process, options for the level of detail that could be included in the design code are set out in Principles 5.6a and 5.6b.</td>
</tr>
</tbody>
</table>

5.44 A key benefit of self-build and custom-build housing is the opportunity to bring forward a development with a mixed and varied character and appearance. A design code can ensure that development is high quality with linking elements which provide visual continuity such as public realm and landscaping, without fettering the ability to innovate and customise. It can also provide certainty to prospective purchasers about what would be acceptable on each plot.

5.45 As set out in Section 5.5, a design code may either be prepared as part of a full or reserved matters planning application or to guide future reserved matters. These different purposes result in different requirements for the document, as explained further below.

5.46 The design code should be prepared and agreed prior to the plots being marketed (Principle 5.4) to provide potential purchasers with sufficient certainty about what could be built.

a. Design code approved with reserved matters

<table>
<thead>
<tr>
<th>Principle 5.6a Design code approved with planning application</th>
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<tbody>
<tr>
<td>- Where the council considers that the site is not in a sensitive location, prior to the marketing of any plots, the plot provider may choose to submit and have approved a detailed design code as part of a reserved matters planning application.</td>
</tr>
<tr>
<td>- The final design of each dwelling would then be assessed for compliance with this code as part of a planning condition.</td>
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<tr>
<td>- The design code should clearly establish design parameters for each plot with illustrative design drawings and sufficient detail to satisfy the council that the development would be high quality and meet the requirements of the council’s planning policies.</td>
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<tr>
<td>- The design code should include the following details for each dwelling (as a minimum):</td>
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<tr>
<td>o Siting of the plot;</td>
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<tr>
<td>o Building type and maximum number of bedrooms (for example, a 3 bed semi-detached house);</td>
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</tbody>
</table>
- A plan showing the maximum building footprint including building line;
- Maximum and minimum height;
- Maximum number of storeys;
- Principal means of access and orientation of front elevation;
- Roof shape;
- Materials;
- Front boundary treatment;
- Any limitations to prevent overlooking;
- Parking requirement;
- Proposed water use and sustainability standards; and
- Waste facilities.

- The content of the design code should have regard to the existing or the proposed character of the surrounding area.

5.47 The approval of a design code in this manner can avoid the need for multiple small reserved matters planning applications and help to streamline the delivery of self-build and custom build dwellings. However, in order to ensure high quality design, it will be necessary for the design code to include a suitable level of detail about the type and form of development on each plot. In some circumstances, the code may include options where multiple approaches would be acceptable.

5.48 The design code would be conditioned as part of the planning permission. The self or custom builder would then discharge the condition by submitting details of their own home to the council. These should include a site plan, full elevational plans and a complete set of floorplans. The council would then discharge the design against the conditioned code.

5.49 Given the flexibility that this allows, the council does not consider that this approach would be appropriate in sensitive locations, for example where the site is: within or adjacent to a conservation area; within the setting of a listed building; or in the North Wessex Downs Area of Outstanding Natural Beauty. The suitability of this approach should therefore be discussed with the council at the earliest opportunity.
b. Design code setting a framework for reserved matters

**Principle 5.6b Design code to set a framework for future reserved matters**

- Where more than one self-build or custom build home is proposed, prior to marketing any of the plots or the submission of any reserved matters applications, the plot provider may choose to submit and have approved by the council a design code to set a framework for determining individual reserved matters planning applications.

- The level of detail required in the design code should be proportionate but should include the following details (as a minimum):
  - Building type and maximum number of bedrooms (for example, a 3 bed semi-detached house);
  - A plan showing the maximum building footprint including building line;
  - Maximum and minimum height;
  - Maximum number of storeys;
  - Front boundary treatment;
  - Parking requirement; and
  - Waste facilities.

- Where the site is in a sensitive location, the council may seek further detail including details of the roof slope and materials.

- The content of the design code should have regard to the existing or the proposed character of the surrounding area.

5.50 The purpose of the design code is to manage the quality of the development, to provide a degree of continuity between the plots, and to provide a degree of certainty about what could be built on the plot by the potential purchaser. It will not be necessary for the design code to be as detailed as that required by Principle 5.6a, as detailed compliance with the council’s planning policies can be secured through subsequent reserved matters planning applications. The level of detail should be proportionate to the size of the development, the sensitivity of the site, and the nature of development proposed.

5.51 The council is keen to encourage innovation and will allow flexibility to exceptionally approve schemes where their external appearance does not comply with the approved design code, where a justification is provided that the proposal would be in keeping with or enhance the character of the surrounding area and would be acceptable in all other respects.
5.6. A mix of sizes and types

**Principle 5.7 Providing a mix of sizes and types**

- The custom and self-build element of a development should meet the mix requirements of Local Plan Policy CN3 (Housing Mix for Market Housing), and take account of the preferred type, size and build-route identified by the council’s self-build register.

