

ADDENDUM TO PLANNING STATEMENT FOR APPLICATION 23/03073/HYBRID FOR AN 82 APARTMENT AFFORDABLE EXTRA CARE HOME (CLASS C2) AND UPTO 14 RESIDENTIAL DWELLINGS (CLASS C3) AND ASSOCIATED WORKS AT PARCEL R, KINGSMERE, BICESTER

15 JANUARY 2024

1 INTRODUCTION

- 1.1 Planning application 23/03073/HYBRID for the construction of an 82 apartment affordable extra care home (C2 use class) with associated open space/green infrastructure, landscaping, car/cycle parking, service infrastructure (drainage, highways, lighting), engineering operations, creation of new vehicular access and re-instatement of existing access to footpath (in FULL), and in OUTLINE, the construction of up to 14 residential (C3 use class) dwellings with associated landscaping, service infrastructure (highways, drainage, lighting) was submitted to and validated by Cherwell District Council (CDC) on 14 November 2023.
- 1.2 The case officer, Ms Linda Griffiths, provided the applicants (Preferred Homes Ltd (PHL) and Countryside Properties (Bicester) Ltd (Countryside)) with her initial thoughts on the submission in a letter dated 13 December 2023.
- 1.3 The letter can be split into four elements –
- The fundamental issues, ie, those relating to scale, height, massing and how the extra care building relates to the wider residential use, overdevelopment of the plot,
 - The minor matters where further information/clarity is required, such as the police/crime comments, energy efficiency, Health Impact Assessment,
 - Transport as a discrete matter, principally the concern of OCC Highway Authority, for example, carpark management, cycle parking, technical details, and
 - Those areas where consultation responses are still awaited, for example, BNG, open space, affordable housing.
- 1.4 A meeting was held on 18 December 2023 to discuss the contents of the letter, the principal focus of the discussion being on the fundamental issues of the design of the extra care building and its relationship to the wider context.
- 1.5 A package of information has been put together to respond to the first three bullet points identified in paragraph 1.3 above. In this context, this Addendum to the Planning Statement –
- focusses on the Context to the design matters by providing further detailed information and explanation of the PHL philosophy, the principles and drivers behind the design, what is and what is not feasible ie, the changes that can be accommodated and the balance that therefore has to be applied in design terms. It also provides evidence in the form of case studies of other schemes as an Appendix, and
 - provides commentary on a number of the minor matters raised in the letter of the 13th December.
- 1.6 The references to highways and transport in the letter of the 13 December and those of OCC Highway Authority are dealt with in the separate Transport Note.
- 1.7 The specific detailed design response and the resultant revisions are presented in an Addendum to the Design and Access Statement.
- 1.8 For the avoidance of doubt, the following documents and plans make up this revised package of information –

- Addendum to the Planning Statement, produced by Rapleys,
- Transport Note, produced by RHDHV
- Addendum to the DAS, produced by C&W – this explains the design response in detail,
- Revisions to plans as follows –
 - Proposed Site Layout Plan 21413-CW-BC-XX-DR-A-2011-P24
 - Ground floor Extra Care 21413-CW-BC-00-DR-A-2000-P-09
 - First floor Extra Care 21413-CW-BC-01-DR-A-2001-P-09
 - Second floor Extra Care 21413-CW-02-DR-A-2002-P-09
 - Third floor Extra Care 21413-CW-03-DR-A-2003-P-08
 - Site Sections 21413-CWa-B1-XX-DR-A-2030-P02, 21413-CWA-B1-XX-DR-A-2031-P01, 21413-CW-BC-A-2121-P-01, 21413-CW-BC-XX-DR-A-2120-P-03
 - Roof Plan Extra Care 214130-CW-BC-XX-DR-A-2004-P-03
 - Elevations 21413-CW-BC-XX-DR-A-2006-P-07, 21413-CW-BC-XX-DR-A-2007-P-07
 - Visibility Splays for Car Park

1.9 These should be read in conjunction with the submitted documents and plans of November 2023. The Bicester Application Document Submission Table has been updated accordingly.

