



Appendix B

Self and Custom Build Housing Supplementary Planning Document

October 2023

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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 The purpose of this SPD is to enable the successful delivery of self-build and custom build homes through planning applications, with specific detail on:
 - the adopted Fareham Local Plan 2037 and the policy for self and custom build homes.
 - how a range of self and custom build homes can be delivered in Fareham.
 - meeting the Council's requirements for a successful self-build or custom build planning application.
 - the marketing of plots for self and custom build homes in Fareham.
- 1.3 The SPD provides guidance and advice on self and custom housebuilding in Fareham and will be of particular relevance to planners, self-build plot providers and developers building more than 40 dwellings and anyone who is considering building their own home. It is essential that developers of larger sites consider how the requirements for self and custom build plots will be brought forward at an early stage.
- 1.4 This SPD must be considered in line with the wider planning policy context, including:
 - The Self-build and Custom Housebuilding Act 2015,
 - Housing and Planning Act 2016,
 - National Design Guidance (2021),
 - National Model Design Code (2021),
 - The National Planning Policy Framework February 2021 (NPPF),
 - Planning Practice Guidance (PPG)
 - The Fareham Local Plan (2037)
 - The Council's other Supplementary Planning Documents such as the Residential Design SPD.
- 1.5 This document applies to the whole of Fareham Borough excluding Welborne.
- 1.6 The SPD is a 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 self-build and custom housing.
- 1.7 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 or by telephone on 01329 824601.

2. WHAT IS SELF-BUILD AND CUSTOM BUILD HOUSING?

- 2.1 **'Self-build'** is the practice of creating an individual home for yourself. The self-builder's input into this process may vary, some choose a traditional DIY route where they manage the design and construction process and undertake a fair proportion of the actual building work. Many people self-build by commissioning a developer to build to their design or by choosing a package route, also known as a system-build or kit home.
- 2.2 **'Custom Build'** housing is where the home is custom built to the individuals' specification on a multi-plot site where neighbours will be like-minded people who have also commissioned their home.
- 2.3 Generally, if a site is suitable for housing, it is suitable for self and custom build housing.
- 2.4 The Self-build and Custom Housebuilding Act 2015¹ (as amended by the Housing and Planning Act 2016²) provides a legal definition of self-build and custom housebuilding:

'...the building or completion by-
(a) individuals,
(b) associations of individuals, or
(c) persons working with or for individuals or associations of individuals of houses to be occupied as homes by those individuals.
But it does not include the building of a house on a plot acquired from a person who builds the house wholly or mainly to plans or specifications decided or offered by that person.'

- 2.5 The Act does not distinguish between self-build and custom housebuilding and provides that both are where an individual, an association of individuals, or persons working with or for individuals or associations of individuals, build or complete houses to be occupied as homes by those individuals.³
- 2.6 Both self-build and custom housebuilding require significant input from the homeowner in the design process of the home. Guidance states that *'In considering whether a home is a self-build or custom build home, relevant authorities must be satisfied that the initial owner of the home will have primary input into its final design and layout.'* The Council does not consider that speculative market housing delivered by a developer, off-plan sales, or circumstances where developers give clients limited fit-out choices comply with the legislation and accompanying Government guidance. Such development will not be considered self-build for planning purposes, neither will the development benefit from CIL relief. This is in accordance with the

¹ <https://www.legislation.gov.uk/ukpga/2015/17/contents/enacted>

² <https://www.legislation.gov.uk/ukpga/2016/22/contents/enacted>

³ PPG para 016 Reference ID: 57-016-20210208 - <https://www.gov.uk/guidance/self-build-and-custom-housebuilding>

legal definition (above) as set out in the Self-build and Custom Housebuilding Act 2015 and the Community Infrastructure Levy Regulations 2010.

- 2.7 For a self or custom build development to claim exemption from CIL, the dwelling must be the principal residence of the owner for at least the following three years. More information can be found in section 6 of this SPD.
- 2.8 Appendix 1 sets out the different types of development which are considered to be self and custom build housing.

3. PLANNING POLICY CONTEXT

Self and Custom Build Housing National Planning Policy and Guidance

- 3.1 The National Planning Policy Framework February 2021⁴ (NPPF) sets out that the planning system should contribute to sustainable development through the delivery of a wide choice of high-quality homes. NPPF paragraph 60 states that: *‘it is important that a sufficient amount and variety of land can come forward where it is needed, that the needs of groups with specific housing requirements are addressed and that land with permission is developed.’*
- 3.2 In paragraph 62 of the NPPF regarding delivering a sufficient supply of homes, reference is made to people wishing to build their own homes: *‘Within this context, the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies (including, but not limited to, those who require affordable housing, families with children, older people, students, people with disabilities, service families, travellers, people who rent their homes and people wishing to commission or build their own homes).’*
- 3.3 The associated NPPF footnote 28 states: *‘Under section 1 of the Self-build and Custom Housebuilding Act 2015, local authorities are required to keep a register of those seeking to acquire serviced plots in the area for their own self-build and custom house building. They are also subject to duties under sections 2 and 2A of the Act to have regard to this and to give enough suitable development permissions to meet the identified demand. Self and custom-build properties could provide market or affordable housing.’*
- 3.4 The glossary of the NPPF also defines such housing as follows: *‘Self-build and custom-build housing: Housing built by an individual, a group of individuals, or persons working with or for them, to be occupied by that individual. Such housing can be either market or affordable housing. A legal definition, for the purpose of applying the Self-build and Custom Housebuilding Act 2015 (as amended), is contained in section 1(A1) and (A2) of that Act.’*
- 3.5 Further guidance is provided in the Government’s Planning Practice Guidance (PPG), available at: <https://www.gov.uk/guidance/self-build-and-custom-housebuilding>.
- 3.6 National Design Guidance (2019)⁵ forms part of the Government’s collection of planning practice guidance. Paragraph 118 advises: *‘Well-designed larger scale developments include a range of tenures. They also promote a variety of development models, such as community-led development, self and custom build and build to rent. This supports a diversity of delivery, by small as well as large developers. It also helps to create rich, diverse settlements.’*

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https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1005759/NPPF_July_2021.pdf

⁵ <https://www.gov.uk/government/publications/national-design-guide>

- 3.7 In 2021, the government announced the Self and Custom Build Action Plan in which the Prime Minister commissioned a review of the custom and self-build sector to establish a plan to scale up self and custom housebuilding. Richard Bacon MP published his review findings in August 2021 and in June 2022, the Government published their response, reinforcing their commitment to scale-up the self and custom build housing sector in England and outlining their support for several of the review’s recommendations. This includes establishing a new Homes England unit for Self-Commissioned Homes Delivery, making changes to legislation through the future Levelling Up and Regeneration Bill to ensure more land comes forward for self and custom build housing, and reviewing the NPPF to support delivery.