5.52 The council wishes to make custom and self-building available to people with different incomes and different space requirements to create opportunities for all, and mixed and balanced communities. Although it is recognised that there is no legislative requirement for self-build and custom build housing to match people’s needs, proposals should respond to the wider housing needs of the borough, and take account of the type (detached, semi-detached etc.), and size (no of bedrooms) of properties which people on the register are seeking to build.

5.53 Although the Regulations do not distinguish between custom and self-build properties, the developments should reflect the build routes that are identified as being in demand on the council’s self-build register. This currently shows that a mix of self-build and custom-build homes are demanded.

5.54 Information from the register will be published in the Authority Monitoring Report annually.

5.7. Self-build and custom build affordable housing

5.55 Schemes that include self-build and custom build housing will be required to deliver affordable housing in line with Local Plan Policy CN1 (and the advice in Section 2 of this SPD).

5.56 Self-build and custom build housing may also satisfy the affordable housing obligation itself (where provision complies with the definition in national policy). This will be accepted at the council’s discretion where it meets a local requirement, and meets the other requirements of council policy.
Appendices

Appendix 1. Glossary

**Conventional housing:** Used in the context of self-build and custom housebuilding, this is housing that is not delivered via a self-build or custom build route.

**Designated rural area:** Such rural areas as described under section 157(1) of the Housing Act 1985. Within the borough, this comprises the Area of Outstanding Natural Beauty. The designated rural area within Basingstoke and Deane is shown on the policies maps.

**Design code:** A set of illustrated design rules and requirements which instruct and may advise on the physical development of a site or area.

**Gross floorspace:** In relation to policy CN1, this refers to the gross internal area (GIA) in square metres of the new dwelling(s) and should include circulation and service space such as lifts and floorspace devoted to corridors, toilets, storage, and ancillary floorspace. Best practice for measuring GIA is set out within RICS: Code of Measuring Practice 6th Edition (2007).

**Local Development Order (LDO):** An order that can be made by a local planning authority to give a grant of planning permission to specific types of development within a defined area. These streamline the planning process by removing the need for developers to make a planning application to a local planning authority.

**Outline planning application:** An application for outline planning permission allows for a decision on the general principles of how a site can be developed. Outline planning permission is granted subject to conditions requiring the subsequent approval of one or more ‘reserved matters’.

**Plot passport:** A plot passport is a simple and succinct summary of the design parameters for a given plot. Although they are not a formal document, they add value by acting as a key reference point for the purchaser, capturing relevant information from the planning permission, design constraints and procedural requirements in an easily understandable and readily accessible format.

**Registered providers:** Formerly known as Registered Social Landlords Registered Providers are registered with, and regulated by, the Homes England as ‘for profit’ or ‘not for profit’ bodies.

**Reserved matters planning application:** These are those aspects of a proposed development which an applicant can choose not to detail with an outline planning application (i.e. they can be ‘reserved’ for later determination).

**Rural exception site:** A site outside the defined settlement limits that is exceptionally permitted to meet an affordable housing need.

**Self-build register:** A register hosted by Basingstoke and Deane Borough Council where individuals can register their interest in acquiring a plot for their own Self-Build or Custom Housebuilding project

**Serviced plot of land:** A serviced plot of land is a plot of land that either has access to a public highway and has connections for electricity, water and waste water, or, in the opinion
of a relevant authority, can be provided with access to those things within the duration of a development permission granted in relation to that land.

Access to a public highway can include sections of private or unadopted road, it does not mean that the plot has to be immediately adjacent to the public highway just that there is the guaranteed right of access to the public highway.

Connections for electricity, water and waste water means that the services must either be provided to the boundary of the plot so that connections can be made as appropriate during construction or adequate alternative arrangements must be possible such as the use of a cesspit rather than mains drainage.

For example a plot of land alongside an existing public highway that is an infill between existing dwellings would count as being serviced. There is no expectation that services must be physically connected to the plot at the time of granting planning permission.

Supplementary Planning Document (SPD): A planning policy document produced by the council to provide greater detail on policies within the Local Plan to support decisions on planning applications.
Appendix 2.1. NPPF definition of affordable housing

**Affordable housing:** Social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market. Eligibility is determined with regard to local incomes and local house prices. Affordable housing should include provisions to remain at an affordable price for future eligible households or for the subsidy to be recycled for alternative affordable housing provision.

Social rented housing is owned by local authorities and private registered providers (as defined in section 80 of the Housing and Regeneration Act 2008), for which guideline target rents are determined through the national rent regime. It may also be owned by other persons and provided under equivalent rental arrangements to the above, as agreed with the local authority or with the Homes and Communities Agency.

Affordable rented housing is let by local authorities or private registered providers of social housing to households who are eligible for social rented housing.

Affordable Rent is subject to rent controls that require a rent of no more than 80% of the local market rent (including service charges, where applicable).

Intermediate housing is homes for sale and rent provided at a cost above social rent, but below market levels subject to the criteria in the Affordable Housing definition above. These can include shared equity (shared ownership and equity loans), other low cost homes for sale and intermediate rent, but not affordable rented housing.

