

# FAREHAM

BOROUGH COUNCIL

## AGENDA PLANNING AND DEVELOPMENT SCRUTINY PANEL

**Date:** Wednesday, 31 January 2024

**Time:** 6.00 pm

**Venue:** Collingwood Room - Civic Offices

**Members:**

Councillor M R Daniells (Chairman)

Councillor N J Walker (Vice-Chairman)

Councillors Ms S Pankhurst

Ms F Burgess

Mrs T L Ellis

Mrs J Needham

P Nother

**Deputies:** Ms C Bainbridge

N R Gregory

Mrs P Hayre



**1. Apologies for Absence**

**2. Minutes (Pages 5 - 8)**

To confirm as a correct record the Minutes of the Planning and Development Scrutiny Panel meeting held on the 01 November 2023.

**3. Chairman's Announcements**

**4. Declarations of Interest and Disclosures of Advice or Directions**

To receive any declarations of interest from Members in accordance with the Standing Orders and the Council's Code of Conduct and disclosures of advice or directions received from Group Leaders or Political Groups, in accordance with the Council's Constitution.

**5. Deputations**

To receive any deputations of which notice has been lodged.

**6. Affordable Housing Supplementary Planning Document (Pages 9 - 64)**

To receive an Executive report on the Council's Affordable Housing Supplementary Planning Document.

**7. Planning Strategy Update (Pages 65 - 66)**

To consider an update from the Head of Planning on prevailing planning strategy matters.

**8. Executive Business (Pages 67 - 68)**

To consider any items of business dealt with by the Executive since the last meeting of the Panel, that falls under the remit of Planning and Development Portfolio. This will include any decisions taken by individual Members during the same time period.

**9. Planning and Development Scrutiny Panel Priorities**

To provide an opportunity for Members to consider the scrutiny priorities for the Planning and Development Panel.



A WANNELL  
Chief Executive Officer  
Civic Offices  
[www.fareham.gov.uk](http://www.fareham.gov.uk)  
23 January 2024

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# FAREHAM

BOROUGH COUNCIL

## Minutes of the Planning and Development Scrutiny Panel (to be confirmed at the next meeting)

**Date:** Wednesday, 1 November 2023

**Venue:** Collingwood Room - Civic Offices

**PRESENT:**

**Councillor** M R Daniells (Chairman)

**Councillor** N J Walker (Vice-Chairman)

**Councillors:** Ms S Pankhurst, Mrs T L Ellis, Mrs J Needham and P Nother

**Also  
Present:**



**1. APOLOGIES FOR ABSENCE**

No apologies of absence were received from the Panel.

**2. MINUTES**

RESOLVED that the Minutes of the Planning and Development Scrutiny Panel meeting held on the 19 July 2023 be confirmed and signed as a correct record.

**3. CHAIRMAN'S ANNOUNCEMENTS**

No announcements were made by the Chairman.

**4. DECLARATIONS OF INTEREST AND DISCLOSURES OF ADVICE OR DIRECTIONS**

There were no declarations of interest made at this meeting.

**5. DEPUTATIONS**

No deputations were received at this meeting.

**6. AUTHORITY MONITORING REPORT**

The Panel received a report from the Director of Planning and Development on the Council's Authority Monitoring Report (AMR) 2022/23. Officers explained that this is the first AMR which reflects the newly adopted Local Plan.

Members asked several questions for clarification on various topics within the AMR. The information regarding flood zones was of particular interest to the Panel with concern raised about the permissions granted within flood zones. Officers reassured Members that no houses are built on flood zones, but developments sites may include flood zones which would be designated as open spaces or park land etc. Officers also clarified that the Environment Agency (EA) are responsible for defining the flood zones and they are also consulted on all developments within the Borough. Permissions would not be granted against EA advice. The Director of Planning and Regeneration suggested that, with the Panels agreement, officers look to increase the level of detail within the AMR to clarify the rationale behind permissions being granted within flood zones.

RESOLVED that the Panel note the contents of the Authority Monitoring Report at Appendix A.

**7. PLANNING STRATEGY UPDATE**

The Panel received a presentation from the Director of Planning and Development providing a Planning Strategy Update. The presentation included an update on the Supplementary Planning Documents and Environmental Mitigation Projects. A copy of the presentation is appended to these Minutes.

The Interim Planning Strategy Lead provided information on the expected content within the Regeneration and Levelling Up Act 2023. The final version of the act is yet to be published but officers were able to provide Members with an overview of what is likely to change and how this may impact the Planning system. A key area of focus for both Members of the Panel and officers was the potential changes to the Local Plan process. With a great deal of detail still to be finalised it remains unclear how this will impact the Council.

RESOLVED that the Panel note the contents of the presentation.

**8. EXECUTIVE BUSINESS**

Members of the Panel were asked to note the Executive decision made since the last meeting of the Panel in July, which falls under the remit of the Planning and Development Portfolio.

**(1) Self and Custom Build Housing Supplementary Planning document for adoption**

No comments were received.

**9. PLANNING AND DEVELOPMENT SCRUTINY PANEL PRIORITIES**

The Panel considered the priorities for the Planning and Development Scrutiny Panel.

The Director of Planning and Development addressed the Panel to advise that an item providing an update on the Welborne Delivery would be brought to the next meeting of the Panel.

RESOLVED that the Panel considered the Scrutiny Priorities.

(The meeting started at 6.02 pm  
and ended at 7.10 pm).

..... Chairman

..... Date





# FAREHAM

## BOROUGH COUNCIL

### Report to Planning and Development Scrutiny Panel

**Date** 31 January 2024

**Report of:** Director of Planning and Regeneration

**Subject:** AFFORDABLE HOUSING SUPPLEMENTARY PLANNING DOCUMENT

#### SUMMARY

The Council, as a planning authority, has an adopted Supplementary Planning Document (SPD) which assists planning applicants in understanding the Council's expectations and planning application requirements with regards to affordable housing provision in the borough.

The current SPD was adopted in 2005 and provides guidance relating to the relevant policies contained in the Council's Local Development Scheme which was in place at the time of adoption. Following the adoption of the Fareham Local Plan 2037 in April 2023, the Council have been working to produce a new Affordable Housing SPD which sets out the current policy context, including the new affordable housing policy, provides guidance on how the policy should be applied and highlights the implications of the wider plan which should also be considered when providing affordable housing, such as design, exception sites and specialist housing.

The Planning Strategy Team and the Housing Team have worked closely together in preparing the draft SPD to ensure it provides the information needed to guide applicants through the planning process to secure affordable housing provision which meets the needs of borough residents.

#### RECOMMENDATION

It is RECOMMENDED that the Planning and Development Scrutiny Panel:-

- a) note the contents of the Executive Report; and
- b) consider and pass any comments to the Executive for consideration at their meeting on the 05 February 2024.

**Appendices:** Appendix 1 – Executive Report – Affordable Housing SPD

**Enquiries:** For further information on this report please contact Lee Smith. (Tel: 01329 824427)



# FAREHAM

## BOROUGH COUNCIL

### Report to the Executive for Decision 05 February 2024

<b>Portfolio:</b>	Planning and Development
<b>Subject:</b>	<b>Affordable Housing Supplementary Planning Document for consultation</b>
<b>Report of:</b>	Director of Planning and Regeneration
<b>Corporate Priorities:</b>	Provides Housing Choices Responsive, Inclusive and Innovative Council

#### **Purpose:**

To seek approval to consult on the draft Affordable Housing Supplementary Planning Document (SPD) – setting out the Council’s approach to the delivery of affordable housing in the Borough.

#### **Executive summary:**

The Council’s Corporate Strategy 2023-2029 sets out the priority to provide housing choices for Borough residents. The strategy recognises that the ratio between average house prices and earnings is higher in Fareham than the national average.

To address this, the Corporate Strategy sets out that the Council will continue to provide high quality affordable housing that offers choice to residents. The Fareham Local Plan 2037 supports this priority through its Provision of Affordable Housing Policy, requiring development to include affordable housing in their delivery of homes.

The purpose of the Affordable Housing SPD is to enable the successful delivery of affordable homes through planning applications by way of providing further detailed advice and guidance on policy requirements in the adopted Fareham Local Plan 2037.

This report provides a draft of the Affordable Housing SPD and seeks approval to progress the draft document to statutory public consultation. It is the intention consult over a six-week period from 16<sup>th</sup> February 2024 following which the Executive’s approval to adopt the SPD will be sought.

**Recommendation:**

It is recommended that the Executive:

- (a) approves the Draft Affordable Housing Supplementary Planning Document, as set out at Appendix A to the report, for public consultation for a six-week period; and
- (b) agrees to delegate authority to the Director of Planning and Regeneration, following consultation with the Executive Member for Planning and Development, to make any minor amendments to the document prior to the consultation.

**Reason:**

To consult on an Affordable Housing SPD which sets out the Council's approach to affordable housing delivery in the Borough.

**Cost of proposals:**

The costs of the consultation will be met within existing budgets.

- Appendices:**
- A: Draft Affordable Housing Supplementary Planning Document
  - B: SEA/HRA Screening Assessment
  - C: EqIA Screening Assessment

**Background papers:** None

**Reference papers:** Fareham Corporate Strategy 2023-2029  
Fareham Local Plan 2037

# FAREHAM

## BOROUGH COUNCIL

### Executive Briefing Paper

<b>Date:</b>	05 February 2024
<b>Subject:</b>	Affordable Housing Supplementary Planning Document for consultation
<b>Briefing by:</b>	Director of Planning and Regeneration
<b>Portfolio:</b>	Planning and Development

#### INTRODUCTION

1. Supplementary planning documents (SPDs) build upon and provide more detailed advice or guidance on policies in an adopted local plan. As they do not form part of the development plan, they cannot introduce new planning policies into the development plan. They are however a material consideration in decision-making and play a key role in describing and explaining how adopted planning policies should be interpreted and delivered through development management process.
2. The Council's Corporate Strategy 2023-2029 sets out the priority to provide housing choices for borough residents. The strategy recognises that the ratio between average house prices and earnings is higher in Fareham than the national average.
3. To address this, the Corporate Strategy sets out that the Council will continue to provide high quality affordable housing that offers choice to residents. The Fareham Local Plan 2037 supports this priority through its Provision of Affordable Housing Policy, requiring certain development to include affordable housing in their delivery of homes.
4. The preparation of an Affordable Housing Supplementary Planning Document (SPD) to replace the existing Affordable Housing SPD (2005) is included in the Local Development Scheme which was approved by the Executive on 3<sup>rd</sup> July 2023.
5. The existing Affordable Housing SPD was adopted in December 2005. There has been a significant change in housing affordability since 2005 and Government guidance on the provision of affordable housing has been updated. Therefore, it is necessary to update the Affordable Housing SPD to recognise this change in policy as well as to support the Council's updated affordable housing policy set out in the Fareham Local Plan 2037. Planning Strategy, Development Management and Fareham Housing have worked closely together in preparing the draft SPD to ensure it provides the information needed to guide applicants through the planning process to secure affordable housing provision which meets the needs of borough residents.
6. The SPD will provide guidance for developers, house builders and the public regarding the requirements of Policy HP5: Provision of Affordable Housing and Policy HP6: Exception Sites, in the Fareham Local Plan 2037. The SPD also draws attention to the

importance of design and placemaking, to ensure that development achieves consistent design quality and social inclusion. When the SPD is adopted, it will accompany the formal withdrawal of the 2005 Affordable Housing SPD.

7. Policy HP5 in the Fareham Local Plan 2037 provides support for the delivery of affordable homes. It sets out a requirement for all sites that can accommodate 10 or more dwellings, or sites with an area of 0.5 hectares or more to provide affordable housing. The required proportion of affordable home provision differs depending on the type of development site. On greenfield sites the proportion that should be delivered as affordable homes is 40%, however in the case of brownfield sites the proportion is 35% and for sites located within the defined Fareham Town Centre boundary, 20% of homes must be delivered as affordable housing. The threshold and percentages have been viability tested through the Local Plan process.