“The government strongly believes that self and custom build housing can play a crucial role – as part of a wider package of measures – in securing greater diversity in the housing market, increasing overall supply and helping to deliver the homes people want.” Stuart Andrew MP – Housing Minister

Local Policy

- 3.8 The Fareham Local Plan 2037 sets out the vision and strategy for future development in Fareham to 2037. One of the key elements of the Local Plan’s vision is that *‘the Borough will accommodate development to address the need for new homes and employment space in Fareham Borough. The new housing will address the particular needs in the Borough, such as our growing housing need and an ageing population and creating attractive places to live.’*
- 3.9 To achieve the Local Plan vision, several strategic priorities have been identified, which includes: *‘Provide new housing which incorporates a mix of tenure, size and type to meet the Borough’s needs and enable accommodation for all, this includes addressing the specific needs of different groups in the community, including the elderly and people with disabilities.’*
- 3.10 Policy HP9: Self and Custom Build Homes sets out the Council’s positive approach to ensuring the sufficient delivery of land for people wishing to build their own homes to meet the need identified by the Council’s self-build register. The policy requires developers to supply at least 10% of the total dwellings on residential and mixed–use sites of over 40 dwellings, for sale to self and custom builders.

Policy HP9: Self and Custom Build Homes

Proposals that provide for self and/or custom build homes within the Urban Area boundary, as defined on the policies map, will be supported in principle.

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.

Such provision shall:

- a) be provided as serviced plots; and**
- b) ideally be provided in grouped plots; and**
- c) ensure design parameters are in place to provide a framework that takes account of the existing and emerging built form; and**
- d) ensure design parameters are in place that ensure no significant detrimental impact on the amenity of existing, and potential neighbouring, self or custom build plots arises.**

Plots which are marketed appropriately but not sold within 12 months of initial promotion, may be developed for housing other than as self and/or custom build homes.

Sites that appear to have been subdivided for the purposes of application submission so as to avoid the 40-dwelling threshold, or sites that feature as part of cluster of adjoining development sites, shall be considered cumulatively and if progressed on an individual basis 10% of dwellings shall be provided in accordance with this policy.

Where a site's size and density make it unsuitable for self/custom build provision, exemption from the policy will be considered on an individual basis. For example, where the sites' housing type or mix would not meet the needs identified by the Council's Self and Custom Build Register.

For sites where housing delivery will come through multiple phased applications, each phase will be expected to meet the 10% policy requirement unless there is clear evidence of lower demand. In such instances the delivery requirement for self and custom build homes will be considered on an individual basis.

3.11 In addition to the provision of self and custom build dwellings as part of larger housing schemes in HP9, individual schemes for the redevelopment of an existing dwelling or for the provision of further development within the curtilage of an existing dwelling for the purposes of self or custom build development is further provided for by Policy HP2: New Small-Scale Residential Development Outside the Urban Area which seeks to support individual self-builders and

small and medium sized house builders who are seeking to provide small developments outside of the urban area but which are proposed in sustainable locations and incorporate good design.

Policy HP2: New Small-Scale Residential Development Outside the Urban Areas

New small-scale housing development outside the Urban Area boundary, as shown on the Policies map, will be permitted where:

- 1) The site is within or adjacent to existing areas of housing; or**
- 2) The site is well related to the settlement boundary; and**
- 3) The site is within reasonable walking distance to a good bus service route or a train station as well as safe walking and cycling routes that connect to a local, district or town centre; and**

- 4) It comprises development that does not adversely affect the predominant development form of the area, taking particular account of:**
 - a. building line and scale of adjacent dwellings;**
 - b. plot size and proportion,**
 - c. site coverage/ratio,**
 - d. space between dwellings,**
 - e. landscape and views through to countryside beyond; and**

- 5) It comprises development:**
 - a. Of not more than 4 units; and**
 - b. Where the design and external appearance of each dwelling is demonstrably different, unless a terrace or semi-detached form is appropriate; and**
 - c. That does not extend the settlement frontage.**

3.12 The Council recognises that there may be further opportunities for self and custom build on sites which fall between those caught by the 10% requirement in HP9 and small-scale development of up to 4 units in HP2. These medium sized sites, which may not be of interest to national housebuilders, could provide a valuable source of self and custom build plots and landowners and developers may wish to consider such opportunities on suitable, sustainable sites. Although sites of this size would not be caught by the 10% requirements of HP9, the guidance in section 3 of this SPD may be useful in considering how to plan for such a site.

4. INDIVIDUAL SELF AND CUSTOM BUILD DEVELOPMENTS

- 4.1 Evidence gathered through the Council's self and custom build register indicates that for those considering some form of self or custom build project, 87% are considering building their own home on an individual plot.
- 4.2 In the Council's self and custom build register survey, respondents indicated that the biggest barriers to achieving their aspirations were finding the right plot and the complexity of the process (including planning).

Finding a Plot

- 4.3 The Council's self and custom build register does not provide a matching service in respect of plots, instead this register provides evidence of the need for self and custom build provision in the Borough, informing Local Plan policy and helping developers and landowners offer the right type of self and custom build provision. However, when the Council are made aware of plot opportunities, this information is passed on to those on the register who wish to receive it. Local estate agents are a good point of contact for information on the sale of plots, in addition, there are a number of websites which provide a plot search facility.

Local Plan Policy requirements

- 4.4 Policy HP9: Self and Custom Build Homes sets out that 'Proposals that provide for self and/or custom build homes within the Urban Area boundary, as defined on the policies map, will be supported in principle.' In principle support will be given where a site proposed for a self or custom build home meets requirements set out in other chapters and policies in the Fareham Local Plan 2037 including:
- The Development Strategy – development should be located in urban areas. Where a potential self and custom build site is located outside of the urban area, Policy HP2: New Small-Scale Residential Development Outside the Urban Areas should be considered.
 - Design – buildings should be of high-quality design, creating quality spaces. The Council's Residential Design SPD provides guidance on what makes good design. In addition, the National Design Guide is a useful tool.
 - Natural Environment – development should not have an adverse impact on nature conservation or ecology and should secure appropriate biodiversity gains and/or enhancement.
 - Historic Environment – development should seek to conserve and enhance the historic environment.

- 4.5 For potential self or custom build proposals located outside the urban area boundary, the requirements of Policy HP2: New Small-Scale Residential Development Outside the Urban Area will be of importance.

Community Infrastructure Levy

- 4.6 It is important that potential self and custom homebuilders familiarise themselves with the Community Infrastructure Levy exemption process. Section 6 provides an overview of how self and custom builders can obtain exemption from the requirement to pay the Community Infrastructure Levy.

The Planning Process

- 4.7 Submitting a planning application can be daunting however there is lots of help available to guide applicants through the process. In addition to this SPD, information and advice about the requirements for submitting a planning application is available on the Council's website at http://www.fareham.gov.uk/planning/applications_and_advice/intro.aspx.

This provides links to information on pre-application advice which can be sought from the Council's planning officers as well as to The Planning Portal which provides an additional source of guidance and information about the planning system and how to apply for planning permission.

5. DELIVERING PLOTS ON LARGE RESIDENTIAL AND MIXED-USE DEVELOPMENT

Local Plan Policy Requirements and Local Need

- 5.1 As set out in Policy HP9, *'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.'*
- 5.2 The Borough's need is identified through the number of entries on the Council's self and custom build register⁶.
- 5.3 Where the total number of plots to be provided includes part of a whole number, if the part of the whole number is 0.5 or more, the number of self and custom build plots to be provided shall be rounded up and where the part of the whole number is less than 0.5, the number of self and custom build plots to be provided shall be rounded down.
- 5.4 The plots must be construction-ready parcels of land, with outline planning permission, laid out and ready for building, with access and utilities/services provided to the plot boundary (further information on serviced plots can be found in paragraphs 5.5-5.10).