Homes that do not meet the above definition of affordable housing, such as “low cost market” housing, may not be considered as affordable housing for planning purposes.

Source: NPPF (2012)
Appendix 2.2. AONB Area

Figure 2.1 The extent of the Area of Outstanding Natural Beauty, where a differential affordable housing threshold applies.
Appendix 2.3. Vacant building credit

National policy\textsuperscript{36} seeks to encourage brownfield development through the vacant building credit which allows existing vacant floorspace to be offset against some of the affordable housing requirement. Where a vacant building is brought back into lawful use or is demolished to be replaced by a new building, the developer is offered a financial credit against the affordable housing contribution equivalent to the existing gross floorspace of the vacant buildings.

The Vacant Building Credit does not apply to abandoned buildings\textsuperscript{37} so to assist with determining if a building is vacant or abandoned, the council’s definition of vacant is aligned with the vacancy test in Regulation 40 of the Community Infrastructure Levy (Amendment) Regulations 2014. This requires buildings to have been occupied for six months in the three years preceding the submission of the planning application.

The council will not apply the Vacant Building Credit where it considers a building has been made vacant for the sole purpose of redevelopment.

In order to calculate the credit, the applicant will need to submit plans for the existing and proposed floorspace and accurate floorspace figures in square metres.

The vacant building credit should be taken into account in informing the viability of development. It should not provide a further reduction in contributions after viability has been taken into account.

Example:

Based upon a 12 dwelling development on a site with vacant buildings of 200sqm gross floorspace.

1. Proposed gross floorspace = 800sqm
2. Existing gross floorspace = 200sqm (25% of proposed gross floorspace)
3. Vacant Building Credit = 25% reduction in affordable housing contribution
4. Usual affordable housing contribution = 4.8 dwellings – rounded to 5 dwellings (40% of 12 dwellings)
5. Contribution with 25% Vacant Building Credit = 4.8 dwellings – (4.8 dwellings x 25%) = 3.6 dwellings
6. On-site affordable housing contribution = 4 dwellings.

\textsuperscript{36} National Planning Practice Guidance Reference ID: 23b-021-20160519
\textsuperscript{37} National Planning Practice Guidance Reference ID: 23b-023-20160519
Appendix 2.4. Information required to assess development viability and to calculate financial contributions

Any development appraisal submitted to the council must take relevant national guidance into account and include at least the following information to enable it to be assessed by a RICS valuer:

Site background:
- Statement outlining whether the site has been acquired, or is on an option; and
- The suggested Land Value Benchmark which in most instances will be the existing use value unless exceptional circumstances justify using an alternative use value.

Revenues:
- Open market sales values – supported by a report setting out expected selling prices and comparables used;
- Estimates of affordable housing value based on anticipated receipt from a Registered Provider; and
- Any other potential revenues. For example ground rents, and the capital value of any non-residential element.

Costs:
- Open market and affordable housing build costs (based on BCIS)
- Other development costs including building contingencies, professional fees (expressed as % build costs), finance, marketing and legal fees.
- Abnormal development costs (supported by a specialist’s report);
- Planning contributions including those to be secured under Section 106. Where physical infrastructure is to be provided, it should be costed using an estimate from a quantity surveyor;
- Developer’s return; and
- Any other relevant considerations such as non-saleable area.

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Appendix 3.1. Explanation of housing mix requirements

A3.1 There are a range of factors which influence housing demand. The analysis in this appendix sets out information about the size and structure of the population and household structures and outlines what impact this may have on the sizes of housing required in the future.

Existing housing stock

A3.2 The 2011 census provides information about the mix of dwellings across the borough. 42% of the dwellings are 3-bed and 31% of the dwellings have two bedrooms or fewer.

<table>
<thead>
<tr>
<th>Dwelling size</th>
<th>0 bed</th>
<th>1 bed</th>
<th>2 bed</th>
<th>3 bed</th>
<th>4 bed</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>0.2</td>
<td>9.1</td>
<td>22.2</td>
<td>42.6</td>
<td>25.9</td>
</tr>
</tbody>
</table>

*Figure A3.1 Existing mix of homes (Source: Census 2011)*

A3.3 There is considerable variation across the borough, with a tendency for more 2 and 3 bed dwellings in the urban wards, and more 4 bed dwellings in the rural wards.