### **KEY CONTENT OF THE SPD**

8. The SPD sets out the planning policy context, from national requirements to understanding local need and provides information on the different types of affordable housing product. It guides developers on the Local Plan policy requirements and the planning application process in relation to delivering affordable units.
9. The main purpose of the SPD is to enable developers and planning applicants to understand how Policy HP5 (and HP6 - Rural and Entry Level Exception Sites or HP7 - Adaptable and Accessible Dwellings in certain circumstances) will apply to relevant planning applications in Fareham, as well as the wider Local Plan policies which should be considered, such as specialist housing and design.
10. The SPD sets out what is expected of applicants regarding the delivery of affordable units, including what the Council expect in terms of design, in line with guidance from the National Design Guide. This includes the highlighting of a series of common design issues which are encountered in relation to the delivery of affordable homes within housing developments and how the Council considers these can be addressed.
11. Throughout the SPD, there is an emphasis on the importance of engaging with the Council's Planning and Housing Teams early in the planning process to discuss considerations such as housing sizes and types and the appropriate tenure split for sites, recognising local need.
12. The SPD details the Council's approach to commuted sums in lieu of on-site affordable housing. As set out in Local Plan Policy, the Council expect that affordable housing will be delivered on site and will only accept a financial contribution, known as a commuted sum, in lieu of on-site provision where applicants can robustly justify why it is not possible to provide it on-site.
13. Commuted sums are also accepted as a contribution for a partial unit i.e. where the calculation of affordable housing requirement for a site results in a fraction of a dwelling. The Council's formula for calculating commuted sums has been reviewed by Three Dragons, an independent consultancy specialising in town planning, economics and development. This has resulted in a revised formula, which is consistent with methodology employed by other Councils to accurately reflect the financial burden of providing the required units elsewhere in the Borough.

## **EFFECT OF THE SPD**

14. The potential effect of the draft SPD has been considered through a series of screening assessments as follows:
  - Strategic Environmental Assessment (SEA) Screening Assessment: to consider whether the SPD is likely to have significant environmental effects that have not already been assessed during the preparation of the local plan.
  - Habitats Regulations Assessment (HRA) Screening Assessment: to consider whether the SPD likely to have significant adverse effects on the integrity of an internationally designated site of nature conservation importance, known as European sites.
  - Equalities Impact Screening Assessment: to consider the SPD's impact on any protected groups or characteristics that have not already been assessed during the preparation of the local plan.
15. As a result of these assessments, it is determined that no adverse effect would result from this SPD. Details of the assessments and their findings are included in appendices B & C of this report.

## **ENVIRONMENTAL CONSIDERATIONS/CARBON IMPACT ASSESSMENT**

16. The subject matter of this report is not anticipated to have an impact on the Council's carbon footprint, nor is it expected to have a detrimental or beneficial impact to the wider environment.

## **NEXT STEPS - CONSULTATION**

17. It is proposed to undertake public consultation on the draft SPD in line with the statutory requirements set out in the relevant planning regulations. A six-week consultation will take place from 16<sup>th</sup> February 2024.
18. It is proposed that the consultation is publicised on the Council's website and emails and letters are sent to all statutory consultees and other relevant individuals and organisations on the Council's Planning Strategy consultation database.
19. Following the public consultation, the Council will consider responses before moving forwards towards adoption of the new SPD.

## **CONCLUSION**

20. It is recommended, for the reasons set out in the above paragraphs, that the Executive approves the draft Affordable Housing SPD for public consultation and delegates authority to the Director of Planning and Regeneration, following consultation with the Executive Member for Planning and Development, to make any appropriate amendments to the document following consideration by the Executive, prior to the consultation.

### **Enquiries:**

For further information on this report please contact Lee Smith, Head of Planning (Tel. 01329 824427).





# Affordable Housing Supplementary Planning Document (SPD)

## January 2024

### [CONTENTS](#)



<b>1. PURPOSE</b> .....	3
<b>2. WHAT IS AFFORDABLE HOUSING?</b> .....	5
<b>Affordable Housing for Rent</b> .....	6
<b>Affordable Home Ownership</b> .....	7
<b>3. PLANNING POLICY CONTEXT</b> .....	9
<b>National Policy and Guidance</b> .....	9
<b>Local Policy and Strategy</b> .....	9
<b>Understanding Local Affordable Housing Need</b> .....	11
<b>Calculating the Affordable Housing Requirement</b> .....	11
<b>4. PLANNING PROCESS</b> .....	13
<b>Before Submission</b> .....	13
<b>Planning Application</b> .....	13
<b>5. DELIVERY OF AFFORDABLE HOUSING ON-SITE</b> .....	18
<b>Thresholds and Amount of Affordable Housing</b> .....	18
<b>Identifying an Appropriate Mix of Affordable Housing</b> .....	18
<b>Design and Placemaking</b> .....	19
<b>6. DELIVERY OF AFFORDABLE HOUSING OFF-SITE</b> .....	27
<b>Commuted Sums in Lieu of Affordable Housing On-Site</b> .....	27
<b>How is the commuted sum calculated?</b> .....	28
<b>7. EXCEPTION SITES AND SPECIALIST HOUSING</b> .....	30
<b>Rural Exception Sites and Entry-Level Exception Sites</b> .....	30
<b>Specialist Housing</b> .....	30
<b>APPENDIX 1</b> .....	32
<b>Local Plan Policies</b> .....	32
<b>APPENDIX 2</b> .....	34
<b>Affordable housing process chart</b> .....	34
<b>APPENDIX 3</b> .....	34
<b>Exemplar Scheme - Goldsmith Street, Norwich (Mikhail Riches Architects)</b> 35	
<b>APPENDIX 4</b> .....	36
<b>Exemplar Scheme - Duckworth Terrace, London (Peter Barber Architects)</b> . 36	

## 1. PURPOSE

- 1.1. A supplementary planning document (SPD) builds upon and provides more detailed advice or guidance on policies in an adopted local plan. They do not form part of the development plan and cannot introduce new planning policies into the development plan. They are however a material consideration in decision-making and play a key role in describing and explaining how adopted planning policies should be considered and delivered through the development management process.
- 1.2. This Affordable Housing Supplementary Planning Document (SPD) sets out the Council's methodology for the securing of planning obligations and affordable housing from new development within the Borough and replaces the 2005 Affordable Housing SPD. It has been prepared to support the Fareham Local Plan 2037 which was adopted by the Council on 5<sup>th</sup> April 2023. The Fareham Local Plan 2037 promotes the delivery of new affordable housing in the borough, through policies relating to affordable housing targets and exception sites.
- 1.3. This SPD provides clarity on the requirements and processes around affordable housing provision to make the Council's expectations clear and transparent. It follows on from the adopted policies in the Local Plan, providing detailed guidance, advice and up-to-date information on matters relating to affordable housing provision in Fareham and will be of particular relevance to planners, affordable housing providers and applicants building 10 or more dwellings or developing a housing site with an area of 0.5 hectares or more, as well as residents who want to know more about how we deliver affordable housing.
- 1.4. The purpose of this SPD is to enable the successful delivery of affordable homes through planning applications, with specific detail on:
  - The adopted Fareham Local Plan 2037, including Policy HP5: Provision of Affordable Housing;
  - The mechanisms for delivering affordable housing in Fareham; and,
  - Site specific requirements for sites with affordable housing provision.
- 1.5. It is essential that developers of sites where the delivery of affordable housing would be a policy requirement consider at an early stage how this will be delivered.
- 1.6. This document applies to the whole of Fareham Borough excluding the area identified as the Welborne Garden Village where Local Plan Part 3: The Welborne Plan<sup>1</sup> (2015) applies.
- 1.7. This is a draft SPD and as such is subject to public consultation. A six-week consultation on the draft SPD will take place in February and March 2024. The consultation responses will then be considered, and changes made to the final version of the SPD where appropriate. Once adopted the SPD will be a

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<sup>1</sup> <http://www.fareham.gov.uk/PDF/planning/LP3WelborneAdopted.pdf>

material consideration in determining planning applications. This SPD will be updated as required to ensure it is in line with changes in national or local policy on affordable housing.

- 1.8. This SPD has been prepared in accordance with the Town and Country Planning (Local Planning) (England) Regulations 2012 and in accordance with the Council's Statement of Community Involvement. If you require further information, you can contact the Planning Strategy Team by email at [planningpolicy@fareham.gov.uk](mailto:planningpolicy@fareham.gov.uk) or by telephone on 01329 824601.

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## 2. WHAT IS AFFORDABLE HOUSING?

- 2.1. The Government intends that everyone should have access to a decent home. At the local level one of the six corporate priorities in the Council's Corporate Strategy<sup>2</sup> (2023 – 2029) is 'Providing Housing Choices'. Delivery of affordable housing is a key aspect of providing housing choices and a priority for the Council in its Housing and Planning functions.
- 2.2. There have been many changes around affordable housing in recent years. National planning policy has changed, new affordable products have been introduced, there have been changes to the affordability of housing locally and an improved understanding of affordable need at the local level. This SPD takes account of these changes and ultimately seeks to ensure that, through the planning system, affordable housing provision is best matched to the needs of those requiring it.
- 2.3. **Definition of affordable housing (NPPF 2023):**

Housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers); and which complies with one or more of the following definitions<sup>81</sup>:

Affordable housing for rent: meets all of the following conditions: (a) the rent is set in accordance with the Government's rent policy for Social Rent or Affordable Rent, or is at least 20% below local market rents (including service charges where applicable); (b) the landlord is a registered provider, except where it is included as part of a Build to Rent scheme (in which case the landlord need not be a registered provider); and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing provision. For Build to Rent schemes affordable housing for rent is expected to be the normal form of affordable housing provision (and, in this context, is known as Affordable Private Rent).

Starter homes: is as specified in Sections 2 and 3 of the Housing and Planning Act 2016 and any secondary legislation made under these sections. The definition of a starter home should reflect the meaning set out in statute and any such secondary legislation at the time of plan-preparation or decision-making. Where secondary legislation has the effect of limiting a household's eligibility to purchase a starter home to those with a particular maximum level of household income, those restrictions should be used.

Discounted market sales housing is that sold at a discount of at least 20% below local market value. Eligibility is determined with regard to local incomes and local house prices. Provisions should be in place to ensure housing remains at a discount for future eligible households.

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<sup>2</sup> [http://www.fareham.gov.uk/pdf/about\\_the\\_council/CorpStrategy2023.pdf](http://www.fareham.gov.uk/pdf/about_the_council/CorpStrategy2023.pdf)

Other affordable routes to home ownership are housing provided for sale that provides a route to ownership for those who could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low-cost homes for sale (at a price equivalent to at least 20% below local market value) and rent to buy (which includes a period of intermediate rent). Where public grant funding is provided, there should be provisions for the homes to remain at an affordable price for future eligible households, or for any receipts to be recycled for alternative affordable housing provision or refunded to Government or the relevant authority specified in the funding agreement.

81 This definition should be read in conjunction with relevant policy contained in the Affordable Homes Update Written Ministerial Statement published on 24 May 2021.

- 2.4. As defined in the NPPF affordable housing can broadly be split into two categories with different tenures within each – affordable housing for rent and affordable home ownership. A mix of the two categories and the different tenures within them will generally be required on sites to meet the needs of residents. The following section of the SPD provides further information on the types of tenures available. For information on the most suitable tenure types for the borough applicants should contact the Council's Housing Team.

#### **Affordable Housing for Rent**

- 2.5. Affordable housing for rent (Social Rent and Affordable Rent) should be provided and managed by a Registered Provider, which includes Housing Associations, community-led housing groups (where registered with the Regulator of Social Housing) and the Council. Affordable housing for rent is allocated based on housing need, identified via the Council's Housing Register.

#### **Social Rent**

- 2.6. Social rent is a key and important form of affordable housing provision. It offers the most affordable form of affordable housing, providing for those households most in need and who are on the Council's waiting list. These households are likely to have fewer alternative housing options available to them. The rent payable is calculated through a nationally specified rent formula. Recent examples suggest that this typically equates to 45-55% of market rental costs.

#### **Affordable Rent**

- 2.7. Affordable rented properties must provide a discount of 'at least 20%' (NPPF) from local market rents. Fareham Borough Council require that affordable rent is up to 80% of market rent and within local housing allowance rates<sup>3</sup> (including service charges), whichever is the lowest.

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<sup>3</sup> <https://www.fareham.gov.uk/benefits/lharates.aspx>

### **Affordable Home Ownership**

- 2.8. There are a number of routes to affordable home ownership including shared ownership and shared equity as well as discount market sale homes, rent to buy schemes and First Homes, as set out in Annex 2 of the NPPF.

#### Shared Ownership

- 2.9. Shared ownership enables occupants to buy a share of a property, whilst paying rent on the remaining value. Shared ownership homes are valued at market value and applicants purchase the maximum % share they can afford (within parameters allowed).
- 2.10. The initial share available to purchase is between 10-75%. The occupant can then purchase additional shares as and when affordable to the occupant. Purchasers are able to staircase to 100% ownership. Further information on the operation of Shared Ownership, including eligibility criteria, can be viewed on the Government's shared ownership website<sup>4</sup>.
- 2.11. More information on affordable home ownership in Fareham can be found on the Council's website<sup>5</sup> along with the Affordable Home Ownership Register which allows households to express an interest in purchasing Council affordable home schemes.