Serviced Plots and Utilities

- 5.5 The definition of a serviced plot of land as set out in section 5(1) of the Self-build and Custom Housebuilding Act 2015, means a plot of land that:
 - (a) has access to a public highway and has connections for electricity, water, and wastewater, or
 - (b) can be provided with those things in specified circumstances or within a specified period.
- 5.6 Serviced plots are construction-ready parcels of land with planning permission, laid out and ready for build commencement with access and utilities/ services provided to the plot boundary.
- 5.7 The Council expects plots to be sold with outline planning permission, the basic infrastructure and minimum service connections to qualify as a "Serviced Plot" (as defined above).
- 5.8 Self and custom build plots should be provided in a serviced condition with all the reasonably necessary service connections and a safe, suitable highway connection provided to the plot. Plots will be required to be provided in a 'clean' condition, i.e. uncontaminated land which is evidenced through soil testing and clear of rubble or other such material.
- 5.9 The installation of utilities usually includes the most common: water and sewage connections, electricity, gas and telecommunications. Each utility is

⁶ s2A(a) of the Self-build and Custom Housebuilding Act 2015

normally provided to a disconnected chamber on or just within the boundary of each plot (for example electricity connections provided to fuse boxes on stakes and water connections provided to a manhole in the pavement).

- 5.10 Connections should be clearly identified and careful consideration of the locations of the connections is required so that they are kept out of the way of construction traffic. The service connections should be set out in the Plot Passport as shown in the example in Appendix 3.

Plot Mix

- 5.11 Developers will be expected to provide a mix of sizes of serviced plot which help to meet the range of demand and affordability identified by the Council's self and custom build register. This is to ensure that self and custom build plots secured through Policy HP9 cater to a variety of aspiring self and custom builders, including first-time buyers, middle-income earners and downsizers. Large plots will inevitably have a higher sales value than smaller ones, however where there is evidence of demand for low-cost plots, developments will need to ensure the provision of some lower cost, compact-sized plots.
- 5.12 To ensure that pre-application enquiries and planning applications which involve self and custom build housing consider this provision during the early stages, it is advised that developers engage with the Council at the earliest opportunity to clarify the local demand requirements for serviced plots. Developers may find it helpful to access data on local demand earlier in the process to assist in their site selection process, prior to the pre-application stage.
- 5.13 Information relating to local demand, including preferred locations, plot sizes and house types, is available on the Council's website at https://www.fareham.gov.uk/planning/local_plan/selfbuild.aspx or by contacting the Council's Planning Strategy Team. Obtaining this information in the early stages can help to ensure an optimal layout is achieved on the proposed development.

Plot Location and Size

- 5.14 Plot locations should be carefully selected and agreed with the Council to ensure that they can be serviced in an agreed specified period in the construction programme and are attractive to prospective self and custom house builders. Plot sizes should be realistic, for example supported by evidence from the self and custom build register, and viable to make them attractive propositions. They should ideally be clustered together, easily serviceable and in an attractive location not encumbered by significant constraints such as trees, slopes and free from flood risks. There should not be services or rights of way crossing the land and the boundaries should be clearly marked out. Plots should benefit from easy direct access to facilitate the delivery of bulky materials.

Phasing

- 5.15 Where a development is phased, the self and custom build homes requirement should be determined at each phase and delivered on a defined parcel of land, allowing self and custom build delivery alongside traditional developer-led housing. The market response to purchasing serviced plots at each phase can inform the decision about delivery on subsequent phases.
- 5.16 The delivery of self and custom build homes within each phase will be expected to be compliant with Policy HP9 of the Local Plan unless there is clear market indication of lower demand for plots from sources such as marketing and delivery in earlier phases and information from the Council's self and custom build register. It is preferable that self-build plots are delivered in the early phases of the development once the initial infrastructure and services have been installed on site as this allows building to commence on the self-build plots at an early stage and can help to avoid any potential disturbance of neighbouring residents occupying market homes. However, the Council will take into account the proposed location of the plots within the development and the phasing of the surrounding development when considering appropriate phasing.
- 5.17 Due to the potential complexity of phasing, including how the phasing of the site affects CIL exemption and/or payments, it is advisable that developers undertake early engagement with Development Management Case officers. For more information on CIL, see section 6 of this SPD.
- 5.18 It is important that developers consider the timing of the servicing and provision of the plots early on as this is an important aspect of their delivery. On larger sites, this will be dealt with through a self-build Phasing Plan, and through conditions attached to the planning permission. The granting of planning permission will include conditions to ensure the number of plots required are delivered in accordance with an agreed Phasing Plan and Delivery Statement. Further conditions will secure submission and approval of a Design Code, individual Plot Passports, and a Marketing Strategy prior to submission of any Reserved Matters application.
- 5.19 Full details of the requirements for submitting a planning application can be found on the Council's website: https://www.fareham.gov.uk/planning/applications_and_advice/howtoapply.aspx.

Affordable Housing

- 5.20 The Affordable Housing requirement as set out in Policy HP5 – Provision of Affordable Housing should be calculated on 100% of the unit numbers, including the self/custom build element.
- 5.21 Self-build and Custom housebuilding are often regarded as a market homes product, however they can be delivered as Affordable dwellings as long as they meet the definition of Affordable Housing in Annex 2 of the NPPF 2021.

- 5.22 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. Developers 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.
- 5.23 Alternatively, self/custom build plots could meet or contribute toward satisfying both policies, through the provision of some Affordable self/custom build plots. The Council consider that custom build is generally the most appropriate way to achieve this. 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.
- 5.24 The following is an example of how Affordable Housing and self/custom build could be addressed separately on a development:

Greenfield site proposing a housing development of 120 dwellings:

- 40% (48 No. dwellings) to be provided as Affordable Housing (tenure mix as per Policy HP5, size mix as informed by discussions with Fareham Housing)
- 10% (12 No. dwellings) to be provided as self/custom build plots (as per Policy HP9)
- 60 No. dwellings to be provided as open market housing.

- 5.25 Further guidance on the delivery of Affordable Housing and how it relates to self and custom build will be available in the Council's Affordable Housing SPD.

Application Requirements

- 5.26 For planning applications which are required to provide 10% serviced plots for self and custom build, the Council will expect developers to submit details of the number of plots together with a parameter plan identifying the precise plot boundaries, indicative location of the dwellings within each plot, a Delivery Statement, Phasing Plan, Marketing Strategy and where appropriate, Design Codes and Plot Passports. These requirements are identified on the Council's validation checklist and should be included with the submission of the planning application. Further details are set out below:

Delivery Statement

- 5.27 A Delivery Statement should set out the programme for delivering the plots to a serviced and construction-ready condition including details of access, servicing, infrastructure, subdivision of plots, boundary treatments and how the delivery of plots will meet the definition of self-build and custom housebuilding and the definition of serviced plots (as referred to in section 5

of the Self-build and Custom Housebuilding Act 2015). Appendix 4 provides a template to assist in the drafting of a Delivery Statement.