<table>
<thead>
<tr>
<th>Ward (2011)</th>
<th>Total</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basing</td>
<td>3489</td>
<td>0.1</td>
<td>7.4</td>
<td>20.8</td>
<td>32.4</td>
<td>39.4</td>
</tr>
<tr>
<td>Baughurst and Tadley North</td>
<td>2184</td>
<td>0.0</td>
<td>5.8</td>
<td>15.0</td>
<td>49.2</td>
<td>30.0</td>
</tr>
<tr>
<td>Brighton Hill North</td>
<td>2154</td>
<td>0.2</td>
<td>11.0</td>
<td>20.6</td>
<td>57.8</td>
<td>10.4</td>
</tr>
<tr>
<td>Brighton Hill South</td>
<td>2310</td>
<td>0.5</td>
<td>14.2</td>
<td>24.2</td>
<td>54.5</td>
<td>6.7</td>
</tr>
<tr>
<td>Brookvale and Kings Furlong</td>
<td>2927</td>
<td>0.2</td>
<td>14.7</td>
<td>33.1</td>
<td>44.2</td>
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</tr>
<tr>
<td>Buckskin</td>
<td>2638</td>
<td>0.5</td>
<td>7.5</td>
<td>20.5</td>
<td>50.0</td>
<td>21.6</td>
</tr>
<tr>
<td>Chineham</td>
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<td>29.5</td>
<td>31.6</td>
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<tr>
<td>Eastrop</td>
<td>2637</td>
<td>1.0</td>
<td>24.0</td>
<td>37.0</td>
<td>27.5</td>
<td>10.6</td>
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<td>Grove</td>
<td>2542</td>
<td>0.1</td>
<td>14.0</td>
<td>17.6</td>
<td>43.0</td>
<td>25.2</td>
</tr>
<tr>
<td>Hatch Warren and Beggarwood</td>
<td>3377</td>
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<td>5.3</td>
<td>18.3</td>
<td>28.5</td>
<td>47.9</td>
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<tr>
<td>Norden</td>
<td>3606</td>
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<td>11.0</td>
<td>26.5</td>
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<td>15.2</td>
<td>61.7</td>
<td>11.0</td>
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<td>Popley West</td>
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<td>Rookdown</td>
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<td>South Ham</td>
<td>4009</td>
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<td>10.9</td>
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<td>48.0</td>
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<tr>
<td>Tadley Central</td>
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<tr>
<td>Tadley South</td>
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<td>8.4</td>
<td>20.4</td>
<td>45.8</td>
<td>25.3</td>
</tr>
<tr>
<td>Winklebury</td>
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<td>16.7</td>
<td>61.3</td>
<td>15.5</td>
</tr>
<tr>
<td><strong>Basingstoke, Basing and Tadley</strong></td>
<td><strong>50487</strong></td>
<td><strong>0.3</strong></td>
<td><strong>10.2</strong></td>
<td><strong>23.4</strong></td>
<td><strong>44.4</strong></td>
<td><strong>21.7</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Parish</th>
<th>Total</th>
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<th>1</th>
<th>2</th>
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<th>4+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bramley and Sherfield</td>
<td>2367</td>
<td>0.0</td>
<td>6.4</td>
<td>21.0</td>
<td>36.0</td>
<td>36.6</td>
</tr>
<tr>
<td>Burghclere, Highclere and St Mary Bourne</td>
<td>2246</td>
<td>0.0</td>
<td>2.4</td>
<td>17.5</td>
<td>37.5</td>
<td>42.5</td>
</tr>
<tr>
<td>East Woodhay</td>
<td>1092</td>
<td>0.1</td>
<td>2.6</td>
<td>13.8</td>
<td>32.4</td>
<td>51.1</td>
</tr>
<tr>
<td>Location</td>
<td>Population</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4+</td>
<td>%</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>------------</td>
<td>----</td>
<td>----</td>
<td>----</td>
<td>-----</td>
<td>----</td>
</tr>
<tr>
<td>Kingsclere</td>
<td>2123</td>
<td>0.1</td>
<td>9.1</td>
<td>20.2</td>
<td>38.9</td>
<td>31.7</td>
</tr>
<tr>
<td>Oakley and North Waltham</td>
<td>2735</td>
<td>0.0</td>
<td>5.7</td>
<td>11.7</td>
<td>41.8</td>
<td>40.8</td>
</tr>
<tr>
<td>Overton, Laverstoke and Steventon</td>
<td>2107</td>
<td>0.0</td>
<td>6.7</td>
<td>25.9</td>
<td>41.1</td>
<td>26.2</td>
</tr>
<tr>
<td>Pamber and Silchester</td>
<td>1835</td>
<td>0.2</td>
<td>3.5</td>
<td>15.7</td>
<td>38.4</td>
<td>42.1</td>
</tr>
<tr>
<td>Sherborne St John</td>
<td>929</td>
<td>0.0</td>
<td>4.5</td>
<td>20.3</td>
<td>33.5</td>
<td>41.7</td>
</tr>
<tr>
<td>Upton Grey and The Candovers</td>
<td>1153</td>
<td>0.1</td>
<td>4.2</td>
<td>19.5</td>
<td>32.4</td>
<td>43.8</td>
</tr>
<tr>
<td>Whitchurch</td>
<td>2241</td>
<td>0.1</td>
<td>10.8</td>
<td>25.3</td>
<td>37.8</td>
<td>26.0</td>
</tr>
<tr>
<td>Rural Wards</td>
<td>18828</td>
<td>0.1</td>
<td>6.0</td>
<td>19.1</td>
<td>37.8</td>
<td>37.0</td>
</tr>
</tbody>
</table>

Figure A3.2  Mix of homes by ward/parish: Percentage by number of bedrooms (Source: Census, 2011)

(Cells in green highlight provision >40%)

Recent housing delivery

A3.4 In the period 2011-2017, housing delivery was relatively evenly spread across different unit sizes. The data includes a large number of 1 and 2 bedroom units arising from completions of office to residential conversions in 2015/16.