#### Shared Equity

- 2.12. Shared Equity enables homebuyers to pay a smaller deposit towards their home (usually 5%) while taking out an equity loan for the rest of the deposit (usually 20%). The equity loan is usually low, or no cost, meaning that little or no interest is payable, however the equity loan is repayable in full at the end of the loan period. Alongside this, the homebuyer would need to take out a mortgage for the rest of the property value.

#### Discounted Home Ownership

- 2.13. Discounted home ownership / discounted market sales housing are terms describing housing which is sold at a discount of at least 20% of the local market value. The home is bought outright by purchasers who meet the eligibility criteria with any future re-sale restricted to a discount market price to ensure the home remains affordable.

#### Rent to Buy

- 2.14. Rent to Buy enables eligible occupants to rent a property at a discount of 20% below the open market rent, in order to save for a deposit to purchase the home in the future. Rent to Buy is an affordable home ownership tenure rather than a rental tenure, as the purpose is to provide an opportunity ultimately for affordable home ownership.

#### First Homes

- 2.15. Introduced in 2021, First Homes is designed to help first time buyers who wish to get onto the property ladder but are unable to afford a home at full market

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<sup>4</sup> <https://www.gov.uk/shared-ownership-scheme>

<sup>5</sup> <https://www.fareham.gov.uk/housing/affordablehomeownership.aspx>

value.

- 2.16. A First Home must be offered at a minimum of 30% discount on the market price, with the discount held in perpetuity. On the initial sale, the property should be no more than £250,000. First homes do not apply to some developments, including self-build, 100% affordable housing schemes and specialist accommodation such as sheltered schemes.
- 2.17. Fareham falls under the transitional arrangements for First Homes as the Council's Local Plan was submitted for examination before the policy took effect<sup>6</sup> and it is therefore confirmed this type of affordable housing is not a Local Plan Policy requirement.
- 2.18. However, should an applicant wish to include First Homes in a development proposal, this should be discussed with the Council at the earliest opportunity. The Council will consider the need and affordability of the product on a site-by-site basis using the Council's Affordable Home Ownership Register where Households can express an interest in accessing a First Home. The data will be used by the Council to have a better understanding of need and affordability in the borough for First Homes, to help inform planning applications.
- 2.19. For schemes where First Homes is accepted as meeting an affordable housing need, Fareham Borough Council's Interim First Homes policy<sup>7</sup> sets out the council's approach to delivering this tenure.

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<sup>6</sup> First Homes policy requirement, as per the Written Ministerial Statement 24 May 2021, whereby on new developments of 10 or more dwellings or sites of 0.5 hectares or more, 25% of the affordable homes should be First Homes.

<sup>7</sup> <https://www.fareham.gov.uk/PDF/housing/InterimFirstHomesPolicy.pdf>



### 3. PLANNING POLICY CONTEXT

#### National Policy and Guidance

- 3.1. The National Planning Policy Framework (NPPF) (updated December 2023) sets out the national planning policies for England. Paragraphs 63 to 66 address the delivery of sufficient housing including affordable housing. Paragraph 63 states that the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies including those who require affordable housing, while paragraph 64 highlights that planning policies should specify the type of affordable housing required and expect it to be met on-site other than in specific circumstances. Paragraph 65 identifies the site types for which affordable housing requirements should be reduced or not sought and the requirement for 10% of dwellings on major housing sites to be available for affordable home ownership is set out in paragraph 66, with various exceptions.
- 3.2. Planning Practice Guidance (NPPG) on Housing Needs of Different Groups (updated May 2021)<sup>8</sup> describes how to assess the need for affordable housing. There is also specific guidance in relation to First Homes<sup>9</sup>, a new type of affordable housing introduced in 2021. Build to Rent NPPG<sup>10</sup> sets out that this type of housing development should be required to provide affordable housing, specifically through the tenure of 'affordable private rent'.
- 3.3. The National Design Guide<sup>11</sup> is also of relevance and states that well designed places should include a mix of home tenures, types and sizes in order to provide homes that suit all needs and ages, including affordable housing. The design guide goes on to say that where different tenures are provided, they should be well-integrated and designed to the same high quality to create tenure neutral homes and spaces, where no tenure is disadvantaged. Good design promotes social inclusion by maximising the potential for social integration in the layout, form and appearance of types of development and providing a consistent level of design quality across tenures and utilises layouts that promote social interaction and integration.

#### Local Policy and Strategy

- 3.4. The Council's Affordable Housing Strategy<sup>12</sup> sets out the Council's approach for achieving the provision of suitable housing for the residents of the Borough. The main aim of the strategy is to marshal the resources of each relevant agency to ensure that all the residents of Fareham have access to a decent home which is affordable within their means. Three key objectives are set within this overall aim:
  - To deliver more affordable homes through the planning system.
  - To ensure those homes are the right homes in the right places and that they are truly affordable for those that need them.

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<sup>8</sup> <https://www.gov.uk/guidance/housing-needs-of-different-groups>

<sup>9</sup> <https://www.gov.uk/guidance/first-homes>

<sup>10</sup> <https://www.gov.uk/guidance/build-to-rent>

<sup>11</sup> <https://www.gov.uk/government/publications/national-design-guide>

<sup>12</sup> [https://www.fareham.gov.uk/PDF/housing/AHS\\_2019.pdf](https://www.fareham.gov.uk/PDF/housing/AHS_2019.pdf)



- To directly deliver more affordable homes by Registered Providers and Fareham Housing, especially targeting those in greater need.
- 3.5. The Fareham Local Plan 2037 adopted in April 2023 includes Policy HP5: Provision of Affordable Housing, which details how the Council expect new affordable housing will be delivered through the planning system in Fareham.

#### ***Policy HP5: Provision of Affordable Housing***

**Sites that can accommodate 10 or more dwellings or sites with an area of 0.5 hectares or more shall provide:**

- a) In the case of greenfield sites 40% of dwellings as affordable housing; and**
- b) In the case of brownfield sites 35% of dwellings as affordable housing; and**
- c) In the case of sites located within the defined Fareham town centre boundary, 20% of dwellings as affordable housing.**

**The affordable housing must be provided in accordance with the following proportions:**

- i. At least 10% as Social Rent; and**
- ii. At least 55% as Affordable Rent; and**
- iii. At least 10% of the overall housing provision on site to be provided as Affordable Home Ownership.**
- iv. The mix of property size and type should reflect the local need and the site characteristics.**

**The Council will only accept affordable housing provision off site or an appropriate financial contribution in lieu where it is robustly justified and where it contributes to the objective of mixed and balanced communities.**

**All Affordable Rent provision shall have rents and service charge at no more than 80% of market rent or the relevant Local Housing Allowance, whichever is the lower.**

**The Viability Study concludes that affordable housing is not viable for older persons and specialist housing. Therefore, Policy HP5 does not apply to specialist housing or older persons housing.**

- 3.6. Policy HP5 seeks to maximise the supply of affordable homes in terms of the proportion of affordable housing sought and the thresholds supplied. The policy also considers the need for the tenures with the greatest need, subject to viability considerations. The policy requires a provision of 20-40% affordable housing dependant on scheme size and location (excluding Welborne) with a tenure mix of at least 10% Social Rent, at least 55% as Affordable Rent and at least 10% of the overall housing provision on site to be provided as Affordable Home Ownership.

- 3.7. The Local Plan also contains a policy on exception sites, Policy HP6:

Exception Sites (see appendix 1). This seeks to address identified crucial affordable housing needs of rural communities by enabling the development of small sites that would not normally be used for housing, where it can be demonstrated that the need for such homes is not already being met elsewhere in the Borough. Such sites are specifically for the purposes of providing 100% affordable housing in perpetuity.

- 3.8. The Local Plan also includes policies relating to design which will be applicable to the provision of affordable housing. In particular, the supporting text to Policy D1: High Quality Design and Place Making (see appendix 1), references design principles including the provision of an integrated mix of housing tenures and types to suit people at all stages which should also be designed to be tenure neutral and socially inclusive.
- 3.9. A further Local Plan Policy for consideration in relation to the provision of affordable homes is Policy HP7: Adaptable and Accessible Dwellings (see appendix 1). This policy identifies the development proposals which are required to provide such dwellings in accordance with Part M, Categories 2 and 3 of Building Regulations<sup>13</sup>.
- 3.10. This SPD does not introduce any additional requirements but sets out the detail of how Policies HP5, HP6 and HP7 will be applied in practice. Applicants are advised to consider the requirements of Policy HP5, HP6 and HP7 (if applicable) in full in relation to their development proposal.

#### **Understanding Local Affordable Housing Need**

- 3.11. The Local Plan affordable housing need was established through the Affordable Housing Background Paper (Sept 2022)<sup>14</sup>. That assessment provided an analysis of the need and supply of affordable housing in the Borough at that time. This was informed by the Council's housing register for rented accommodation and the affordable home ownership register which provide data on local affordable housing need.
- 3.12. Alongside considering the affordable housing need in the Borough, the Council must also consider what is a reasonable and viable expectation for development in terms of the percentage of dwellings that should be provided as affordable housing in a scheme.

#### **Calculating the Affordable Housing Requirement**

- 3.13. When calculating the affordable housing requirement for a site, first the total number of affordable units required should be calculated. In accordance with Policy HP5, this is 35-40% of the total units depending on whether the site is brownfield or greenfield, or 20% if the site is located within the defined Fareham town centre.
- 3.14. Next the affordable provision must be split in accordance with points i-iii of the

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<sup>13</sup> <https://www.gov.uk/government/publications/access-to-and-use-of-buildings-approved-document-m>

<sup>14</sup> <https://moderngov.fareham.gov.uk/documents/s32740/Appendix%209%20Revised%20Affordable%20Housing%20Topic%20Paper%20September%202022.pdf>

policy with **at least** 10% being Social Rent and 55% being affordable rent. The Affordable Home Ownership element should then be calculated as a proportion of the **overall number of homes on the site** as opposed to a proportion of the affordable housing element. In accordance with NPPF requirements, at least 10% of the total number of homes should be affordable home ownership.

- 3.15. It is recommended that applicants seek advice and engagement with the Housing team to understand the local need at the earliest opportunity so that the tenure, mix and size of affordable homes are reflective of local need. In addition, information on the Council's affordable housing need can be found on the Council's website<sup>15</sup>.
- 3.16. To help meet the need for Social Rent, developments which propose the delivery of Social Rent properties over and above the 10% requirement are likely to be encouraged and applicants should seek discussions with the Council in this regard.
- 3.17. The following examples demonstrate how the calculation will be applied by the Council.

**Example: 100 Home Scheme on Greenfield Site**

1. Affordable Housing Requirement: 40% of 100 homes = 40 homes
2. Social Rent: 10% of 40 homes = 4 homes (minimum)
3. Affordable Rent: 55% of 40 homes = 22 homes (minimum)
4. Affordable Home Ownership: 10% of 100 homes (total site) = 10 homes
5. Remaining minimum affordable housing requirement = 4 homes to be delivered in accordance with tenure need identified following liaison with Council's Housing Team.

**Example: 40 Home Scheme on Brownfield Site**

1. Affordable Housing Requirement: 35% of 40 homes = 14 homes
2. Social Rent: 10% of 14 homes = 2 homes (minimum - rounded up from 1.4)
3. Affordable Rent: 55% of 14 homes = 8 homes (minimum - rounded up from 7.7)
4. Affordable Home Ownership: 10% of 40 homes (total site) = 4 homes
5. Total minimum affordable housing requirement met.

<sup>15</sup> [https://www.fareham.gov.uk/housing/looking\\_for\\_a\\_home/affordablehousingneed.aspx](https://www.fareham.gov.uk/housing/looking_for_a_home/affordablehousingneed.aspx).

## 4. PLANNING PROCESS

- 4.1. The Council expects that, where required, affordable housing will be provided on site. A process chart to aid applicants through the process is included at Appendix 2. As set out in Policy HP5, off-site provision, or a financial contribution in lieu, will only be considered in circumstances where it can be robustly justified. More information can be found in section 6 of this SPD.

### Before Submission

- 4.2. The Council considers it is important that pre-application advice is sought where a development is likely to give rise to an affordable housing requirement. This helps to address any issues prior to submission of an application and applicants are strongly encouraged to make use of the Council's pre-application service.
- 4.3. The aim of this service is to ensure that applicants are informed of the likely works required for a proposed development at the earliest opportunity and allows issues such as local housing need and demand to be considered. The discussions will include an indication of the number, type, size, tenure and distribution of the affordable housing to be provided.
- 4.4. Before submitting a planning application (preferably to be discussed through the pre application process), the council will expect the applicant to have:
- Identified the affordable housing provider and discussed the delivery of the affordable housing element of the development.
  - Reached agreement with the chosen affordable housing provider in respect of the design and specification of the affordable housing units.
  - Agreed the arrangements for the provision of affordable housing with the affordable housing provider; and
  - Determined whether specialist providers (such as Adult Social Care) will need to be engaged in relation to the proposed development, to gain a better understanding of any requirements they might make in relation to the proposed development.