Phasing Plan

- 5.28 Where the development is to be phased, a Phasing Plan will be required showing the location of the self-build plots including any access works to be approved by the Council prior to commencement. The Phasing Plan should show each plot for self and custom build (each plot phased separately) and any necessary access works.

Marketing Strategy

- 5.29 A Marketing Strategy is required in accordance with Policy HP9's supporting text. The Marketing Strategy should be submitted to the Council and agreed prior to the commencement of any phase which includes self/custom-build plots. The strategy should set out how plots will be marketed through an active local campaign, such as promotion on social media and relevant websites and should include consideration of targeted marketing to potential self-builders and local groups, alongside roadside marketing boards. Where Design Codes and Plot Passports will be used, these should form part of the marketing material. An information/marketing pack should also be provided to the Council to be in turn provided to all individuals on the Council's self and custom build register who have opted to receive such information. A list of Marketing Strategy requirements is included in Appendix 2.

Design Code

- 5.30 A Design Code is useful where large sites are likely to have areas with differing design requirements.
- 5.31 A Design Code is a set of written and illustrated rules that establish the design parameters of a particular development, prepared in accordance with the Council's Residential Design SPD and Policy D1. Design Codes for self and custom build developments are likely to be site specific and vary between locations. They can also be area wide within a larger development site. A Design Code may be appropriate to ensure high quality urban design, and to provide clarity at marketing stage.
- 5.32 The Design Code should be informed by an appropriate contextual assessment and be accompanied by a Vision Statement setting out the design philosophy for the proposal and how it integrates with the character and visual appearance of the locality and/or wider development.
- 5.33 The following table provides an example of the parameters that a Design Code may address, in discussion with Council Officers.

Design Parameters	Example considerations
Density	Site coverage/plot ratio, dwellings per hectare, higher/lower density phases/areas.
Street network	Street and building pattern and connectivity.
Views and vistas and outlook	Relationship to heritage assets, topography, corridors and backdrops.
Landscape	Purpose and function, trees: species, numbers, placements.
Streetscape and building lines	External materials and boundary treatments, eaves and rooflines, corner treatments, focal points, set-backs, boundary treatments. Frequency, pattern, and scale of building features such as windows, doors, porches, balconies and other architectural features, including material and colour.
Building and active frontages	Set back distance; front gardens and threshold space, active frontage purpose and orientation.
Building Types	Detached, semi-detached, terraced / town house, flats.
Plot Form	Proportion, plot size (m2), plot width and depth, minimum garden size and separation space between, maximum proportion of plot that may be developed; parameters of dwelling position on plot, minimum distances from boundaries.
Building Form and orientation	Storey heights, building mass, building orientation, position on plot, frontage, and outlook.
Parking Standards	Location (on-street, on-plot parking, courtyard parking) materials, overlooking, lighting, cycle parking and electric vehicle charging facilities.
Waste Facilities	Location and design of refuse and recycling bin storage, and servicing.

Table 1: Design Code example considerations

Plot Passports

- 5.34 Plot Passports are simple summaries of the design parameters for each plot capturing the relevant information from the Design Code, planning permission and Delivery Statement.
- 5.35 Plot Passports act as a key reference point for prospective purchasers and should form part of the marketing material available for each self and custom build plot to help private homebuilders to understand what they can build on a plot. Reserved Matters applications from self-builders which fall within the plot passport guidance can be processed in less time and can help speed up the planning process.
- 5.36 Each passport should clearly show as a minimum the plot location, back-to-back distances, permissible building lines, scale, servicing, and utilities, building height restrictions, plot size and Gross Internal Area parameters, proximity to neighbouring buildings, developable footprint, boundary treatments, parking and cycle storage, and side space requirements.

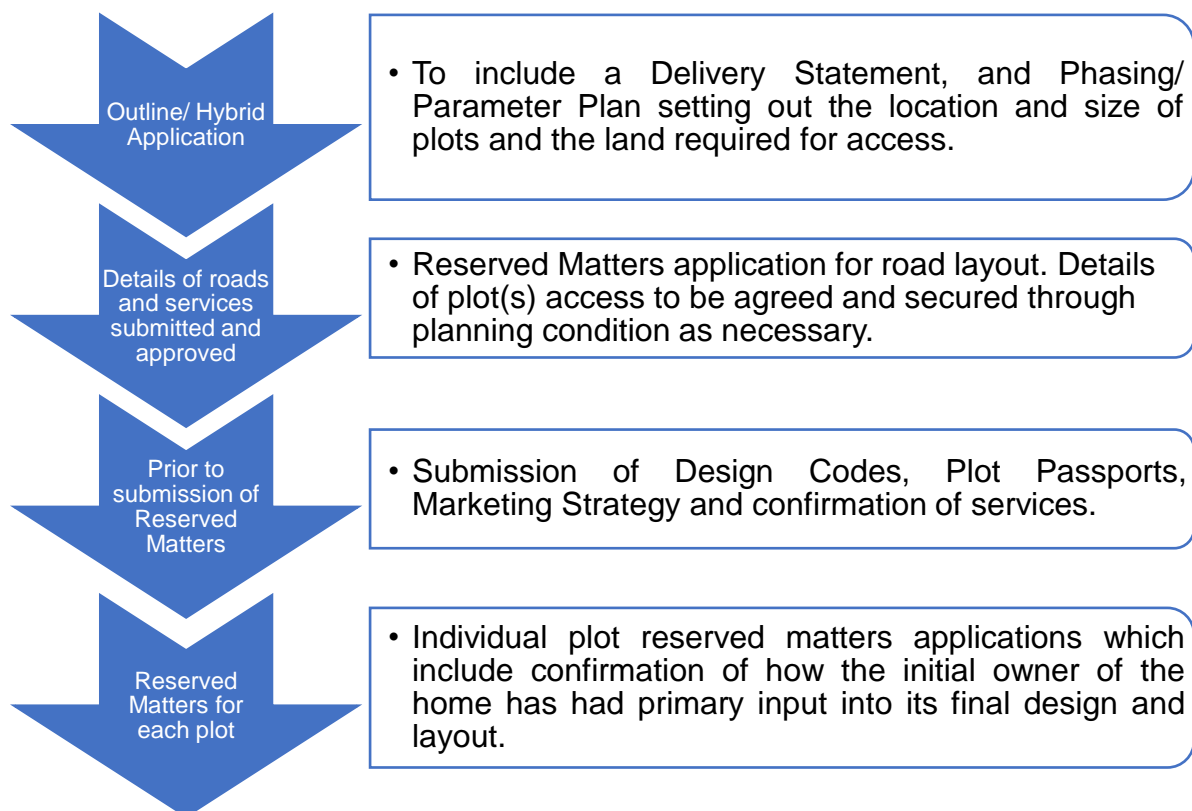
5.37 Passports should be clear about the number of dwellings that can be built on a plot (generally only one) as well as car parking and access location etc. The choice of finishing materials, fenestration and roof shape is usually left to the plot owner, subject to the Council's Design SPD and any relevant area or site wide Design Codes covered by the encompassing planning application.

5.38 An example of a Plot Passport is included in Appendix 3.

Successful Applications

5.39 Where applications are approved which include self and custom build homes, the requirements for the delivery such as phasing, Plot Passports, Design Codes, marketing, and provision of services will be set out in planning conditions.