2 CONTEXT TO THE EXTRA CARE DESIGN

BACKGROUND TO/PHILOSOPHY OF PHL

- 2.1 PHL is a Registered Provider of social housing which was regulated by the Regulator of Social Housing in April 2020. PHL focuses on the development, management and ownership of community inclusive affordable rented Extra Care Independent Living across England.
- 2.2 In 2022, PHL entered a joint venture with Nuveen/TIAA. TIAA is a North American pension fund with \$1.4 trillion of assets under management. Nuveen is TIAA's wholly owned investment subsidiary. The significant investment drawn from TIAA is specifically earmarked to produce the most notable Environmental Social Governance (ESG) and Net Zero Carbon (NZC) commitments as can be achieved whilst maintaining viability. The TIAA investment in PHL is its first social housing exposure in the European market and consequently our agreed KPI's require ambitious ESG and NZC goals, including delivering projects that achieve BREEAM Excellent which is above the industry norm of BREEAM Very Good.
- 2.3 PHL is both the developer and the landlord and it therefore retains ownership of its Extra Care housing. Consequently, it is aligned with Adult Care Commissioners to ensure that both the construction and the internal layout/fit out are of the highest possible standard to reduce ongoing maintenance costs and future proof the apartments for residents. PHL strongly believes that quality and sustainability is as important for affordable social housing as it is for private residential housing and that there should be no compromise on the design and quality of Extra Care housing to provide a 'Home for Life' for qualifying residents – schemes do have to be financially viable and cost effective, however.
- 2.4 PHL collaborates with its Local Authority partners and enters into a nomination's agreement with the relevant Adult Care Commissioning Authority to enable the Commissioners to nominate 100% of the apartments in a scheme to qualifying residents taken from the Local Authority's housing register. PHL

manages each Extra Care scheme but does not provide the care element. PHL works with the Local Authority appointed care providers which attend the Extra Care scheme daily to provide required bespoke care to residents.

- 2.5 There are many advantages for the Local Authority in partnering with PHL and following the model outlined, including: -
- Care delivery efficiency, given that multiple residents live in a single, purpose-built development thus avoiding the inefficiencies of domiciliary care,
 - The freeing up of larger family-sized housing as older residents move out of such accommodation or from inappropriate older stock housing that is not care compatible,
 - A significant cost saving to the Local Authority (which can amount to circa £20m over 25-year nominations period), given the substantially lower cost of housing and care in a fit-for-purpose Extra Care scheme as opposed to the higher costs of paying for residents living in registered Care Homes,
 - The fact that Extra Care apartments can also be provided to the NHS to enable the NHS and Care Commissioners to offer 'step down' facilities, e.g. for residents moving from hospital but requiring a period of respite prior to moving back home thus freeing up NHS hospital bed spaces.

PRINCIPLES AND DRIVERS BEHIND THE PHL DESIGN AND CONCEPT

Grant Funding, Affordability

- 2.6 To ensure viability and affordability, PHL's affordable Extra Care delivery model requires Homes England Affordable Homes Programme grant funding which supports the delivery of affordable rented social housing. PHL is a Home's England Investment Partner and is already drawing grant to support its Extra Care projects. The timetable for the current programme of Homes England funding effectively expires in March 2026. There is therefore significant pressure on PHL to secure planning permission to be able to start on the Kingsmere site as soon as possible.
- 2.7 Affordable rent is defined as rent which is no more than 80% of the open market rent and service charge for a similar open market product. Keeping rents, service charges and utility bills as low as possible for residents is extremely important to PHL and in this regard, it should be noted that PHL look to set rents below the 80% (where it can in terms of viability) to ensure that the PHL Extra Care housing is truly affordable for local qualifying residents.
- 2.8 PHL residents will be in receipt of housing benefit to support the payment of their affordable rent and service charge. All of the PHL schemes are 100% affordable rent tenure and there is no mixing of tenures.
- 2.9 As you will be aware from the pre-application discussions, there has been considerable 'behind the scenes' ongoing work with the Oxfordshire Care Commissioners and CDC's Frances Evans in establishing support and determining the substantial need for affordable Extra Care within Cherwell.