### Planning Application

- 4.5. It is the responsibility of the applicant to demonstrate how the affordable housing requirement of the scheme will be met. In line with the Local Information Requirements<sup>16</sup> list, any application required to deliver affordable housing will be required to submit an Affordable Housing Statement. The Affordable Housing Statement should include information about both the affordable housing and any market housing. If different tenures are proposed for different units, this should be clearly and fully explained.
- 4.6. The Affordable Housing Statement should include details of any registered social landlords acting as partners in the development. The statement should also include an affordable housing plan with the tenures and sizes of the units clearly indicated and an affordable housing schedule to detail the following:

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<sup>16</sup> [https://www.fareham.gov.uk/planning/applications\\_and\\_advice/localrequireddocs.aspx](https://www.fareham.gov.uk/planning/applications_and_advice/localrequireddocs.aspx)

- Location of units/plot numbers.
- Tenure (Social Rent, Affordable Rent, Shared Ownership, Open Market etc.).
- Type (flat, terraced house, detached house etc.).
- Height/number of storeys.
- Number of bedrooms.
- Number of persons (bedspaces).
- M4(2) and M4(3) units identified.
- Room sizes/storage requirements for Space Standards compliance (sq.m).
- Number of Parking spaces.
- Summary schedule to demonstrate compliance with tenure and bedroom/bedspaces requirements discussed at pre-application stage (template below).

	<b>SOCIAL RENT</b>	<b>AFFORDABLE RENT</b>	<b>SHARED OWNERSHIP</b>	<b>TOTAL</b>
<b>1 bed 1 person flat</b>				
<b>1 bed 2 person flat</b>				
<b>1 bed 2 person house</b>				
<b>2 bed 3 person flat</b>				
<b>2 bed 3 person house</b>				
<b>2 bed 4 person flat</b>				
<b>2 bed 4 person house</b>				
<b>3 bed 4 person house</b>				
<b>3 bed 5 person house</b>				
<b>3 bed 6 person house</b>				
<b>4 bed 5 person house</b>				
<b>4 bed 6 person house</b>				
<b>4 bed 7 person house</b>				
<b>4 bed 8 person house</b>				
<b>Total No.</b>				
<b>Total %</b>				

Table 1: Template affordable housing table

Viability

- 4.7. Proposals that are submitted without a policy compliant level of affordable housing must be accompanied by a sufficiently detailed viability assessment

as set out in national guidance<sup>17</sup> which will be reviewed by the Council (and a third party on its behalf). To allow this analysis to take place in an open and transparent manner a viability report, completed using a recognised toolkit<sup>18</sup>, should be provided as part of any pre-application discussion or the application submission, with the data and information available in an open-book format.

- 4.8. The assessment should clearly outline the maximum number of affordable dwellings which can be achieved on site. Costs associated with the assessment and third-party review should be met by the applicant. The assessment will be published on the Council's website upon submission of the planning application.

#### Legal Agreements

- 4.9. The delivery of affordable housing will be secured through a Section 106 legal agreement (S106) between the Council, the applicant and any other party with an interest in the land.

- 4.10. A S106 agreement will generally secure the affordable housing and will normally include:

- The number of affordable dwellings.
- The type, tenure and size (number of bedrooms/bedspaces) of dwellings.
- Requirement for units to be tenure blind and for integration of tenures to be maximised.
- Arrangements for ensuring that the housing remains affordable in perpetuity.
- Nomination arrangements for the rented affordable housing units
- Phasing of the completion of dwellings.
- How the affordable housing will be achieved e.g. through construction and transfer of units.
- Occupancy criteria; and,
- Mortgagee in possession clauses.

#### Vacant Building Credit

- 4.11. Vacant Building Credit is an incentive to develop brownfield sites by reducing affordable housing contribution requirements. The principle is set out in the NPPF paragraph 65, and guidance on eligibility set out in the Planning Obligations PPG at Paragraph 028 Reference ID: 23b-028-20190315. Applicants should refer to the PPG if it is considered Vacant Building Credit applies to the scheme and contact the Council's Planning Team to discuss at an early stage.

#### Schemes providing Affordable Housing 'Additionality'

- 4.12. If an applicant wishes to provide 'additionality', that is, affordable housing over and above the amount secured in the S106 legal agreement, this should be discussed with the Council at the earliest opportunity. The Council recognises that Strategic Partnerships with Homes England and the Affordable Homes

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<sup>17</sup> <https://www.gov.uk/guidance/viability>

<sup>18</sup> A recognised toolkit such as HCA Developers Appraisal Toolkit or the Communities Agency Economic Appraisal Toolkit. <https://www.gov.uk/government/publications/development-appraisal-tool>

Programme 2021-2026 are grant funding routes for additionality.

- 4.13. Where additionality is proposed, the Council would encourage the additional affordable housing units be provided in accordance with the agreed tenure mix, size and placement requirements of the site. It may be appropriate for the applicant to work with the Council to produce a Local/Community Lettings Plan<sup>19</sup> for any additional rented affordable units provided, to further facilitate the creation of a mixed and inclusive community.
- 4.14. For both policy compliant and any additional affordable housing units, it is expected that the registered provider contacts the Council's Housing Team for nominations to the new social and/or affordable rent properties as per the Council's nominations agreement with registered providers i.e., the Council will nominate individuals/ families from FBCs housing register who are suitable for the property.

#### Self and Custom Build Housing as Affordable

- 4.15. The NPPF (footnote 29) makes clear that self-build and custom build properties could provide affordable housing. The NPPG Self Build and Custom Housebuilding Guidance makes general reference to the link between self and custom build and affordable housing: 'More widely, relevant authorities can play a key role in brokering and facilitating relationships to help bring suitable land forward. This can include....:
- working with local partners, such as Housing Associations and third sector groups, to custom build affordable housing for veterans and other groups in acute housing need.'
- 4.16. The adopted Fareham Local Plan Policy HP9 Self and Custom Build Homes requires that on sites of 40 dwellings or more (gross), 10% of the overall dwellings shall be provided through the provision of plots for sale to address local self or custom build need.
- 4.17. The Council will not specifically require developments to offer the self/custom build element as affordable housing. Where a site of 40 or more dwellings comes forward, this will trigger both a requirement for affordable housing and a self and/or custom build element. Applicants may seek to provide for their affordable housing requirement via a Registered Provider and contractor in the normal way and provide the self/custom requirement as part of the open market provision.
- 4.18. However, the Council acknowledge that self/custom build plots could contribute toward affordable housing through the provision of affordable self/custom build plots. This combined approach would need to provide genuinely affordable housing to meet the identified affordable housing need for the site and must be considered as an integrated part of the overall affordable housing tenure mix.
- 4.19. To meet the statutory definition of affordable housing and in recognition that

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<sup>19</sup> A plan to respond to local circumstances when allocating social and affordable rented homes to achieve a balanced cohesive community.

self-building may not be a route open to those on lower incomes, the Council consider that custom build may generally be the most appropriate way to deliver affordable housing as part of self and custom build provision. It is important that any proposals for affordable self or custom build plots address an identified need, based on the evidence available.

4.20. Where an application seeks to provide affordable self or custom build, the Council will seek to secure the requirements through S106 or planning conditions, including:

- the method of affordable provision
- the discount applied (for discount market homes)
- the eligibility criteria of purchasers
- the dwellings will remain affordable in perpetuity, secured at a discounted rate for future occupants
- the marketing strategy requirements.

Applicants should also familiarise themselves with the application requirements set out in the Self and Custom Build SPD<sup>20</sup>, available on the Council's website.

4.21. The Council will be working proactively to gather data in respect of affordable self and custom build need and eligibility in the borough. Applicants are strongly encouraged to use the Planning Pre-Application service to discuss the provision of self/custom build plots as affordable housing to ensure the proposal meets identified need and the site is considered appropriate for this kind of provision.

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<sup>20</sup> [https://www.fareham.gov.uk/pdf/planning/local\\_plan/SelfCustomBuildSPD\\_Oct23.pdf](https://www.fareham.gov.uk/pdf/planning/local_plan/SelfCustomBuildSPD_Oct23.pdf)



## 5. DELIVERY OF AFFORDABLE HOUSING ON-SITE

### Thresholds and Amount of Affordable Housing

- 5.1. The number of affordable homes to be provided is set out in Policy HP5. Affordable housing will be sought on sites of 10 or more dwellings (or with a site area of 0.5 hectares or more). Should a site fall below the applicable threshold but is demonstrably part of a larger or potentially larger development site, then the Council will seek affordable housing on a pro-rata basis to achieve an overall affordable provision as if the site were a whole.
- 5.2. The policy basis for this approach is set out in Policy D3: Coordination of Development and Piecemeal Proposals, which states that applications that seek to evade infrastructure provision including affordable housing by not fully maximising the use of the site or by putting forward piecemeal development will not be supported. The Council will use planning conditions together with appropriately worded legal agreements, to secure all aspects of wider development.

### Identifying an Appropriate Mix of Affordable Housing

- 5.3. There is a need for a range of home types and sizes in the borough. The Council aims to ensure that the affordable housing delivery provides a range of property types, sizes, and tenures to meet these needs. The Council will seek a range of units to cater for different sized households, depending on the size, location and affordable housing requirement of a site. A mix of unit types, sizes and tenures can contribute to the social inclusivity of a site. These units should be delivered to provide for the maximum floorspace/occupancy when looking at the national technical standards to provide maximum flexibility in their future use. Therefore, all house types should be delivered to reflect the size as indicated in table 2:

<b>Unit Type</b>	<b>Expected Occupancy</b>
<b>1 bed flat</b>	<b>2 people</b>
<b>2 bed flat</b>	<b>4 people</b>
<b>1 bed house</b>	<b>2 people</b>
<b>2 bed house</b>	<b>4 people</b>
<b>3 bed house</b>	<b>6 people</b>
<b>4 bed house</b>	<b>8 people</b>

Table 2: Expected National Technical Standards Dwelling Occupancy and Size by unit type.

- 5.4. This approach provides flexibility in supply, providing for families with children who need such properties. Affordable homes should allow for a mix of household sizes, particularly in rented accommodation, to meet the needs of larger families on the housing register. 2 bed units for rent should be predominantly homes with their own front door and private outdoor space to reflect that the occupancy space of these units will be maximised and therefore likely to house families with children.
- 5.5. It is important that sites provide a balance of unit types, both market and affordable. This will ensure that identification of tenure is not through

development form, for example where large houses are market units and small houses or apartments are affordable. This approach is unlikely to be supported. The Council expects the mix to be delivered through balancing the form i.e. if there is a need for 1 and 2 bed affordable units, then the equivalent market provision will be expected.

- 5.6. The Council's Affordable Housing Need webpage<sup>21</sup> should form the starting point of understanding the local affordable housing need and what mix is likely to be required. In all instances the Council strongly encourages applicants to discuss their scheme with the Council, including the Housing Team through the pre-application process. Where schemes are submitted without the benefit of pre-application advice being received, there may be delays resolving issues around the proposed provision.

### **Design and Placemaking**

- 5.7. The Council's approach to the design and layout of Affordable Housing is drawn from the National Design Guide and Local Plan 2037 Policy D1: High Quality Design and Placemaking (Appendix 2).

### **Social Inclusivity**

- 5.8. The National Design Guide identifies that a guiding principle of development should be that it is socially inclusive. The Council will expect all proposals to adhere to the key principles of social inclusivity referenced in the National Design Guide<sup>22</sup> as set out below:

'Good design promotes social inclusion by:

- contributing to creating balanced and mixed neighbourhoods that are suitable and accessible for all.
- maximising the potential for social integration in the layout, form, and appearance of types of development.
- avoiding features that could create actual or perceived barriers, or contribute to segregation, both within the development and with its surroundings.
- providing a consistent level of design quality across tenures, to support social integration; and
- using local resources such as schools, nurseries, community facilities, parks, other open spaces, health, and religious or cultural facilities as destinations in layouts to promote social interaction and integration and help combat loneliness.'