5.40 The following diagram sets out the recommended approach for the submission of planning applications and the delivery of self and custom build homes on larger developments of over 40 dwellings which required to deliver self or custom build homes in accordance with Policy HP9:



6. COMMUNITY INFRASTRUCTURE LEVY (CIL) EXEMPTIONS AND SELF-BUILD

- 6.1 The Community Infrastructure Levy (CIL) was introduced in 2010 and is a tool for local Councils to help raise funds from developers to deliver infrastructure, such as new schools, open space, or public transport. It is a charge per square metre levied on new development such as new homes to fund infrastructure. Fareham adopted CIL in April 2013. Full details of Fareham's CIL can be found on the Council's website at https://www.fareham.gov.uk/planning/local_plan/cil.aspx.
- 6.2 As set out in the Community Infrastructure Levy Regulations 2010 and PPG⁷, self and custom homebuilders can apply for exemption or relief from the CIL where the relevant criteria are met, and the correct process is followed. It is important that prospective self and custom homebuilders investigate and understand the process that must be followed in order to qualify for the exemption or relief from CIL at an early stage.
- 6.3 For a self or custom build development to claim exemption from CIL, the self/custom builder must own the property and occupy it as their principal residence for a minimum of 3 years after the work is completed. If the owner wants to sell or let out the self or custom build property before the 3-year occupancy limit expires, they must notify the Council and the levy then becomes payable in full.
- 6.4 Further CIL guidance and the forms required are available on The Planning Portal at <https://www.planningportal.co.uk/planning/policy-and-legislation/CIL/download-the-forms>.

⁷ <https://www.gov.uk/guidance/community-infrastructure-levy#para082>

APPENDIX 1

Types of Self and Custom Build Housing

Self and custom build housing can include single detached homes on small plots, family homes on larger plots, larger infill developments, regenerative opportunities, community self-build projects, terraced properties, and apartments. Self and custom building can be described as any instance when a person is involved in some way in the production of their new home. Self and custom build are not prescriptive or restrictive, there are degrees of self-build and custom build, as described below:

Self-Build

Self-build housing is where people often physically build their own home, sometimes with help from sub-contractors. However, the level of involvement can vary greatly from undertaking all the building work themselves, project management of the design and construction, to purchase of the site and appointment of a contractor. The following are some examples of self-build projects:

One-off home

The owner manages the design and construction process, including obtaining planning permission and undertakes all or a proportion of the building work too.

Contractor-built one-off home

The owner manages the design process, including obtaining planning permission and then hires a contractor to complete all the construction work or the owner may manage the build and hire sub-contractors to complete specific tasks. The owner might undertake some of the simple tasks, such as decorating.

Kit/modular/package-build home

The owner finds the plot of land then selects a kit home from a kit home manufacturer. The owner obtains planning permission, and the kit home manufacturer then supplies and builds the house. The owner might complete some of the fitting out work.

Community-led housing (CLH)

Schemes involve groups of local people building homes for themselves with external support and managing the process collectively. Individual self-build is not regarded as community-led housing.

Supported community self-build group

This type of project is often organised by a social landlord, a local authority, a community land trust, or the Community Self Build Agency⁸ (CSBA), and this approach tends to suit people on lower incomes who like the idea of someone coordinating the group on their behalf.

⁸ <https://www.spatialagency.net/database/community.self.build.agency>

Custom Build

Custom Building is a way for people to commission their own home. Custom build plots are generally located on a multi-plot site where neighbours will be like-minded people who have also commissioned their home. It is a quicker and simpler route to achieving a bespoke home, as the process of finding land, securing planning permission and installing services are taken care of. Custom build homes are tailored to an individual's specification, but the construction is managed and completed by a developer. This is a more hands off approach but still offers the opportunity of a unique home that suits the private home builder's needs, lifestyle, and design preferences. Custom build falls into three main types: serviced plots, shell homes or customisable turnkey. In each route, a developer or enabler will be involved to a lesser or greater degree.

The serviced plot

The serviced plot will have planning permission and infrastructure already in place. Planning may be outline with a Design Code or what is known as a 'Plot Passport' which enables the custom builder to get detailed planning permission more quickly than usual. It may also have a detailed planning permission in place.

The shell

This is a wind and water-tight home with no internal fixtures or fittings. You will need to arrange for all the trades yourself to complete. Sometimes this is also called 'self-finish' which may mean more of the internal works have already been done.

The customisable turnkey

Serviced plots are marketed directly to individual private homebuilders along with a design and build contract for a completed custom home. This option provides a complete, bespoke service to meet the customer's need, including designing the home, sourcing the materials, arranging labour and the build to completion.

Other forms of 'self-finish' Custom Build houses where the dwelling is not built or commissioned by the occupant may not be considered by the Council to be true self or custom build and are also not recognised by the Community Infrastructure Levy (CIL) regulations. (See section 4 for information on CIL).

APPENDIX 2: Marketing Strategy

The Council expect that a robust Marketing Strategy is devised to ensure that information regarding the plots available reach potential purchasers and that the information included is clear and easy to understand.

The following list sets out the Council's requirements for a Marketing Strategy:

- 1 Marketing agent's contact details
- 2 High quality downloadable and printable sales brochure
- 3 An appropriate Design Code for the site
- 4 An appropriate Plot Passport for each plot
- 5 Plot valuations (provided by an experienced local agent)
- 6 Rules of the build/draft purchase agreements
- 7 Evidence of mortgage availability (how information which will be available to prospective purchasers)
- 8 The media and PR marketing plan (including details of all websites and portals upon which the plots will be listed)
- 9 On-site marketing (to include sales board at site entrance and appropriate marketing within on-site marketing suite)
- 10 The plot viewing process (to demonstrate how the plots will be demarcated and can be accessed)
- 11 A monitoring method statement (setting out how information on plot sales will be monitored and fed back to the Council on a quarterly basis)