Site Size, Location and Design

- 2.10 It is acknowledged that the original outline planning application, subsequent permission and Design Code for Parcel R was for a 60 bed Extra Care Home and adjacent retail unit – two separate uses with very different design, parking and access requirements impacting on the street scene in different ways. Both schemes were, of course, given the outline nature of the application, entirely speculative with no specific end-user in mind or under contract. Furthermore, the application submission in 2014 came forward when the approach to Extra Care living and provision was in its infancy and a relatively unknown model. It was of a design more akin to the traditional private Care Home concept of larger foot plates spread over a larger area and consequential lower building heights, and set in extensive landscaped gardens.

- 2.11 In more recent years with the introduction of the HAPPI principles (Housing our Aging Population Panel for Innovation) and Housing LIN design guidance which provide best practice design for Extra Care, Extra Care Independent Living, particularly the affordable offer, has developed and evolved into a distinctly different model to that envisaged by the outline permission. Buildings are more compact, garden areas and overall plot size is notably smaller.
- 2.12 PHL's approach is wholly aligned with the current sector thinking to enable a viable and sustainable design. One of the requirements of the Homes England grant funding is the adherence to the aforementioned HAPPI principles and Housing LIN Design guidance which have a profound effect on the eventual building type for residents. These principles are set out in detail in the Design and Access Statement and are also referenced in the main Planning Statement, and are the backbone of the scheme design.
- 2.13 Of particular importance in terms of building design and shape, is that corridor length is kept to a minimum moving away from an institutional feel by providing reduced and safe walking distances to lifts and the central communal facilities. This is an important design generator in Extra Care buildings where residents may suffer from impaired mobility and/or dementia (the latter generally the higher order care residents) and need regular access to communal catering, rest spaces and staffed areas. PHL schemes are also provided with higher space requirements for the communal areas which are always located on the ground floor (particularly key to controlling and restricting general public access beyond this space).
- 2.14 The corridor length parameter is one of the principal reasons why PHL developments are designed over four floors rather than three. The L-shape of the building (which PHL favours and indeed, is now more the sector norm) similarly represents the most appropriate design solution to achieve these HAPPI parameter requirements and achieve the desired economies of scale and viability. However, where necessary, and acknowledging specific site circumstances, PHL will move away from this core L-shape, without compromising the overall internal design requirements, as can be seen with the Kingsmere scheme, in order to address concerns raised regarding the visual impact on neighbouring C3 dwellings and the Greenway to the north.
- 2.15 In this context, parallels can be drawn with Department for Education (DfE) guidelines and school designs – these too change and evolve with time and with altering requirements. The floor and roof heights and the overall design of the St Edburg Primary School, currently under construction on the other side of the Central Square, is principally dictated by the DfE guidelines. The DAS for the school references - a piazza-type area for congregating to pick up the children; 3 ASHP (though the location of these is unknown); the flat roof with lower and taller elements that gives a contrasting modern form to that of the traditional pitched vernacular that both visually separates but is not out of place; that it has a very angular appearance, which is in part a product of its function – just like the Extra Care on the opposite side of the Square.
- 2.16 The more compact nature of the Extra Care buildings (also a product of carbon buildings which tend to be taller and naturally compact), coupled with the viability factor and drive to keep residents costs and rents as low as possible, means that PHL generally sources sites of between 1 and 1.5 acres. PHL currently has two sites under construction, both granted permission in 2022 - in Leeds (63 apartments on 1 acre) and Telford (72 apartments on 1 acre). Further detail on these as Case Study examples, is provided as Appendix 1 to this Addendum. The PHL scheme in Nottingham will start on site early next year and is 73 apartments on 1.2 acres. The proposed Kingsmere development falls within PHL's land requirement at 1.39 acres. At 82 apartments this meets the published and acknowledged area demand for affordable provision and enables more economies of scale for the potential residents, in a location where house prices and rents are quite high.
- 2.17 The 'sweet spot' for the affordable Extra Care schemes, balancing all factors of cost of the site, site size, Homes England grant, HAPPI design principles, affordability to residents in terms of keeping rents, service charge and bills low is over 60 apartments. These, coupled with the level of local demand and need, will ultimately dictate the number of apartments in any given scheme.
- 2.18 Either being part of the local centre itself or easy access to local centres and accessible public open space (beyond the compact but specifically designed, secure on-site provision close to the building) is

important to Extra Care living, and is another key design principle of the PHL Extra Care schemes. PHL buildings are always located to the street frontage of any site to provide immediate accessibility for residents but also for nearby communities wishing to access facilities on offer within the Extra Care building.