- 5.9. The Council also expect the provision of affordable homes to achieve the National Design Guide principle of tenure neutrality:

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<sup>21</sup> [http://www.fareham.gov.uk/housing/looking\\_for\\_a\\_home/affordablehousingneed.aspx](http://www.fareham.gov.uk/housing/looking_for_a_home/affordablehousingneed.aspx)

<sup>22</sup> [https://assets.publishing.service.gov.uk/media/602cef1d8fa8f5038595091b/National\\_design\\_guide.pdf](https://assets.publishing.service.gov.uk/media/602cef1d8fa8f5038595091b/National_design_guide.pdf)

‘Tenure neutral:




- Housing where no group of residents is disadvantaged as a result of the tenure of their homes. There is no segregation or difference in quality between tenures by siting, accessibility, environmental conditions, external facade or materials. Homes of all tenures are represented in equally attractive and beneficial locations, and there is no differentiation in the positions of entrances. Shared open or play spaces are accessible to all residents around them, regardless of tenure.’

Layout Design Criteria

- 5.10. The affordable housing component of any site should be constituted of a mix of tenures, dwelling types, and sizes, and delivered to the same design, construction standards and external appearance as the market housing. However, it is common to see planning applications submitted with distinct differences in design, form and identity of groups of tenure and form specific properties.
- 5.11. The common overarching issue with many submitted proposals, is that the design approach seeks to minimise social integration rather than maximise the integration of affordable units within the siting, typology and layout of new housing.
- 5.12. Figure 1 identifies several of the common issues arising from the minimal approach. It also describes the design solution that the Council will expect to see to achieve the desired design standard.
- 5.13. Maximising the integration of affordable units into a scheme design can only be achieved by utilising a ‘pepper-pot’ distribution of tenures. This helps to not only support the creation of safe and attractive places for people to live in but also ensures that where separate enclaves of housing are developed within a layout as a result of spatial constraints, they are not exclusively single tenure, nor distinguishable by typology, form and external appearance. Maximising social integration is also delivered through ensuring other key design principles are followed such that places are connected within attractive walkable streets and spaces, encouraging healthy lifestyles and social interaction, and avoiding unit segregation caused by a focus on unconnected carriageways and their associated footway geometry and associated movement (for example see point 14, Figure 1).
- 5.14. An example scheme design is presented in Figure 2. This demonstrates how the solutions identified in Figure 1 and the principles identified in the National Design Guide and Local Plan Policy D1 which the Council will expect to see in scheme designs can be addressed. These principles will ensure an integrated and connected residential environment that is conducive to social interaction.

Figure 1: Common issues and solutions for layout and design

Common Issues		Design Solution
	<p>1. Affordable units set out and segregated within separate enclaves without shared ped/cycle links. Units inward orientated and avoiding relationships to road or open space. Tree planting / landscape further erodes perception of separate rather than integrated relationship.</p>	<p>Enclave to include market houses to achieve a mix of tenures thus avoiding a sense of separation and distinctive treatment of parking and relationship to open space</p>
	<p>2. Only market units front public space within unconnected streets. Perception of separation of tenures.</p>	<p>Affordable units to front public space also thus avoiding a sense of separation and distinctive treatment of units that relate to open space.</p>
	<p>3. Affordable units set back from road with distinguishing frontage parking arrangement despite same unit form as market. Set back does not contribute to creating harmonious building line</p>	<p>Terrace to include market housing to avoid sense of separation by distinctive parking treatment</p>
	<p>4. Public open space footpath link accessed via private drive with no link to affordable units</p>	<p>Connect affordable units and cul-de-sacs with foot/cycle path and/or carriageway</p>
	<p>5. Through movement and interaction curtailed by lack of link and physical presence of market garage turning its back to flats.</p>	<p>Make connections to link development parcels. Include mix of tenure</p>
	<p>6. All flatted units are affordable without any corresponding market provision. This identifies a form of development that distinguishes affordable from private.</p>	<p>Design apartments with individual accesses from ground levels allowing for a mixed tenure block.</p>
	<p>7. Detached affordable units are segregated from market detached units and do not have the same parking arrangements or boundary treatments.</p>	<p>Integrate affordable detached units within the same development parcels using the same parking and boundary treatments.</p>
	<p>8. Access, parking, and boundary structures physically and visually segregate flatted form from houses. Scale of flatted blocks further distinguishes and separates form from integrating within the streetscene</p>	<p>Ensuring market flats are provided ensures more integration. Flat forms should be of a scale that links better with adjacent houses.</p>
	<p>9. Entry gateway features in the form of landscape and surface material changes reinforces segregation of tenure.</p>	<p>Utilise same surface carriageway materials with mix of tenures</p>

<b>Common Issues (cont)</b>		<b>Design Solution</b>
 <p>Market housing Affordable housing</p>	<p>10. Local Equipped Area of Play (LEAP) located adjacent to and visually linked with affordable units.</p>	<p>Introduce a mix of tenures within terrace to avoid community facilities that appear to be focused towards one form of tenure.</p>
	<p>11. Affordable units parking and ped access to front doors sited within adjacent affordable enclave rather than part of its own terrace arrangement with market units.</p>	<p>Enclave to include market houses to achieve a mix of tenures. Market unit to have same footway and path linkages thus avoiding a sense of separation and distinctive treatment of parking.</p>
	<p>12. Affordable terraced units set back from road with distinguishing frontage parking organised as an enhanced 'square'. The 'square' distinguishes and highlights affordable from other market forms on site through surface materials, and unit set back.</p>	<p>Introduce market units to 'square' to avoid sense of separation and distinctive treatment of access and parking.</p>
	<p>13. Affordable units set back from road with distinguishing frontage parking despite same form as market semi-detached. Set back does not contribute to creating harmonious building line</p>	<p>Semis to include market housing to avoid sense of separation by distinctive parking treatment with parking designed to side.</p>
	<p>14. Affordable units located at the end of cul-de-sac without through links. Footpath link accessed via private drive with no link to affordable units.</p>	<p>Introduce market units to cul-de-sac and ensure through links that pick up surrounding path or introduce continuous carriageway through to market units.</p>



**Figure 2: Placemaking Principles to be Applied to Affordable Housing**



The principles of good design and placemaking is set out in the National Design Guide and Policy D1 of the Fareham Local Plan 2037.

Fig3 seeks to demonstrate how, in addition to 'pepper-potting' tenures, creating safe and attractive places for people is a key component of the design process to deliver housing in the borough.

Fig 3 highlights how places need to be connected within an attractive, walkable series of streets and spaces, encouraging healthy lifestyles and social interaction; avoiding segregation and a focus on carriageway and associated footway geometry.

**5.15. The information in the following section of the SPD is supported through two exemplar developments set out in appendices 3 & 4 that demonstrate the various approaches and how they can be delivered in different contexts.**

Apartment Blocks

5.16. Appropriately designed apartments can provide valuable and suitable smaller accommodation for single or two person(s) and, with sufficient internal and external space, for 3 and 4 persons. Such accommodation lends itself to market housing and affordable housing, for purchasers starting on the housing ladder and persons downsizing or within sheltered arrangements.

5.17. The integration of apartments within residential developments is often poorly designed:

- Over-scaled blocks that do not sit comfortably within the streetscene.
- Isolation of blocks due to single tenure occupancy.
- Isolation of blocks due to the mix of unit typology within the development, whereby only the apartments are affordable tenure, and the houses are market properties.



*Figure 3: Historic example of lack of integration in both form, appearance, townscape and tenure*

5.18. Apartments blocks should be designed in a way that follows the principles set out in the National Design Guide:

- Maximising the potential for social integration in the layout, form and appearance of types of development.
- Avoiding features that could create actual or perceived barriers, or contribute to segregation, both within the development and with its surroundings.
- Providing a consistent level of design quality across tenures, to support social integration.
- There is no segregation or difference in quality between tenures by siting, accessibility, environmental conditions, external facade or materials.

- Homes of all tenures are represented in equally attractive and beneficial locations, and there is no differentiation in the positions of entrances.

5.19. In order to achieve the principles, the following attributes of apartment design and delivery will be required.

#### *Scale*

5.20. Within the different settlements of the borough, the scale of residential areas is predominantly 2 storeys, with occasional 2.5 and 3 storeys, even within the urban core of centres. Fareham town centre has a significantly greater proportion of 3 and occasional 4 storey buildings and is generally of a more compact and intense arrangement.

- **In order to integrate apartments successfully within a streetscene, the block structure should be no greater than 0.5 storeys higher than adjacent residential houses or other buildings.**
- **The number of apartments within a single block should be limited to between 4 and 6 to avoid a structure whose mass will be dominant in the streetscene and in its relationship to adjacent 2 storey houses. This unit limit will also reduce the amount of surrounding parking and communal space that can physically isolate the block within the streetscene.**

5.21. It is recognised that unit numbers and scale can be greater if the existing context is supportive. However, this can make mixed tenure arrangements more difficult to achieve. Sufficient supporting material will need to be provided within a Design and Access Statement to demonstrate suitability.

#### *Mixed Tenure*

5.22. Delivering mixed tenure to maximise social integration and avoid differentiation through unit type, as set out in the National Design Guide, can be achieved through mixed tenure block design that avoids communal areas where service charges and management of spaces can be prohibitive. Therefore:

- **The Council will require apartment blocks of up to 3 storeys to provide separate front door accesses for each unit from the ground floor space.**

5.23. The ground floor front door access typology can be employed to nearly all contexts within the borough. The Council has identified two exemplar developments that demonstrate the approach and how this can be delivered in different contexts.



### *Car Parking*

5.24. Car parking for apartments is generally provided within communal arrangements, whether allocated or non-allocated. Where mixed tenure blocks are provided with a shared parking area, the parking spaces must not be visually or physically segregated, nor have distinct pedestrian and vehicular routes from the accommodation or access road. In addition, the surface treatment and landscaping, together with the provision of cycle and bin storage, will be the same design.

### *Communal open space*

5.25. The Council's current residential design guidance<sup>23</sup> requires amenity space for apartments to be provided at a ratio of 25m<sup>2</sup> per unit.

5.26. This is usually designed as a single private communal space but allows for individual private spaces to serve ground floor units where the design is appropriate. Where mixed tenure blocks are designed, the garden space must not be visually or physically segregated between tenures, nor have distinct pedestrian and vehicular routes from the accommodation or access road.

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<sup>23</sup> [https://www.fareham.gov.uk/PDF/planning/local\\_plan/FBCDesignGuidanceSPD.pdf](https://www.fareham.gov.uk/PDF/planning/local_plan/FBCDesignGuidanceSPD.pdf)

## 6. DELIVERY OF AFFORDABLE HOUSING OFF-SITE

### Commuted Sums in Lieu of Affordable Housing On-Site

- 6.1. Local Plan Policy HP5 states that affordable housing provision is expected to be made on-site. However, in exceptional circumstances where it can be robustly demonstrated that affordable housing cannot be delivered on-site a commuted sum for the Council to deliver off site affordable housing may be agreed.
- 6.2. Where this is the case, a S106 will be used to secure the contribution in addition to specifying phasing of payments if that is appropriate.
- 6.3. In the event that an applicant proposes to provide the required affordable housing on an alternative site in the borough which is within their ownership, this should be discussed with the Council at the earliest opportunity.

#### What is a commuted sum?

- 6.4. A commuted sum (or payment in lieu) is an amount of money, paid by an applicant to the Council. Paragraph 64 of the NPPF enables the Council to accept a commuted sum, towards the provision of affordable housing on an alternative site where it is not possible to incorporate affordable housing within a scheme.

#### What is the Council's approach to the use of commuted sums?

- 6.5. In line with national policy set out in the NPPF, Policy HP5 enables the Council to require commuted sums where it is robustly justified that provision cannot be made on site and where it contributes to the objective of mixed and balanced communities.
- 6.6. As such there are two scenarios in which the Council will accept a financial contribution in lieu of on-site provision. They are:
  1. Where the overall requirement results in a partial unit, and the applicant does not wish to round up to provide a whole unit of affordable housing on site, a contribution will be sought for the equivalent of the decimal place of the affordable housing requirement (e.g. where the requirement is 6.3 units, 6 units will be sought on site, and a contribution equivalent to the 0.3 of a unit will be agreed.
  2. Where detailed evidence (agreed with the Council) demonstrates provision on site is not achievable, a contribution will be sought for the entire value of the requirement.

#### How will the money be used?

- 6.7. The Council directly delivers affordable housing on its own sites. All contributions collected from either route identified above will be put towards the provision of or regeneration of Affordable Housing in the borough.
- 6.8. The principles applied in the collection and use of these payments are very similar to those used for other planning obligations. They will generally be

dealt with through a legal agreement (under S106) related to the land.

How will this be monitored?

- 6.9. Financial contributions in lieu of onsite affordable housing delivery will be defined in the S106 agreements. S106 agreements are monitored through the Council's Infrastructure Funding Statements<sup>24</sup> and Authority Monitoring Reports<sup>25</sup> which record the planning applications permitted where an affordable housing contribution financial obligation has been agreed. The AMR also reports on the annual delivery of affordable homes in the borough, identifying those delivered directly by the Council.