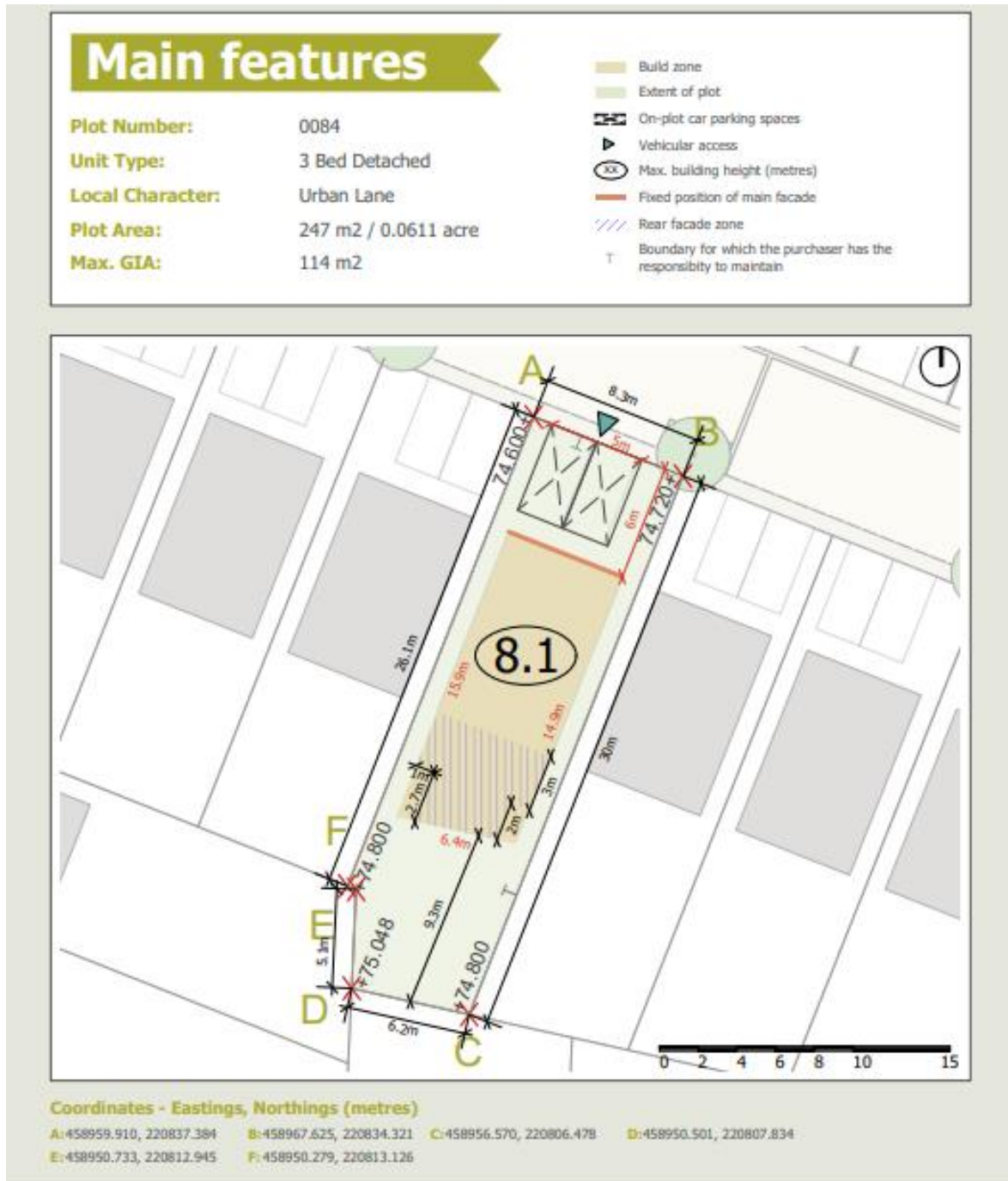
The Marketing Strategy can include more information than set out above, for example CGI images promoting the development or any further details of the development which the developer considers appropriate.

The Council will seek confirmation from the developer that marketing packs can be shared with the Council's self and custom build register.

APPENDIX 3

Example Plot Passport

Extract of a Plot Passport from Graven Hill Village Development Company Ltd



Rules of your build

- 1 Prior to development commencing, you must apply to the Local Planning Authority for a determination as to whether your design complies with the site Masterplan and Design Code. Forms are available from Local Planning Authority and must be accompanied by a plan showing the site and details of the proposed development. The Local Planning Authority must respond within 28 days, otherwise you can proceed.
- 2 Your home must be built within the 'build zone' and not exceed the max. permissible Gross Internal Area (GIA) stated above for construction above ground. In addition to the above area, a further 40% of the max. permissible GIA can be constructed below ground for a basement. The footprint of your home does not need to fill the entire 'build zone' & can be positioned anywhere within it. See below for GIA definition.
- 3 No temporary buildings or caravans are allowed on your plot. Prior to Completion, you shall not occupy your home for residential purposes or allow your home to be occupied for residential purposes.
- 4 No works or storage of materials may be undertaken outside the curtilage of your plot without permission from the relevant approving authority either GHVDC, Highways authority or the District Council as applicable.
- 5 All the rear walls of your building must be positioned within the hatched area of the build zone. Should either neighbouring plot have received either confirmation of compliance or planning permission, then any part of your home that would:
 - i) have more than a single storey; and ii) be within 2 metres of the boundary with a neighbouring home with confirmation of compliance or planning permission; then that must not extend beyond the rear wall of the neighbouring home by more than 3 metres.
- 6 The Principal Elevation of your home must front a highway.
- 7 This plot is for one detached unit with a max. of 3 bedrooms. The merging & subdivision of this plot is not permitted.
- 8 Prior to development the Plot Purchaser (as client) must appoint a Principal Designer as required under the 2015 Construction Design and Management regulations.
- 9 Any upper-floor window that is on a side elevation and less than 1.7m above the floor and faces onto a neighbouring house must be:-
 - (i) obscure-glazed (ii) non-opening
- 10 A minimum area of 50% of the plot frontage (the area between the highway and your front wall) must be permeable (i.e. grass / shrubs / gravel etc.). On the remaining area any hard surface to be provided on land between a wall forming the principal elevation of the home and the highway must either be made of porous materials, or provision made to direct run-off water from the hard surface to a permeable or porous area or surface within the curtilage of the home.
- 11 Unit Completion must take place within 24 months of the Completion of Sales Contract. See below for Unit Completion definition.
- 12 Your home must be no more than 8.1m as the maximum building height. This equates to approximately 2 storeys. The maximum building height means the height of your home when measured from ground level of the plot to the top of the highest part of the roof excluding any external chimneys, flues, soil or vent pipes or other structures for renewable energy generation.
- 13 The height of any external chimney, flue, soil or vent pipe, or other structure for renewable energy generation, must not exceed the highest part of the roof of the home by 1 metre or more.
- 14 Provision for the secure storage of min. 2 bicycles must be demonstrated in the design. Storage for 3 no. 240 litre wheeled bins (59w x 107h x 74d (cm)) for recycling, garden and residual waste should also be shown and must not be visible from road.
- 15 2 car parking spaces (vehicle bays) must be provided on the plot and be a minimum of 2.5m x 5.5m in size. The position of parking bays is to your discretion. However, the position of vehicular access is fixed and must be located as shown on the Plot Plan overleaf. The minimum internal dimensions for a single car garage is 3.0m x 6.0m.

- 16 Front boundaries to be maximum 1.1m high. Front boundary means any boundary which is or would be forward of the principal elevation of your home. Side/rear boundaries to public areas to be maximum 1.5m high with 0.3m trellis over. Side/rear boundaries to private areas to be maximum 1.8m high. Any material/colour permitted.
- 17 The majority of the main facade(s) of your home must be constructed on the line shown. Bay windows must not protrude more than 1.5m beyond this line.
- 18 Terraces, balconies and raised platforms above ground level are not permitted where they would extend beyond a wall forming a side elevation or any wall forming a rear elevation of your home.
- 19 The T bars shown on the Plot Plan indicate the boundaries to your plot for which you have the responsibility to maintain.