<table>
<thead>
<tr>
<th>2011/12-2015/6</th>
<th>Nos</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>429</td>
<td>18%</td>
</tr>
<tr>
<td>2</td>
<td>753</td>
<td>32%</td>
</tr>
<tr>
<td>3</td>
<td>622</td>
<td>27%</td>
</tr>
<tr>
<td>4+</td>
<td>540</td>
<td>23%</td>
</tr>
</tbody>
</table>

Figure A3.3  Size mix of recently completed market dwellings (Source, BDBC AMR)

Forecast changes to the structure of the population

A3.5 As shown in Figure A3.1 below, the majority of household growth over the Plan period is expected to come from households with a representative aged 65 and over. This data incorporates all the assumptions that are within the 2014-based SNPP including births, deaths, migration and the household representative rates.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Household growth 2011-2029(^{39})</th>
<th>Household population growth 2011-2029(^{40})</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aged 15-34</td>
<td>-1,716</td>
<td>74</td>
</tr>
<tr>
<td>Aged 35-54</td>
<td>1,735</td>
<td>-766</td>
</tr>
<tr>
<td>Aged 55-64</td>
<td>2,911</td>
<td>5,595</td>
</tr>
<tr>
<td>Aged 65 and over</td>
<td>10,776</td>
<td>16,905</td>
</tr>
<tr>
<td>Total</td>
<td>13,706</td>
<td>25,860</td>
</tr>
</tbody>
</table>

Figure A3.4  Growth in households over the Plan Period (Source: 2014-based Household projections)

A3.6 Taking into account the ageing population, the types of households predicted to grow are predominantly smaller households: couples, one person households and households with one child.

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\(^{39}\) Household age based upon age of the household representative (the oldest male in that household).

\(^{40}\) Number of people living in households within that age group (excludes the population living in institutions).
Figure A3.5: Change in households by age and household type (Source: 2014-based household projections) (growth to the right of the central line and decline to the left)

A3.7 If these projected changes in households were translated into housing mix (and no account was made for the tendency for households to under-occupy properties), it would highlight a need for smaller one and two bed properties to accommodate older couples without dependent children and all people living alone, as these households make up more than 80% of the household growth. The increase in households with one dependent child would suggest a need for two and three bedroom properties. The housing requirements of the elderly may range from standard dwellings to more specialist housing options such as bungalows, retirement villages, sheltered housing schemes or care homes.

A3.8 Although the assessment of the household sizes provides a good indication of how the population and household structure will develop, it is recognised that households’ choices of housing will be influenced by many factors. Although there are links between household size and accommodation type, the size of market housing that households occupy has traditionally related more to their wealth and age than the number of people which they contain.

Projecting forward occupation patterns by age

A3.9 According to the 2011 Census, households living in market properties with a reference person aged 16-34 have a different profile to the other age groups, mainly occupying properties with 3 bedrooms or fewer (89.3%) and over half (54.1%) live in properties with 1 or 2 bedrooms. Almost 70% of households aged 65+ live in homes with three or more bedrooms.
Figure A3.6: Bedroom sizes by the age of the household reference person in Basingstoke and Deane (market homes). Source: Census (2011)

A3.10 Projecting forward current occupancy patterns by age group results in a requirement for approximately the following market mix of housing: 3% 1-bed homes; 17% 2-bed homes; 49% 3-bed homes; and 32% 4-bed+ homes. The relatively high proportion of larger homes reflects the tendency of the growing 65+ group to occupy homes of this size.

A3.11 Whilst the output of the modelling provides estimates of the proportion of market homes of different sizes that are needed if trends from the 2011 Census continue, there are a range of factors which should be taken into account in considering an appropriate mix.

Should existing patterns of occupancy be projected forward?

A3.12 The above assessment is based upon net household change, and the assumption that this net growth in households will move into new accommodation as they age. However, although it is logical that some young families will seek larger homes to accommodate their growing needs, there is inertia in the housing market so many households will choose not to downsize later in life.

A3.13 Basingstoke and Deane has a high level of under-occupancy compared to elsewhere in the country and south-east England, and under-occupation is particularly common amongst the older age groups.
A3.14 The particularly high level of under-occupancy in Basingstoke and Deane (as shown in Figure A3.7) may be a consequence of the form of the borough’s urban housing stock (with a large number of family dwellings built in the 1960s), and the larger, more expensive dwellings in the countryside.

A3.15 Projecting forward existing trends would carry forward the existing levels of under-occupancy and may therefore possibly over-estimate the future requirement for larger dwellings.

Would projecting forward the current mix meet future needs?