**How is the commuted sum calculated?**

- 6.10. Where robustly justified, the council may agree that an affordable housing contribution can be made as a cash payment. Such a payment is known as a commuted sum. The commuted sum may represent the full affordable housing contribution for a site or be a partial financial contribution which brings the overall provision up to the agreed amount of affordable housing for the site.
- 6.11. For example, a 40% affordable housing requirement on a site of 24 units is 9.6 affordable housing units, translating into 9 units provided on site, with the remaining 0.6 unit provided as a commuted sum. Having decided that the Council is willing to collect a commuted sum, it is important that there is a consistent and transparent mechanism for calculating the commuted sum to be collected. The Council's Commuted Sum Calculator provides this mechanism.
- 6.12. The Calculator does not assess whether or not the scheme can afford a particular amount of affordable housing i.e. that the scheme is viable. Its specific purpose is to calculate the commuted sum when the payment of such is deemed acceptable by the council.

Principles of the Calculator

- 6.13. The principle underlying the Calculator is that the developer of a scheme should be no worse or better off financially, whether they provide the affordable housing on-site or as a commuted sum.
- 6.14. If an applicant has concerns over the viability of a scheme and believes the scheme is unable to meet the policy requirements for affordable housing, they should discuss this with the Housing Team. Substitution of on-site provision with a financial contribution is not a mechanism for dealing with any justifiable viability concern.
- 6.15. The 'contribution' made by a developer as a commuted sum is the assessed difference in residual value between a 100% market housing scheme and a scheme with the policy requirement for affordable housing (or a lesser percentage where this is justified by viability considerations).
- 6.16. Residual value is the difference between the total scheme revenue (of the

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<sup>24</sup> [https://www.fareham.gov.uk/planning/local\\_plan/ifs.aspx](https://www.fareham.gov.uk/planning/local_plan/ifs.aspx)

<sup>25</sup> [https://www.fareham.gov.uk/planning/local\\_plan/amp.aspx](https://www.fareham.gov.uk/planning/local_plan/amp.aspx)

market and affordable housing) and the cost of the scheme (including a return to the developer). For the purposes of assessing a commuted sum, the price paid for a site is not part of the calculation.

- 6.17. The Calculator calculates the difference between the revenue for a market unit (less an allowance for the developer return and marketing fees) and the revenue for an equivalent affordable housing unit, at the relevant % of affordable housing.
- 6.18. Underlying the calculation is the premise that the scheme is viable for the % of affordable housing being tested. Where detailed evidence (agreed with the Council) demonstrates this is not achievable, the % of affordable housing sought should be adjusted before any calculation of a commuted sum.

#### Using the Calculator

- 6.19. The Calculator is an Excel based model available to view on the Council's website. The Council will provide developers with guidance on the Calculator, what data is required, and step by step instructions on how to use it.
- 6.20. The Calculator requires various pieces of data to calculate the commuted sum to be paid, including the number and type of dwellings in a scheme, their market value and affordable housing rents and a range of other variables used to assess the value of affordable housing units. The user can provide their own scheme-specific values or rely on default values already set up in the Calculator. The preferred approach is to use scheme-specific data whenever possible and only rely on the Calculator values when there is no scheme-specific information available.

## 7. EXCEPTION SITES AND SPECIALIST HOUSING

### Rural Exception Sites and Entry-Level Exception Sites

- 7.1. As set out in section 2, The Fareham Local Plan includes Policy HP6: Rural Exception Sites. Rural exception sites help to address crucial affordable housing needs of rural communities by enabling the development of small sites that would not normally be used for housing because the site's development is constrained by other Local Plan policies. Hence an exception is made to normal planning policy to address proven local affordable housing need. However, other planning issues such as site suitability, scale, design, etc. must still be considered and appropriately addressed. Rural exception sites are specifically for the purpose of providing affordable housing in perpetuity to address evidenced local need.
- 7.2. Entry-level exception sites help facilitate affordable housing provision on the edge of towns and villages aimed at first-time buyers or first-time renters based on low- or middle-income households. Entry-level exception sites should be adjacent to existing urban area boundaries as identified on the Local Plan Policies Map<sup>26</sup>.
- 7.3. In both cases, applicants are strongly encouraged to engage with the Council's Housing and Planning Teams during pre-application discussions when considering these types of development. Where a scheme is being proposed under the auspices of HP6, the developer will need to make it clear through an affordable housing statement how the scheme meets local need.

### Specialist Housing

#### Adaptable and Accessible Dwellings

- 7.4. Local Plan Policy HP7: Adaptable and Accessible Dwellings requires at least 15% of new dwellings to meet the requirements of M4(2) of the Building Regulations 2010. It is important that this proportion should be the same in both market and affordable units i.e. 15% of the affordable units should meet M4(2) standards.
- 7.5. The Council welcomes affordable units that have this degree of adaptability as it provides greater flexibility in the affordable housing stock and therefore it is important to note that **15% is a minimum**. Furthermore, Policy HP7 requires that on schemes of over 100 dwellings (gross), at least 2% of market housing and **5% of affordable housing should be provide as M4(3) units**. Applicants should engage with the Council's Housing Team during pre-application discussions to establish which affordable unit types and sizes are required as M4(2) and M4(3) to meet recognised housing need. Any such provision should be identified as part of the affordable housing schedule at application.

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26

<https://farehamcouncil.maps.arcgis.com/apps/webappviewer/index.html?id=2b98ddf208a14da582bc42d64869f11a>

### Older Persons Accommodation

- 7.6. There is also a need for Specialist Accommodation for older people which could include, but is not limited to, sheltered housing, extra care units, retirement living schemes, care homes and nursing homes. These types of Specialist Accommodation will typically be designed and available exclusively for older persons. Details of the local need can be found in the Council's Specialist Housing Needs Background Paper.<sup>27</sup>
- 7.7. They could include both private and affordable tenures (including Older Person Shared Ownership). The Council will support schemes for affordable specialist housing and applicants are strongly encouraged to engage with the Council's Housing Team during pre-application discussions to determine appropriate mix in terms of tenure split and any needs of those on the Council's housing register.
- 7.8. Specialist accommodation for older people being provided as affordable housing by a relevant body shall include as a minimum the following aspects:
- Meet either the optional requirement of M4(2) of the Building Regulations 2010, or optional requirement M4(3) of the Building Regulations 2010 (to be secured by Planning Condition); and
  - To be grouped together for ease of management and the potential provision of support services by the Registered Provider, or other recognised support services.
- 7.9. Older person accommodation should include some variation in property type and avoid being limited to 1 and 2-bedroom flats with limited outside space.

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<sup>27</sup>

[https://www.fareham.gov.uk/PDF/planning/local\\_plan/HOP003\\_Background\\_Paper\\_Specialist\\_Housing\\_Needs.pdf](https://www.fareham.gov.uk/PDF/planning/local_plan/HOP003_Background_Paper_Specialist_Housing_Needs.pdf)

## APPENDIX 1

### Local Plan Policies

#### Policy HP6: Exception Sites

The development of Rural Exception Sites will be permitted where:

- a) All dwellings are affordable (as defined in the NPPF); and
- b) The affordable delivery is not meeting the affordable housing need and the development is relative in scale to the shortfall; and
- c) The development is located adjacent to, and well related to, the existing urban area boundaries; and
- d) The affordable rent products will be brought forward by, and will be managed by, a not for profit social housing provider who is regulated by Homes England; and
- e) The affordable housing meets the local needs of the adjacent settlement.

The development of Entry-Level Exception Sites suitable for first time buyers (or those looking to rent their first home) will be permitted where:

- i. The site is adjacent to existing settlements; and
- ii. All dwellings are affordable (as defined in the NPPF), and a range of affordable tenure types, including those that are suitable for first-time renters or buyers are provided; and
- iii. The site is less than 1 hectare or relative in scale (does not exceed 5% of the size of the adjacent settlement); and
- iv. It can be demonstrated, based on an up to date local housing needs assessment, that the need for the housing proposed will not be met through the allocations in the Plan or development with extant planning permission.

#### Policy HP7: Adaptable and Accessible Dwellings

Development proposals for all new dwellings shall provide:

- a) At least 15% of all new dwellings at Category 2 standard; and
- b) On schemes of over 100 dwellings (gross), at least 2% of market housing and 5% of affordable housing shall be provided as Category 3 properties.

#### Policy D1: High Quality Design and Place Making

Development proposals and spaces will be of high quality, based on the principles of urban design and sustainability to ensure the creation of well designed, beautiful and safe quality places.

Development proposals will be permitted where compliance with the following key characteristics of high quality design, has been demonstrated:

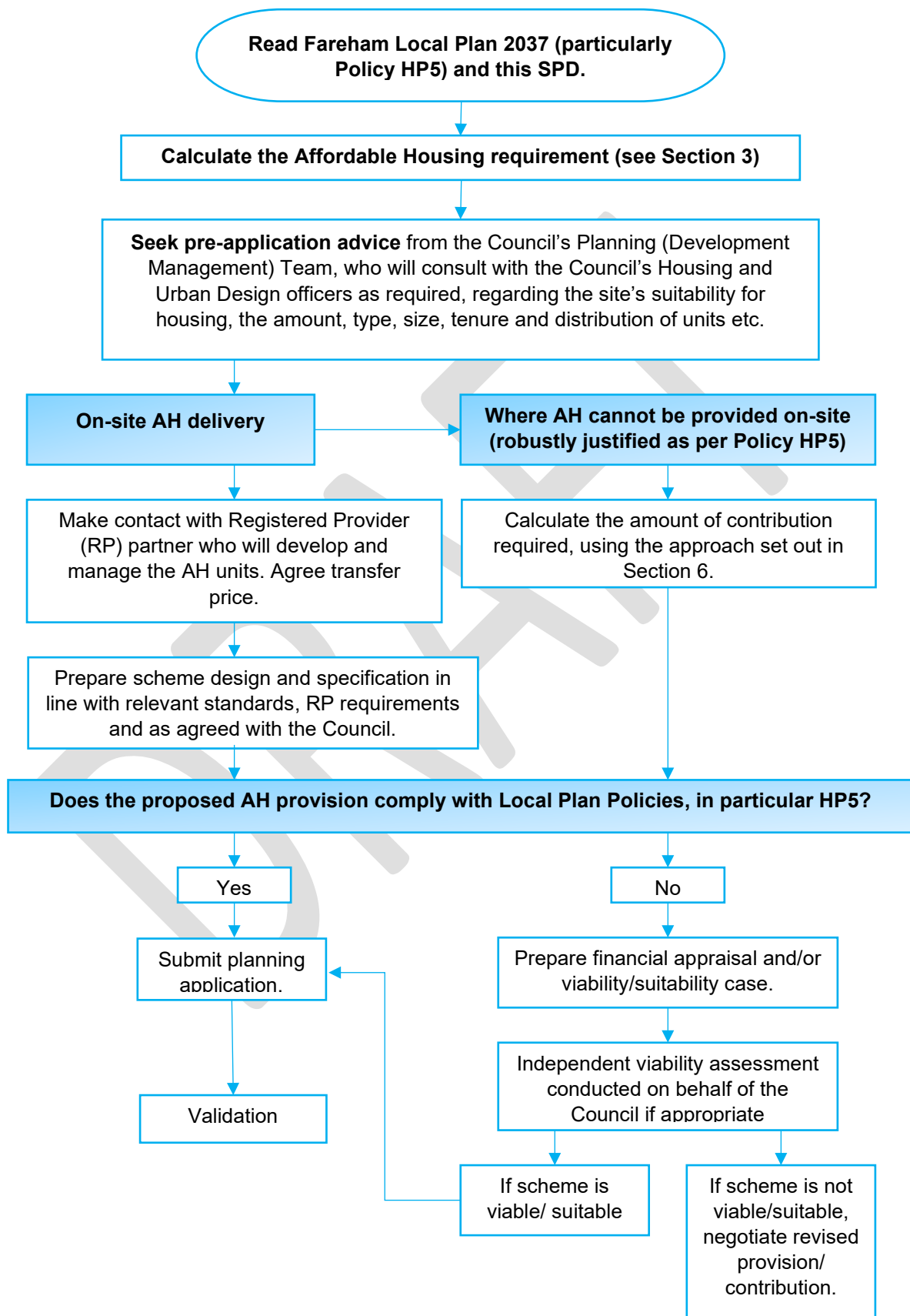
- i. Context - where proposals appropriately respond to the positive elements of local character, ecology, history, culture and heritage; and