- 2.19 The CDC landscape officer comments that *'The problem with care home gardens is the perceived health risk to residents and 'other problems' which can result in the long term closure of care home gardens. The novelty soon vanishes and the garden is left overgrown with dead trees. It can look very unsightly and be perceived as a maintenance problem. A solution is to ensure there garden is appropriately designed for low maintenance, with many different species/cultivars of garden trees for visual interest, non-toxic/non-allergic, non-spiney, low groundcover plants, grass area and user-accessible paths, patios and hard surfaces;'*
- 2.20 The above observation is particularly true of Care Homes and the earlier tranche of Extra Care homes which generally sat in large plots surrounded by blandly designed gardens. The smaller and more compact garden design, often more enclosed by the Extra Care building, which focuses on low maintenance planting with a sensory emphasis (visual, smell and sound), user-accessible paths and seating areas, whilst also providing opportunities for residents to also participate in their own gardening activities, overcomes much of this criticism and is a concept fully embraced in the PHL schemes which all follow these design principles. It is noted that the landscape officer is not objecting to the garden design proposals.

Age and Level of Care

- 2.21 PHL residents are generally of an average age of 75, predominantly single women. Whether single or part of a couple, residents can readily occupy a one bedroom apartment and consequently, PHL schemes are predominantly one bedroom apartments with only a few of two bedroom design.
- 2.22 All residents entering the Extra Care scheme will require an element of care from the outset, although the level of that care will vary according to each resident and over time. The level of care ranges from low, medium to high and the ratio usually required by the Commissioners is a third for each level. This means that the Extra Care scheme does not become a 'de facto' care home (with 24hr care requirements) – there are consequently less care workers at any one time on-site that would be required in a traditional registered care home setting. Notwithstanding this, Extra Care is recognised as a C2 use, and this is set out in more detail in the main Planning Statement. The three PHL schemes currently under construction have all been granted planning permission on this exact premise.
- 2.23 Extra Care residents live independently and fully engage with their surrounding communities. Also, the local communities will fully engage with the Extra Care development as wide-ranging community facilities are provided on site including (for example) a café and several multi-purpose rooms which can provide discreet areas for activities such as pilates and yoga, and weekly doctors surgeries or other meeting spaces. All of the PHL schemes incorporate the café/bistro concept that is included within the Kingsmere Bicester application.
- 2.24 The particular demographic of the residents, coupled with the more limited number of care staff likely to be on site at any one time (as well as the sustainable locations of these schemes), does mean that car parking and cycling provision needs are much lower than might otherwise be the case. Further detail in this regard is provided in the Transport Statement and Transport Note.

ESG and Sustainability

- 2.25 The introduction of Part L of the Building Regulations in June 2023 has had a profound effect on Extra Care developments especially for PHL/TIAA/Nuveen given their high ESG/NZC commitments. Coupled with this of course, are the Council's own Local Plan policies which reflect the drive for sustainable construction and energy efficiency.
- 2.26 PHL install Air Source Heat Pumps (ASHP) to reduce energy usage. These pumps are an expensive addition to the overall costs of the development and can only be housed on the ground or on the roof,

and given the size and number required to serve the number of apartments that any one scheme is providing there are inevitably noise/acoustic attenuation and weight considerations to contend with. ASHP is backed up by photovoltaics on the flat roofs of the buildings. The combination of the two sustainable energy sources means that electricity bills for residents will be significantly reduced, an important aspect when considering fuel poverty issues for more vulnerable and less wealthy members of society, and reflects the fact that affordability is at the heart of each PHL development.

- 2.27 From a Kingsmere perspective, given the potential acoustic enclosure requirements coupled with the height sensitivities, it is not considered practicable to locate the ASHP on the roof. They are housed in an acoustic attenuation enclosure on the ground located to the north of the car park alongside the substation and bike store. Submitted drawing 2143-CW-B1-00-DR-A-2022-P03 indicates the attenuation enclosure within which the six ASHP will be housed allowing for the required circulation and maintenance clearance within it.
- 2.28 If the ASHP/photovoltaics are considered problematic from a planning and visual design impact point of view, the energy proposals will have to revert to the more traditional, less sustainable heating solutions, with the consequential knock-on effects to end user heating costs and conflict with not only CDC energy/climate policies, but also Building Regulations, net zero carbon commitments and the PHL/Nuveen ESG.