A3.16 The high occupation of 3 and 4-bed units by households 65+ may be reflective of the inertia in the housing market rather than there necessarily being a strong requirement for this size of accommodation from that age group. This is supported by the findings of the council’s over-55s housing needs survey (2017) which found that 43% of respondents had lived in the same house for more than 20 years, and a further 23% for between 10 and 20 years.

A3.17 Of the respondents, almost 40% indicated that they were looking to move in the next five years, with the following reasons cited as most applicable: current home too large (49%); not suitable for older and disabled people (26%); current home too costly (23%). The majority of respondees were looking to maintain their independence by living in mainstream housing, and of those, 75% indicated they were looking for a property with two bedrooms, and 25% indicated that they were looking for a property with three bedrooms. 95% of respondents indicated they would be looking for a bungalow or a house – there was almost no appetite for flats or maisonettes. Although the sample size of this survey was small, these findings were
broadly similar to a previous older persons' needs study undertaken by the council in 2005 and reflects other national studies.

A3.18 National planning policy recognises the importance of providing opportunities for older people to move to 'more suitable accommodation if they so wish'. The council's survey supports the need to adjust the housing stock through the provision of smaller houses that are attractive to older people and can encourage downsizing.

Who occupies new housing?

A3.19 The above assessment is been based upon the net change in housing required to balance the housing stock. However, recognising the inertia to moving and difficulties in balancing the housing market, it is helpful to take into account the needs of newly forming households and to understand the types of households most likely to occupy new development.

Newly forming households

A3.20 The council’s projections show that the majority of newly forming households will have a household representative under the age of 34.

<table>
<thead>
<tr>
<th>Age group</th>
<th>Household formation</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-34</td>
<td>19,682</td>
</tr>
<tr>
<td>35-54</td>
<td>2,107</td>
</tr>
<tr>
<td>55-64</td>
<td>-1,172</td>
</tr>
<tr>
<td>65 or over</td>
<td>-597</td>
</tr>
</tbody>
</table>

Figure A3.8 Gross new households forming 2011-2026 (Source: Popgroup, PG-10yr-5yr model (HH12))

A3.21 Although some of the needs of these newly forming households will be met from the existing housing stock (as a result of existing households moving), a high proportion of their market needs will be met from new accommodation.

A3.22 As shown in Figure A3.6, this younger age group has a higher propensity to occupy smaller units of accommodation. As market housing becomes less affordable it is likely that newly forming households will occupy the size of housing that they can afford, which is likely to more closely match their needs than their aspirations.

Occupants of new developments

A3.23 A report by Hampshire County Council reviewed development that had taken place between April 2001 and March 2011 and found differences between the occupants of new development and the wider borough. This found that new development had a significantly younger age profile than the population as a whole (median age of 30

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41 Ball and Nanda ‘Household attributes and future demand for retirement housing’, International Journal of Housing Markets and Analysis’ (2013) cites in Designing with Downsizers (University of Sheffield, 2016)
42 National Planning Practice Guidance ID: 2a-021-20160401
43 Source: POPGROUP model run by Edge Analytics for PG-10yr-5yr model (HH12).
years compared to 39 years) and the population structure had a particular
concentrations in the childbearing age groups and pre-school aged children.

![Population structure of new development (in blue and pink) compared to the wider borough. Source: HCC (2014)](image)

A3.24 Whilst it is important to note that the make-up of new development is reflective of the type of homes that are provided, this pattern of occupancy and the needs of newly forming households supports the need for new development to provide a mix of dwellings including smaller family units.

**Affordability**

A3.25 It is also necessary to ensure that the proposed housing would be affordable to a mix of local residents so it is able to meet local needs and create a mixed and sustainable community. It is therefore necessary to ensure that the types of new homes built broadly align with incomes.

A3.26 Although affordability is difficult to model precisely (as there is no official data about how much equity or savings existing residents have), based upon borough-wide CACI and estimated Paycheck data the median household income in the borough could afford a mortgage of £166,300 and an upper quartile income could afford a mortgage of £267,300 (assumed mortgage to household income ratio equal to 4). On top of this mortgage, the household would also need to raise the required deposit. This income compares to overall house prices of £244,000 for a lower quartile property across the borough and £300,000 for a median property (October 2016 to September 2017). Property prices increase with the size of the property and detached properties have a lower quartile sale price of £390,000 and a median sale price of £460,000.

A3.27 The above figures relate to the income of all households, not just those who would be seeking market tenures. However it does illustrate issues around affordability in the local market, and suggests that a range of units would be appropriate. This will
help to ensure that those on lower incomes and/or those that are younger and yet to reach their peak earnings can still access the market

**Supply of smaller units**

A3.28 The conversion of office buildings to residential under permitted development rights has made a significant contribution to the stock of smaller units. Of the 287 units completed at 1 April 2017, 179 had one bedroom, 107 had two bedrooms, and 1 had three bedrooms.

**Conclusion**

A3.29 A mix of homes is necessary to deliver a mixed and sustainable community. Local Plan Policy CN3 (Housing Mix for Market Housing) seeks a range of house type and sizes to address local requirements. This should include a mix of dwelling sizes including smaller dwellings.