Performance and Sustainability Requirement:

Thermal element U-values; at least:	Walls: U = 0.15 W/m ² K, Ground Floor: U = 0.15 W/m ² K, Roof: U = 0.15 W/m ² K
Thermal bridges; meet one of the following standards:	(i) Use Accredited Construction Details, provided by the Government's planning portal website. An overview can be downloaded from www.planningportal.gov.uk . In particular at: http://www.planningportal.gov.uk/buildingregulations/app-overdocuments/part1/technicaldocuments/accd (ii) Achieve the Association of Environmentally Conscious Builders (AECB) Gold or Silver Standard details as a minimum to achieve $\psi = 0.08$ W/m ² K. (iii) Improve on the Accredited Construction Details to achieve a maximum $\psi = 0.08$ W/m ² K.
Window U-value and g-value (Glazing & Frames combined); at least:	U = 1.4 W/m ² K Range for solar gain factor (g-value): g = 0.50 - 0.70
Air Leakage rate	3m ³ /hr/m ² @ 50 Pa test pressure
Mechanical ventilation with heat recovery where specified:	Electrical efficiency ≥ 1.5 W/la Heat recovery efficiency ≥ 70%
Overheating risk	Consider design strategies that minimise the risk of summertime overheating risk. As a minimum comply with Building Regulations Part 1, Standards Assessment Procedure (SAP) Appendix F, or equivalent assessment method to achieve 'low' or 'medium' risk of overheating.
Electrical lighting	Minimum 75% of fixed lighting to be low energy (such as compact fluorescents or LEDs)

Definitions

Home

Home refers to a dwelling house or building which does not include a building containing 1 or more flats or a flat contained in such a building.

Gross Internal Area (GIA)

The Gross Internal Area means the total enclosed internal floor area of your home measured within the external walls taking each floor into account and excluding the thickness of the external walls. The GIA of your home also includes integral garages and conservatories.

Principal Elevation

Is the elevation of your home that faces the vehicular access to your plot.

Completion

Unit Completion shall be deemed to be achieved on the date of the earliest of the following being issued in respect of your home; i) the date of completion notice for Council Tax purpose in accordance with schedule 4a of the Local Government Finance Act 1988 and section 17 of the Local Government Act 1992 or ii) the date of the building regulations completion certificate in accordance with section 17 of building regulations or if earlier the date on which any latent defects insurer issues the policy cover note in respect of the building works.


Main features


Foundation Type: **Strip or Trenchfill**

Foul Water MH: **E:458961.932, N:220835.294
IL:73.300**

Surface Water MH: **E:458963.325, N:220834.737
IL:73.400**

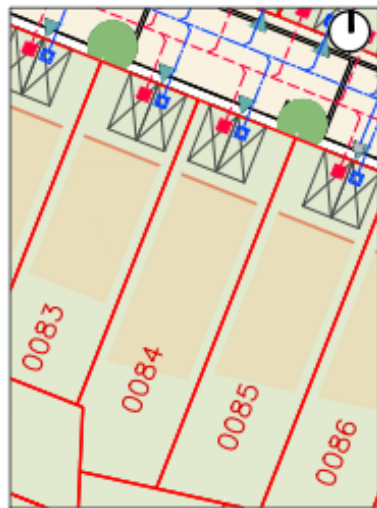
Key

 = Surface Water Disconnecting Manhole

 = Foul Water Disconnecting Manhole

MH = Disconnection Manhole

Manhole Coordinates are E-Eastings, N-Northings (metres),
IL = Invert Level (m-AOD)



Utility supply features

Electricity

230V Single Phase, 50Hz AC
100A/23KVA Supply Rating Max

Gas

25mm PE LP Pipe, 30KW Supply Rating Max.

Water

25mm ALPE Pipe with Meter, Stop Valve and Double Check Valve Standpipe.
Min Pressure 6m Head, Approx

Telecoms

Fibre Service

Key

Electricity Supply

Gas Supply

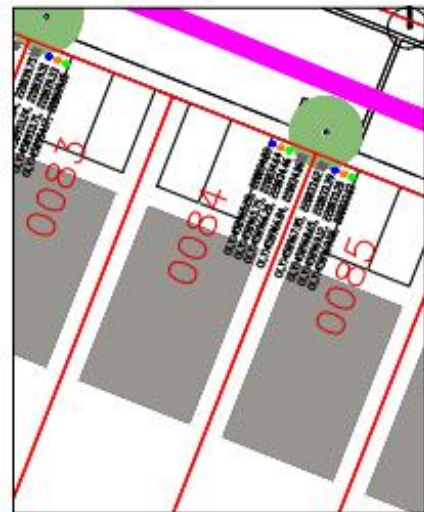
Water Supply

Telecoms Supply

Multi Utility Distribution Network

Co-ordinates

Co-ordinates indicate services intake position within site boundary



Plot Boundary Service Connections

1 Electricity

The electricity supply terminates in a ground mounted enclosure, just inside plot boundary, housing a 100A fuse cut-out, a 100A DP RCBO, with space for the provision of a small distribution board and meter. MPAN number will be supplied to allow the purchaser to arrange for a meter to be installed. (refer to 'Arranging for your meter' section)

2 Gas

The gas supply will require extension directly from the gas main in the road to the meter position in a built in or wall mounted meter box once the meter box has been installed on the building. The service pipe must be laid in a straight line between the connection to the main and the meter position. The proposed service pipe location is shown within the diagram above, any changes to this position must be provided to GTC as part of the Golden Brick design. Any subsequent variation to this location may incur additional cost to the self-build purchaser.

3 Water

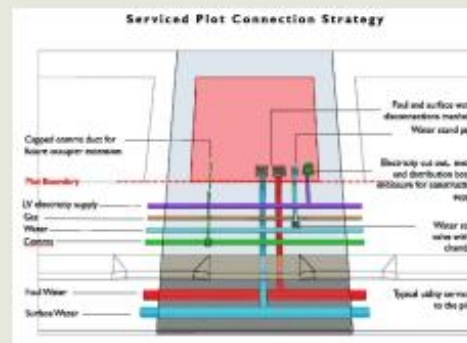
The water supply terminates at a double check valve and standpipe, just inside plot boundary, with meter and stop valve chamber in footway.

4 Telecoms

The telecoms provision terminates with a cable duct, at the plot boundary.

5 Drainage

Refer to 'Drainage' under separate passport.



APPENDIX 4

Delivery Statement Template

The Delivery Statement should be prepared to demonstrate how self-build plots and/or custom-build homes will be delivered onsite to meet the requirements of the Self-build and Custom Housebuilding Act 2015 (as amended by the Housing and Planning Act 2016).

The self-build plots/custom build homes must comply with Fareham Local Plan 2037 Policy HP9 – Self and Custom Build Homes and be delivered to an acceptable standard in the interests of the character and visual amenity of the area.

Aim of this template

This template is designed for developers to use to aid in setting out the contents of their Delivery Statement, or to simply respond to the questions as part of their submission. This document includes a number of criteria which need to be covered in the submission of proposals involving self and custom-build housing, including windfall sites or sites caught by Policy HP9 of the Fareham Local Plan 2037, which requires developers to provide at least 10% of the total dwellings on residential and mixed-use sites of over 40 dwellings. The criteria are designed to prompt the developer to consider matters, such as, how self/custom build projects will be brought forward (i.e. which model), where the plots will be located, how do they meet the definition of self or custom build, and so on.

1) What model will be followed in order to deliver self and custom-build housing?