- ii. Identity - where proposals create places that are attractive, memorable, distinctive and of strong character; and**
- iii. Built form - where proposals create a three-dimensional pattern or arrangement and scale of development blocks, streets, buildings and open spaces, that are coherent, attractive and walkable; and**
- iv. Movement - where proposals create attractive, safe and accessible corridors that incorporate green infrastructure and link with key services and facilities along existing and future desire lines, which promote social interaction and activity; and**
- v. Nature - where proposals positively integrate existing and new habitats and biodiversity within a coherent and well managed, connected structure; and**
- vi. Public spaces - where proposals create public spaces that are attractive, safe, accessible and provide a focus for social interaction, and promote healthy activity and well-being; and**
- vii. Uses - where proposals provide or are well related and connected with, a mix of uses that provide the day to day needs of users; and**
- viii. Homes and buildings - where proposals provide a variety of dwelling sizes and tenures, have sufficient space and are well related to public space; and**
- ix. Resources - where proposals reduce the use of natural resources, conserve and enhance and integrate habitats and ecosystems and are adaptable over time, minimising waste; and**
- x. Lifespan - where proposals are designed and constructed to create enduring high-quality buildings, spaces and places that are attractive and functional, which weather well and can be adapted to users' needs with efficient management and maintenance.**



## APPENDIX 2

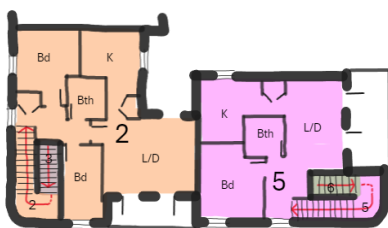
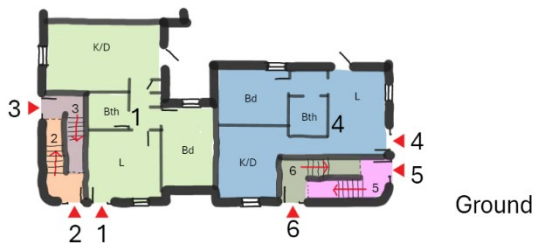
### Affordable housing process chart



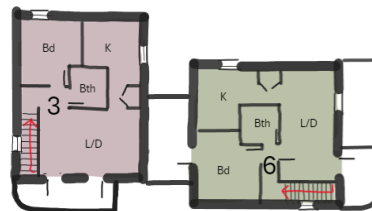
## APPENDIX 3

### Exemplar Scheme - Goldsmith Street, Norwich (Mikhail Riches Architects)

Goldsmith Street comprises a mix of terraced 2 storey houses bookended by apartment blocks of No 4 or 6 x 1 and 2 bed units. Each flat has its own front door from the street together with balcony spaces.



First



Second

#### Urban context

The development was delivered within a context of Victorian and mid/late C20th compact terraces and apartment blocks of 2,3 and 4 storeys.



- Terraced compact forms with limited frontages and small rear gardens.
- Tree lined unallocated on-street parking or in rear courts.
- Flatted blocks to corners for flexibility and visual interest.
- Balconies and/or roof terraces. Potential for small communal entrance space.

#### Sub-Urban context

This typology can be delivered within a more sub-urban context typical of Fareham Borough

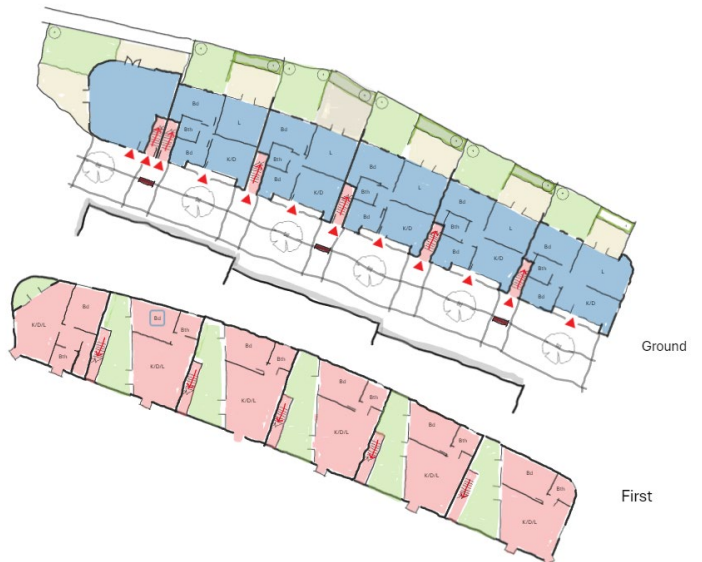


- Semi-detached and detached dwellings with occasional terrace forms.
- Frontage landscape and gardens of 1-5m.
- Tree lined unallocated on-street parking with on-plot dedicated parking to standard or in on-plot courts.
- Flatted blocks to corners for flexibility and visual interest, but not a requirement.
- Balconies and/or roof terraces with standard 25m<sup>2</sup>/unit communal garden space for flats.

## APPENDIX 4

### Exemplar Scheme - Duckworth Terrace, London (Peter Barber Architects)

Duckworth Terrace comprises a 2-storey terrace of 1 and 2 bed units within a car free social street. Each flat has its own front door from the street together with a rear garden (2 bed) and an upper roof terrace (1 bed).



#### Urban context

The development was delivered within a context of Victorian and early C20th compact terraces and mid/late C20th apartment and maisonette blocks of 3 and 4 storeys within spacious landscaped communal and private spaces.



- Terraced social; street with threshold frontage and small rear gardens for ground floor units.
- Unallocated on-street parking.
- End units address both streets.
- Roof terrace for upper apartment.
- No private communal space.

#### Sub-Urban context

This typology can be delivered within a more sub-urban context typical of Fareham Borough.



- Unit typology utilised as a corner block. Set back to building line with private gardens and frontage landscape.
- Allocated on-plot parking with visitor spaces on-street.
- Block turns corner to address both streets.
- Roof terrace for upper apartment.
- No private communal space, but potential for small semi private entrance space.

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**Appendix B****Screening Statement of the need for a Strategic Environmental Assessment (SEA) and Habitats Regulations Assessment (HRA) for the Fareham Borough Council Affordable Housing Supplementary Planning Document (SPD)****Introduction**

1. This screening statement has been prepared to determine whether the proposed Affordable Housing Supplementary Planning Document (SPD) should be subject to a Strategic Environmental Assessment (SEA) in accordance with the Environmental Assessment of Plans and Programmes Regulations 2004 (SEA Regulations).
2. The purpose of the Affordable Housing SPD is to aid the effective implementation of the Council's strategic planning objectives and the Affordable Housing policies in the Fareham Local Plan 2037. The relevant policies are:
  - HP5: Provision of Affordable Housing
  - HP6: Exception Sites
3. The SPD contains:
  - Policy context based upon the Fareham Local Plan 2037 regarding Affordable Housing;
  - Reference to the policy requirements for Affordable Housing and thresholds for developments;
  - Approaches and advice on:
    - Affordable housing in the planning process;
    - Design considerations for on-site affordable housing;
    - Commuted sums for Affordable Housing in lieu of on-site provision;
    - Exception sites.
4. The SPD provides guidance on how to implement policies that are material considerations in the determination of planning applications and inform Development Management decisions. The SPD provides further guidance to all parties seeking to comply with the Local Plan policies and will therefore be of particular use to developers and agents looking to bring forward development.

**Strategic Environmental Assessment – Regulatory Requirements**

5. The basis for Strategic Environmental Assessment legislation is the Environmental Assessment of Plans and Programmes Regulations 2004 (SEA Regulations) which was transposed from European Directive 2001/42/EC. Detailed guidance of these regulations can be found in the Government publication 'A Practical Guide to the Strategic Environmental Assessment Directive' (ODPM, 2005) and Paragraph 11-008 (Strategic Environmental Assessment and Sustainability Appraisal) of the Planning Practice Guidance (PPG). This states that "supplementary planning documents do not require sustainability appraisal but may in exceptional circumstances require a strategic environmental assessment if they are likely to have significant environmental effects that have not already been assessed during the preparation of the local plan".
6. Under the requirements of the Environmental Assessment of Plans and Programmes Regulations (2004), certain types of plans that set the framework for the consent of future development projects, must be subject to an environmental assessment.

7. The objective of a Strategic Environmental Assessment is to provide for a high level of protection of the environment and to contribute to the integration of environmental considerations into the preparation and adoption of plans and programmes with a view to promoting sustainable development.

### **The Strategic Environmental Appraisal Process**

8. The first stage of the process is for the Council to determine whether the SPD is likely to have significant effects on the environment. This screening process includes assessing the SPD against a set of criteria (as set out in Schedule 1 of the SEA Regulations). The results of this are set out in table 2 of Appendix 1 of this statement. The aim of this statement is therefore to provide sufficient information to demonstrate whether the SPD is likely to have significant environmental effects.
9. Where the Council determines that a SEA is not required, Regulation 9(3) of the SEA Regulations states that the Council must prepare a statement setting out the reasons for this determination. This statement is Fareham Borough Council's Regulation 9(3) statement. The Council has consulted the Environment Agency, Historic England and Natural England on this screening statement. Their responses are included at Appendix 2.

### **Habitats Regulations Assessment**

10. In addition to the SEA, the Council is required to consider a Habitats Regulations Assessment (HRA). HRA is the process used to determine whether the plan or project would have significant adverse effects on the integrity of an internationally designated site of nature conservation importance, known as European sites. The need for an HRA is set out within the Conservation of Habitats and Species Regulations 2010, which transposed EC Habitats Directive 92/43/EEC into UK law.
11. The Fareham Local Plan 2037 was subject to a comprehensive HRA: [HRA Update Report September 2022.pdf \(fareham.gov.uk\)](#)
12. The HRA screened out the policies listed in paragraph 2 of this assessment at an early stage, concluding that they were unlikely to have a significant effect on the integrity of European Sites. The summary of that can be found in appendix 2 of the HRA (linked above). As the purpose of this SPD is only to provide guidance and clarity on these policies, the Council has determined that a HRA is not required.

### **Conclusion**

13. Based on the screening process, it is the Council's opinion that the Affordable Housing SPD does not require a Strategic Environmental Assessment under the SEA regulations or an Appropriate Assessment under the Habitats Regulations. This is because there will be no significant environmental, social or economic effects arising from its implementation, as it seeks only to expand upon and provide guidance for the effective and consistent implementation of Local Plan policies.



## Appendix 1:

**Table 1: Establishing whether there is a need for an SEA (based on figure 2, ODPM guidance)**

Assessment Criteria	Yes/ no	Assessment
1. Is the PP subject to preparation and/or adoption by a national, regional or local authority OR prepared by an authority for adoption through a legislative procedure by Parliament or Government? (Art. 2 (a)).	Yes. Proceed to Q2	Supplementary Planning Documents are prepared by local planning authorities under the provisions of Regulations 11 to 16 of the Town and Country Planning (Local Planning) (England) Regulations 2012.
2. Is the PP required by legislative, regulatory or administrative provisions? (Art. 2 (a)).	Yes. Proceed to Q3	The SPD is consistent with and expands upon the Borough Council's Local Plan. It is therefore necessary to answer the following questions to determine further if an SEA is required.
3. Is the PP prepared for agriculture, forestry, fisheries, energy, industry, transport, water management, water management, telecommunications, tourism, town and country planning or land use, AND does it set a framework for future development consent of projects in Annexes I and II to the Environmental Impact Assessment Directive? (Art 3.2 (a))	No. Proceed to Q4	Whilst the SPD has been prepared for town and country planning purposes, it does not set policy or a framework as it only provides guidance on the policies within the Local Plan. The policies that the SPD supplements have been subject to SA/SEA.
4. Will the PP, in view of its likely effect on sites, require an assessment for future development under Article 6 or 7 of the Habitats Directive? (Art. 3.2 (b)).	No. Proceed to Q6	The policies that the SPD is supplementing have themselves been subject to Habitats Regulations Assessment. Refer to paragraph 12 in this document.
6. Does the PP set the framework for future development consent of projects (not just projects in Annexes to the EIA Directive)? (Art 3.4).	Yes. Proceed to Q8	The SPD provides further guidance to supplement policies related to developer contributions and infrastructure provision. The SPD does not allocate land and it does not set policy or a framework for future development, but it does provide guidance to policies in the local plan
8. Is it likely to have a significant effect on the environment? (Art. 3.5)	No	<b>Directive does not require SEA.</b>

**Table 2: Assessment of the likelihood of the Affordable Housing SPD having significant effects on the environment.**

<b>Significant effect criteria</b>	<b>Potential effects of the SPD</b>
<i>The characteristics of the plan having regard to:</i>	
(a) The degree to which the plan or programme sets a framework for projects and other activities, either with regard to the location, nature, size and operating conditions or by allocating resources;	The SPD provides more detail on the policies and principles established in the Fareham Local Plan 2037, which has been subject to comprehensive SA incorporating SEA. The purpose of the SPD is to provide guidance on the effective and consistent implementation of the relevant policies in paragraph 2. The policies in the SPD must not and do not conflict with those in the Local Plan and as such are subservient and supplemental to those in the Local Plan.
(b) The degree to which the plan or programme influences other plans and programmes including those in a hierarchy;	The purpose of the SPD is to supplement the Local Plan policies and sits below the Local Plan in terms of the Development Plan hierarchy.
(c) The relevance of the plan or programme for the integration of environmental considerations in particular with a view to promoting sustainable development;	The SPD is relevant in terms of promoting sustainable development as it seeks to ensure the effective and consistent implementation of infrastructure policies in the Local Plan, the aim of which is to provide better places for local communities.
(d) Environmental problems relevant to the plan or programme;	There are no environmental problems relevant to the SPD. This SPD will result in social and economic benefits through the effective and consistent implementation of infrastructure policies.
(e) The relevance of the plan or programme for implementation of Community legislation on the environment (e.g. plans and programmes linked to waste management or water protection).	The purpose of the SPD is to provide guidance on the effective and consistent implementation of infrastructure policies. The Fareham Local Plan 2037 contains other policies relating to these objectives.