A3.30 Projecting forward existing patterns of occupation points towards a high requirement for three bedroom properties and larger. However, there is evidence that the existing pattern of occupation is skewed by the under occupancy of homes by older age groups. It is therefore possible that projecting forward current patterns would overstate the need for larger homes, and fail to address issues of under-occupation and rebalance communities.

A3.31 There is significant inertia in the housing market that prevents existing households moving home to meet their needs. In particular, older households may be occupying large properties that do not best meet their needs. The council wishes to provide opportunities for downsizing, including through the provision of small/medium-sized homes (2 and 3 beds) that are attractive to older people. Such provision could allow the release of equity but still retain the desired flexibility for friends and family to come and stay.

A3.32 Given the inertia in the housing market, new provision should also take particular account of the needs of newly forming households, and the needs of young families that most often occupy new housing estates. These households tend to be younger with a high demand for 3-bed dwellings and a relatively high propensity to occupy 2-bed dwellings.

A3.33 In order to meet local requirements, it is also necessary to ensure the new dwellings are affordable to residents. Analysis shows that only a limited proportion of the population would be able to afford the largest dwellings.

A3.34 There is expected to be a continuing market for family homes, however some of this demand could be met from older households downsizing.

A3.35 Although one-bed properties are most affordable, they provide limited flexibility to changing household circumstances. These units have recently been provided by office conversions under permitted development rights.
A3.36 Based on this evidence, there is a need for development to focus on the provision of two and three-bed properties, with a particular requirement for two bedroom houses. Two and three bed properties should generally comprise at least half of the new dwellings delivered as part of new development (subject to the other considerations of CN3). Although there is a continuing need for family homes, dwellings with four or more dwellings should only be provided as part of a range of dwellings to provide mixed and sustainable communities.
Appendix 5.1. Justification for self-build housing on large housing development sites

A5.1 The Right to Build requires councils to ‘give suitable development permission in respect of enough serviced plots of land to meet for demand for self-build and custom housebuilding in the authority’s area’. The regulations clarify that ‘development permission is ‘suitable’ if it has planning permission (or permission in principle through an allocation) for a development that could include self-build and custom housebuilding’.

A5.2 Under the Right to Build, councils are required to give suitable development permission for sufficient plots within three years of the end of the ‘base period’ that individuals or associations of individuals join the self-build register.

A5.3 This appendix reviews the level of demand for plots (as indicated by the council’s self-build register) in the short term (over the first 5 years since the Right to Build was introduced) and in the long term (the Plan period), and compares these to anticipated supply. This demonstrates that the council will meet its duties in relation to the Right to Build in the short term provided it is able to secure self-build and custom build plots on large housing sites. The appendix justifies the council’s starting point for negotiations, that housing sites with more than 100 new homes should provide 5% self-build and custom build plots.

A5.4 This report has a base date of 1 September 2017. The position will be updated through future Authority Monitoring Reports. In accordance with Government guidance, it is recognised that demand for plots may exceed that shown by the register, however this is currently difficult to quantify.

SHORT-TERM (First 5 years after the introduction of the Right to Build)

Demand

A5.5 At 1 September 2017, there were 181 households on Part 1 of the council’s self-build register. When the register was introduced, there was initially a high uptake in registrations, however this has slowed to a steady average of 3.5 individuals/month since April 2017. Demand has therefore been projected forward on this basis that the register will continue to grow at this rate. This shows a likely requirement for 230 custom and self-build plots by October 2021.

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45 Self-Build and Custom Housebuilding Act 2015 (as amended by 9(1) of the Housing and Planning Act 2016).
46 Self-Build and Custom Housebuilding Act 2015 (as amended by 2A 6(b) and (c) of the Housing and Planning Act 2016).
47 National Planning Practice Guidance Reference ID: 02a-021-20160401
<table>
<thead>
<tr>
<th>Base period</th>
<th>Individuals</th>
<th>Associations of individuals</th>
<th>Plots required by</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 (25 March 2016-30 October 2016)</td>
<td>115</td>
<td>0</td>
<td>30 October 2019</td>
</tr>
<tr>
<td>2 (31 October 2016-30 October 2017)</td>
<td>73&lt;sup&gt;48&lt;/sup&gt;</td>
<td>0</td>
<td>30 October 2020</td>
</tr>
<tr>
<td>3 (31 October 2017-30 October 2018)</td>
<td>42&lt;sup&gt;49&lt;/sup&gt;</td>
<td>0</td>
<td>30 October 2021</td>
</tr>
<tr>
<td>Total</td>
<td>230</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Supply**

A5.6 The following sites have either already received planning permission for self-build plots or are expected to receive planning permission before October 2021.

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<sup>48</sup> 66 households on the register at 1 September 2017 (in base period 2) with a further 7 projected to be added in the final two months of the base period.