Models

a) Sell plots to private homebuilders: Developer/landowner to provide building plots for self and custom-build. The plots are serviced, delivered, and marketed by the developer (with the principle of planning permission already established) directly to individual private homebuilders through a reputable estate agent and to persons registered on the Council's self-build register. Private homebuilders are responsible for designing and building or commissioning the building of their home.

b) Shell Homes: Developer/landowner construct the home to a weatherproof structural shell stage, the design of which can be tailored to the homeowner's requirements in accordance with the planning permission already established. The shell homes are delivered with services and marketed to individual private homeowners for them to complete the internal build and finishes. The exterior of the shell is to be completed in accordance with the approved Design Code.

c) Turnkey: Serviced plots are marketed directly to individual private homebuilders along with a design and build contract for a completed custom home to provide genuine bespoke and individual design to meet the customers need. These architect-led homes will offer a complete service and will include designing the home, sourcing the materials, arranging labour and the build to completion.

d) Sell land to Enabler: Developer/landowner to sell the self-build land to a third party such as a self-build enabler who will be responsible for servicing, delivering, and marketing the plots directly to individual private homebuilders through a reputable estate agent and to persons registered on the Council's self-build register. The self-build enabler may sell the plots to private homebuilders to design and build or commission their own home, they may also provide design and build contracts to meet the private homebuilders' individual design.

e) Partnership with Enabler: Developer works with a third party such as a self-build enabler to provide serviced building plots for self or custom-building. The plots are delivered and sold by the third party or developer (with the principle of planning permission already established) directly to individual private homebuilders through a reputable estate agent and to persons registered on the Council's self-build register. The self-build enabler may sell the plots to private homebuilders to design and build or commission their own home, they may also provide design and build contracts to meet the private homebuilders' individual design.

2) How does the proposed model fulfil the Self-build and Custom Housebuilding Act's (2015) definition of self-build and custom housebuilding?

Self & Custom Build Definition

The Self-build and Custom Housebuilding Act 2015 defines self-build and custom housebuilding as, '*the building or completion by:*

- a) *Individuals*
- b) *Associations of individuals, or*
- c) *Persons working with or for individuals or associations of individuals, of houses to be occupied as homes by those individuals, but does not include the building of a house on a plot acquired from a person who builds the house wholly or mainly to plans or specifications decided or offered by that person'.*

3) How will the Self or Custom Build Plots be phased? Please provide a proposed Phasing Plan.

Phasing

On larger sites, the Council will expect the early delivery of parcels of self-build plots. The Council will work with developers to understand any challenges to the early phasing and release of the self-build element of developments. It is important that developers consider early on the timing of the servicing and provision of the plots as this is an important aspect of their delivery. This will be dealt with via planning conditions or S106 Agreement.

4) Where will the plots be located? Please attached a proposed layout plan.

Location

Plots should be carefully selected to ensure that they can be serviced in an agreed specified period in the construction programme and are attractive to prospective self and custom house builders.

Plot sizes should be realistic to make them attractive propositions, they should be clustered together, easily serviceable and in an attractive location not encumbered by significant constraints such as trees, slopes and free from flood risks. There should not be services or rights of way crossing the land and the boundaries should be clearly marked out. Plots should benefit from easy access directly to the plot to facilitate the delivery of bulky materials.

5) Who will be responsible for connecting to or extending the utilities to each home?

Serviced Plots

A serviced plot of land means a plot to which all reasonably necessary service connections have been provided to the boundary including being accessible from a public highway and utility services to adoptable standards by the relevant statutory undertaker.

Installing utilities: there are usually four common utility connections; water and sewage connections, electricity, gas and telecoms. Each utility is normally provided to a disconnected chamber on or just within the boundary of each plot (for example electricity connections provided to fuse boxes on stakes and water connections provided to a manhole in the pavement). Connections should be clearly identified, and labels should not use shorthand. Careful consideration of the locations of the connections is required so that they are kept out of the way of construction traffic.

6) What fences or boundary treatments will be required and who is responsible for installing them (and by when)?

7) What remediation is required for each plot and how will this be delivered?

8) Will there be any shared maintenance areas or communal areas and who will be responsible for this?

9) Access roads: At what point will the surface course of the access road be laid?

10) What obligation is there to complete works to the access road (mortgage providers for serviced plots may require evidence of the landowner's obligation to complete the works so it may be necessary to sell the plots with a copy of the infrastructure contract)?

11) Please describe the proposed estimated timing of the servicing and provision of the self-build plots.

12) Will private self-builders be required to provide a bond payment to the master developer to cover any damage to public areas the development?

Bond Payments

Bond payments can be required from plot purchasers to ensure that any damage to the road and kerbs during construction can be recouped, the bond can be extended to cover the whole self-build site, for example to repair accidental damage. Bonds can encourage honesty, as everyone's money is collectively at risk for any liabilities by individuals during construction and therefore assist both parties. The requirements and value of any bonds should be reasonable with very clear terms and conditions to include when they can be spent, how much is required, how expenditure is agreed and when it is returnable. Clear guidance for the self-builder is required to set these conditions out.

13) Please provide details of the Design Code for the self-build plots.

Design Codes

National policy and guidance proactively encourage and sets the framework for the use of Design Codes, including their use for private homebuilding projects to clearly set out what form of development is preapproved in response to an agreed design vision for a site. This will ensure that individually designed homes will fit into the surrounding area. Design Codes can thus play an important role on private homebuilding sites. They reduce risk, provide certainty, drive up design quality and give the private homebuyer the flexibility to design their own home by permitting freedom of design with some high-level rules. Design Codes are particularly useful for larger multi-plot developments and/or self and custom build schemes that may impact on more 'design' sensitive locations such as conservation areas or the setting of listed buildings. They should not generally be overly prescriptive and should allow for design variation, creativity, innovation, and originality. The amount of prescription will vary according to the sensitivity of the site. They should specify what is mandatory and what is optional.

Where possible they should be style neutral so they can deliver contemporary or traditional architecture and they should allow for advanced methods of construction. Design Codes should consist of written and graphic rules that establish, with some precision, the two- and three-dimensional design elements of a proposed development. Key design considerations typically focus on the site/plot and the acceptable form of development (for example scale, massing, height, build line & layout, boundary treatments and landscaping). Codes can define process considerations (for example how construction traffic will be controlled, plant and material storage).

14) Please provide details of your Plot Passports.

Plot Passports

Plot Passports are a simple way of helping private homebuilders to understand what they can build on their plot. Plot Passports are simple summaries of the design parameters for each plot capturing relevant information from the Design Code, planning permission and Delivery Statement. They are short documents specific to each plot and form part of the marketing materials available for each plot. They act as a key reference point for prospective purchasers and form part of the marketing material available for each custom build plot to help private homebuilders to understand what they can build on a plot. They add value and certainty by acting as a key reference point for the purchaser, capturing relevant information from the planning permission, design constraints and procedural requirements in a concise and accessible format.

Plot Passports are required for approval before commencement of those phases which include plots for private homebuilding. They can help speed up the planning process; Reserved Matters applications from self-builders which fall within the plot passport guidance can be processed in less time. Each passport should clearly show the plot location, permissible building lines and side spacing, proximity constraints to neighbouring buildings, the developable footprint and building height restriction.

Passports should be clear about the number of dwellings that can be built (generally only one) as well as car parking and access location etc. The choice of finishing materials, fenestration and roof shape is usually left to the plot owner.