<i>Characteristics of the effects likely having regard, in particular, to:</i>		
<b>SEA Directive Criteria</b>	<b>Response</b>	<b>Is there a likely significant environmental effect?</b>
(a) The probability, duration, frequency and reversibility of the effects;	The SPD is not expected to give rise to any significant environmental effects. The SPD seeks to ensure the effective and consistent implementation of infrastructure policies, which in themselves should	No



	ensure positive effects relating environmental impact.	
(b) The cumulative nature of the effects;	The SPD is not considered to have any significant cumulative effects.	No
(c) The transboundary nature if the effects;	The SPD is not expected to give rise to any significant transboundary environmental effects. However, where strategic sites are in close proximity to neighbouring settlements, the provision of infrastructure will assist in mitigating any impacts from development and delivering sustainable new developments for residents from a wider area as well as from within Fareham's communities.	No
(d) The risks to human health or the environment (e.g. due to accidents);	There are no anticipated effects of the SPD on human health.	No
(e) The magnitude and spatial extent of the effects (geographical area and size of the population likely to be affected);	The effective and consistent implementation of infrastructure policies will have positive benefits for all Fareham residents and those who wish to move to Fareham.	No
(f) The value and vulnerability of the area likely to be affected due to – (i) Special natural characteristics or cultural heritage; (ii) Exceeded environmental quality standards or limit values; or (iii) Intensive land use;	The SPD is not anticipated to adversely affect any special natural characteristic or cultural heritage. Nor would the SPD be expected to lead to the exceedance of environmental standards or promote intensive land use. Matters relating to environmental standards and land use are contained in the Fareham Local Plan 2037.	No
(g) The effects on areas or landscapes which have a recognised national, Community or international protection status.	The SPD is not expected to have any adverse effect on areas with national, community or international protection.	No
<b>Part 2 Overall Conclusion</b>	<b>No Likely Significant Environmental Effect</b>	

## Appendix 2: Statutory Consultee Responses

### Natural England:

Date: 12th January 2024  
Our ref: 461955  
Your ref: Affordable Housing SPD SEA/HRA Screening Assessments



Ms Emma Younger  
Senior Planner (Strategy)  
Fareham Borough Council  
Civic Offices  
Civic Way  
Hampshire  
PO16 7AZ

Hombeam House  
Crewe Business Park  
Electra Way  
Crewe  
Cheshire  
CW1 6GJ

T 0300 060 3900

BY EMAIL ONLY - [EYounger@Fareham.Gov.UK](mailto:EYounger@Fareham.Gov.UK)

Dear Ms Younger

**draft Fareham Borough Council Affordable Housing Supplementary Planning Document (SPD)  
SEA/HRA Screening Assessments**

Thank you for your consultation request on the above dated and received by Natural England on 21st December 2023.

Natural England is a non-departmental public body. Our statutory purpose is to ensure that the natural environment is conserved, enhanced, and managed for the benefit of present and future generations, thereby contributing to sustainable development.

#### **Strategic Environmental Assessment**

It is our advice, on the basis of the material supplied with the consultation, that, in so far as our strategic environmental interests (including but not limited to statutory designated sites, landscapes and protected species, geology and soils) are concerned, that there are unlikely to be significant environmental effects from the proposed plan.

**Natural England have no comments to make on the SEA/HRA however we agree with your opinion that the Affordable Housing SPD does not require a Strategic Environmental Assessment**

We have checked our records and based on the information provided, we can confirm that in our view the proposals contained within the plan will not have significant effects on sensitive sites that Natural England has a statutory duty to protect.

We are not aware of significant populations of protected species which are likely to be affected by the policies / proposals within the plan. It remains the case, however, that the responsible authority should provide information supporting this screening decision, sufficient to assess whether protected species are likely to be affected.

Notwithstanding this advice, Natural England does not routinely maintain locally specific data on all potential environmental assets. As a result the responsible authority should raise environmental issues that we have not identified on local or national biodiversity action plan species and/or habitats, local wildlife sites or local landscape character, with its own ecological and/or landscape advisers, local record centre, recording society or wildlife body on the local landscape and biodiversity receptors that may be affected by this plan, before determining whether an SA/SEA is necessary.

Please note that Natural England reserves the right to provide further comments on the environmental assessment of the plan beyond this SEA/SA screening stage, should the responsible authority seek our views on the scoping or environmental report stages.  
This includes any third party appeal against any screening decision you may make.

For any new consultations, or to provide further information on this consultation please send your correspondences to [consultations@naturalengland.org.uk](mailto:consultations@naturalengland.org.uk)

Yours sincerely

Sharon Jenkins  
Operations Delivery  
Consultations Team  
Natural England

## **Environment Agency:**

**From:** [Lax, Laura](#)  
**To:** [Emma Younger](#)  
**Subject:** RE: Fareham Borough Council SPD SEA/HRA Screening Assessments  
**Date:** 15 January 2024 13:58:01

Having considered issues within our remit I can confirm that the Environment Agency agree with Fareham BC's screening opinion that the Affordable Housing SPD does not require a SEA under the SEA Regulations. We would defer to Natural England in relation to the Appropriate Assessment under the Habitats Regulations.

Kind regards  
Laura

Laura Lax  
Sustainable Places  
Solent and South Downs

## Historic England:



FAO: Emma Younger  
Senior Planner (Strategy)  
Fareham Borough Council

PL00794964

[EYounger@Fareham.Gov.UK](mailto:EYounger@Fareham.Gov.UK)  
by email only

12 January 2024

Dear Emma

**Strategic Environmental Assessment (SEA) screening statement for a draft supplementary planning document (SPD) on affordable housing**

Thank you for consulting Historic England on the above screening statement.

In terms of our area of interest, given the nature of the SPD, we concur with your assessment that the document is unlikely to result in significant environmental effects and will simply provide additional guidance on existing policies contained within an adopted Development Plan Document which has already been subject to a Sustainability Appraisal/SEA. As a result, we endorse the Authority's conclusions that it is not necessary to undertake SEA of this particular SPD.

The views of the other statutory consultation bodies should be taken into account before the overall decision on the need for an SEA is made.

Please let me know if you have any queries.

Yours sincerely

Guy Robinson, BSc, MRTPI  
Historic Environment Planning Adviser  
Development Advice – London and the South East Region  
[guy.robinson@historicengland.org.uk](mailto:guy.robinson@historicengland.org.uk)



Historic England, Cannon Bridge House, 25 Dowgate Hill, London EC4R 2YA  
Telephone 0370 333 0607 [HistoricEngland.org.uk](http://HistoricEngland.org.uk)

Please note that Historic England operates an access to information policy.

Correspondence or information which you send us may therefore become publicly available.



# Equality Impact Assessment Screening

Appendix C

## EQUALITY IMPACT ASSESSMENT – INITIAL SCREENING

Initial screening needs to take place for all new/revised Council policies. The word ‘policy’, in this context, includes the different things that the Council does. It includes any policy, procedure or practice - both in employment and service delivery. It also includes proposals for restructuring, redundancies and changes to service provision. This stage must be completed at the earliest opportunity to determine whether it is necessary to undertake an EIA for this activity.

Name of Policy:	Affordable Housing Supplementary Planning Document (SPD)
Lead Officer (responsible for assessment):	Emma Younger
Department:	Planning (Strategy)
Date Initial Screening Completed:	December 2023

### **(a) What is the policy trying to achieve?**

*i.e. What is the aim/purpose of the policy? Is it affected by external drivers for change? What outcomes do we want to achieve from the policy? How will the policy be put into practice?*

The SPD is a supplementary document, in support of policy contained in the Local Plan and in support of national policy. It does not set new policy, but rather gives clarity on how to interpret existing policy and sets out what information is needed by applicants in order to help them to deliver development.

### **(b) Who are its main beneficiaries? i.e. who will be affected by the policy?**

It is primarily aimed at developers and people interested in understanding the requirements of Affordable Housing provision on proposed housing developments. Developers will be helped by the clarity provided in the SPD as to how policies in the Local Plan should be considered and implemented.

### **(c) Is this assessment informed by any information or background data?**

*i.e. consultations, complaints, applications received, allocations/take-up, satisfaction rates, performance indicators, access audits, census data, benchmarking, workforce profile etc.*

Before adoption, the draft SPD will be subject to public consultation for 6 weeks in February and March 2024.

### **(d) Does this policy have the potential to cause a positive or negative impact on different groups in the community, on the grounds of any of the protected characteristics:**

Age	No
Disability	No
Gender Reassignment	No
Marriage & Civil Partnership	No
Pregnancy & Maternity	No

Race	No
Religion or Belief	No
Sex	No
Sexual Orientation	No

**Please explain any impact identified:**

*i.e. What do you already know about equality impact or need? Is there any evidence that there is a higher or lower take-up by particular groups? Have there been any demographic changes or trends locally? Are there any barriers to accessing the policy or service?*

The Fareham Local Plan 2037 was adopted in April 2023 and the policies contained in plan were subject to Equality Impact Assessment (EqIA) throughout the preparation of the Local Plan, including Policy HP5 Provision of Affordable Housing and HP6 Exception Sites. The EqIA for the Local Plan concluded that ‘overall the Local Plan policies in the adopted version of the Local Plan have been designed to improve the relevant protected characteristics where possible and to have a neutral impact.

It is not anticipated that there will be any direct impact on equality issues related to the nine protected characteristics as a result of the policies and development proposed in the Fareham Local Plan 2037.’ As the SPD is not setting out new policy but is providing guidance on the implementation of the adopted Local Plan policies, the SPD will therefore not have any further impact than those already assessed.

- (e) Does the policy affect service users or the wider community?** NO
- (f) Does the policy have a significant effect on how services are delivered?** NO
- (g) Will it have a significant effect on how other organisations operate?** NO
- (h) Does it involve a significant commitment of resources?** NO
- (i) Does it relate to an area where there are known inequalities, e.g. disabled people’s access to public transport etc?** NO

If you have answered YES to any of the questions above, then it is necessary to proceed with a full equality impact assessment (EIA).





# FAREHAM

## BOROUGH COUNCIL

### **Presentation to Planning and Development Scrutiny Panel**

**Date:** 31 January 2024  
**Report of:** Head of Planning  
**Subject:** PLANNING STRATEGY UPDATES

#### **SUMMARY**

The presentation will provide an opportunity to communicate to members of the Panel any relevant updates pertaining to Planning Strategy matters, including the recent publication of the National Planning Policy Framework.

#### **RECOMMENDATION**

It is RECOMMENDED that Members note the contents of the presentation.



# FAREHAM

## BOROUGH COUNCIL

### **Report to Planning and Development Scrutiny Panel**

**Date:** 31 January 2024  
**Report of:** Director of Planning and Regeneration  
**Subject:** EXECUTIVE BUSINESS

#### **SUMMARY**

One of the key functions of this Scrutiny Panel is to hold the Executive Portfolio Holder and senior Officers to account in delivery of the service and the Improvement Actions identified in the Council's Corporate Priorities and Corporate Vision.

Members are therefore invited to consider the items of business which fall under the remit of the Planning and Development Portfolio and have been dealt with by the Executive since the last meeting of the Panel. This also includes any decisions taken by individual Executive Members.

The relevant notices for decisions taken are attached for consideration.

#### **RECOMMENDATION**

It is recommended that Members consider the items of business discharged by the Executive since the last meeting of the Panel and make any comments or raise any questions for clarification.