<sup>49</sup> 12 months x 3.5 registrations/month
<table>
<thead>
<tr>
<th>Site</th>
<th>Description / Comment</th>
<th>Expected number of self-build and custom build plots</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sites with planning permission (or a resolution to approve) or a development plan allocation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Spinney, Park Prewett</td>
<td>Site has outline consent for 122 dwellings. Reserved matters application submitted for 122 self-build and custom build units in July 2017.</td>
<td>122</td>
</tr>
<tr>
<td>Hounsome Fields</td>
<td>Local Plan allocation for 750 homes. Committee resolution to approve subject to S106. Planning application submitted prior to establishment of self-build register.</td>
<td>5</td>
</tr>
<tr>
<td>East of Court Drove, Overton</td>
<td>Allocation specifically for self-build homes in the Overton Neighbourhood Plan.</td>
<td>6</td>
</tr>
<tr>
<td><strong>Sub-total</strong></td>
<td></td>
<td><strong>133</strong></td>
</tr>
<tr>
<td><strong>Large housing sites that could deliver self-build and custom-build homes with 5% delivery assumed in line with SPD Principle 5.2.</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manydown</td>
<td>Local Plan allocation for 3,400 dwellings. Outline application for 3,200 dwellings submitted in 2017. Other sites expected to make up balance of allocation. 5% delivery in accordance with adopted Manydown SPD.</td>
<td>170</td>
</tr>
<tr>
<td>East of Basingstoke</td>
<td>Local Plan allocation for 450 homes. Outline planning application expected in 2018. 5% delivery in accordance with adopted East of Basingstoke SPD.</td>
<td>22</td>
</tr>
<tr>
<td>Basingstoke Golf Course</td>
<td>Local Plan allocation for 1000 dwellings.</td>
<td>50</td>
</tr>
<tr>
<td>Upper Cufaude Farm</td>
<td>Local Plan allocation for 390 dwellings.</td>
<td>19</td>
</tr>
<tr>
<td><strong>Sub-total</strong></td>
<td></td>
<td><strong>261</strong></td>
</tr>
<tr>
<td><strong>Total across all sites</strong></td>
<td></td>
<td><strong>394</strong></td>
</tr>
</tbody>
</table>
**Balance of supply and demand**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Short term demand</td>
<td>230</td>
</tr>
<tr>
<td>Short term supply</td>
<td>394</td>
</tr>
</tbody>
</table>

A5.7 The above shows that over the next 5 years the council is able to meet its duty in relation to the Right to Build. In addition there will also be some delivery from individual windfall sites.

A5.8 Although the supply of plots exceed the level of demand in the short term, the development sites are large and will be developed through the Plan period, thus meeting the council’s longer-term needs. It is therefore important to secure the provision as part of the outline consent.

**LONG-TERM (to 2029)**

A5.9 The Local Plan (and this SPD) covers the period up to April 2029. Projecting forward the rate of growth of the self-build register, it is anticipated that by the end of base period 11 (30 October 2026) there could be 566 individuals on the self-build register. There would therefore be a requirement for the council to deliver 566 self-build and custom build plots by 30 October 2029.

A5.10 Looking to the future, there is considerable uncertainty about both supply and demand, including the scope for additional delivery from windfall sites. The council will therefore monitor delivery rates and the effectiveness of this SPD to determine whether future intervention is required.
Appendix 5.2. Process for delivering of custom and self-build plots as part of large housing sites

Planning application for residential development including a proportion of self-build or custom-build plots.

As a minimum, permission will include a Section 106 legal agreement which will secure:

- Number of 55/66 plots (SPD Principle 5.2);
- Details of timing (SPD Principle 5.3); and
- Requirements relating to the marketing and disposal of the plots (SPD Principle 5.4).

If general location is not identified by application

Prior to the approval of all reserved matters applications on the site, conditional requirement to submit, and have approved a self-build delivery strategy identifying the general location of the 55/66 plots (SPD Principle 5.5)

Submit and have approved a reserved matters application that at a minimum fixes the layout of plots and establishes the internal access arrangements

More full details been provided for the new homes?

YES

- Market plots in accordance with SPD Principle 5.4

NO

- Market plots in accordance with SPD Principle 5.4

If acceptable, dwellings to be constructed in accordance with approved plans

Has a detailed design code providing details shown each plot’s appearance, scale and landscaping been submitted with the planning application? (SPD Principle 5.5a)

YES

- Market plots in accordance with SPD Principle 5.4

NO

- Market plots in accordance with SPD Principle 5.4

If the Council considers that the design code is acceptable, condition that development be in accordance with the design code

Find design and detailing of each dwelling approved by discharge of condition

Each self builder discharges the condition with details of their home, demonstrating that they accord with the approved Design Code.

Condition to require a high-level design code to be submitted to provide a degree of continuity across all the self-build plots

Design Code submitted to and approved by the Council (SPD Principle 5.5a)

Market plots in accordance with SPD Principle 5.4

Reserved matters planning applications

Each self builders submits their own reserved matters planning application with the detailed design of their home in accordance with the approved Design Code.
If you need this information in a different format, for example large print, CD or braille, please contact the council.

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