3 MORE MINOR MATTERS

Layout and Design in context of Crime

- 3.1 The Thames Valley Policing Designing Out Crime response is acknowledged. It is considered that much of the commentary is concerned with the internal operation of the building in terms of access and security – this is noted, and will be managed accordingly by the end operators (Pinnacle on behalf of PHL)- it is not therefore a general planning concern.
- 3.2 The use of signage will assist in clarifying the main entrances to the building which are from the Central Square and from the car park. These entrances will be controlled by specific security access systems and the Extra Care manager. Internal alterations proposed to the reception area will provide a increased visibility of those people entering the building. Access into and out of the bin store, from both the internal corridor and onto the path adjacent to the car park/ambulance bay will be security controlled. This similarly applies to the buggy store.
- 3.3 We can provide a plan that identifies areas of general public and resident only access. To be clear, the wider community access to the bistro will not be through the remainder of the extra care building, but will be through an access off the bistro patio. During the hours the community can access the bistro there will be security access doors in operation between it and the rest of the building.
- 3.4 Access into and out of each apartment is from the internal corridors of the building. The patio doors on the ground floor apartments are not proposed to be used as an access into the apartment and will be of an appropriate, secure and safe patio door design.
- 3.5 An appropriate lighting scheme has been submitted that provides appropriate coverage of the car park and garden areas of the site.

Residential Amenity

- 3.6 The submitted plan 21413-CW-BC-XX-DR-A-2010-P-05 identifies the boundary treatments proposed. This shows the Extra Care garden boundary/patio along the greenway as 1.2m high decorative railings in accordance with the Design Code requirements. The actual private garden area is closed off from the more open patio area along with the raised planting bed/plant area and is available only to residents and their guests.
- 3.7 The submitted Design Code for the C3 residential element identifies that the Greenway boundary will be either the 1.2m high black railings or where appropriate 1.8m red brick walls.

Sustainable Construction and Energy Efficiency

- 3.8 It is acknowledged that neither the Energy and Sustainability Strategy (ESS) or the Planning Statement references that Cherwell is within an area of water stress. Notwithstanding this, the ESS does clearly state that the water efficiency proposals are proposed to achieve the 110litres/person/day.

Health and Well Being

- 3.9 Reference is made to the need or otherwise of a Health Impact Assessment (HIA). It is considered that a specific desktop or rapid HIA is not necessary in this instance.
- 3.10 The site location is part of a pre-planned urban extension, including the specific use of the site as an Extra Care facility, which has already received planning permission. The planning and design of this urban extension has ensured that (i) the appropriate levels of open space and green infrastructure have been provided or exceeded and that they are accessible to the whole community; (ii) comprehensive pedestrian and cycle networks are provided both along the streets or as part of a greenway network that permeates through the development; (iii) appropriate public transport access is provided within and outwith the development providing links to Bicester town centre, etc; (iv) retail opportunities and community/health/education facilities serving day-to-day needs are accessible to all whether by private car, public transport or walking and cycling; (v) a high quality of design is achieved through the Design Code.
- 3.11 Paragraphs 2.1 to 2.27 provide a detailed explanation of the drivers and principles behind the proposal and the detailed care and intention that goes into the provision of Extra Care Homes to ensure that the individual apartments themselves and collectively the wider facility, meets the changing needs of its residents over time and provides the residents with an energy efficient and cost effective home for life.
- 3.12 In summary, the pre-planned urban extension within which the specific extra care home (application) sits, together with the very specific requirements to which the facility is designed, has considered the effects and impacts on the health and well-being of its intended residents. Both have sought to maximise positive health impacts.

Transport and Access

- 3.13 This is dealt with in the separate Transport Note.

4 CONCLUSIONS

- 4.1 This Addendum provides further clarity on the drivers and principles behind the design of the Extra Care and the challenges that exist in balancing the commitment to ESGs, energy efficiency and affordability to the tenants of the scheme, specific design requirements laid down by the HAPPI principles, the considerable need for affordable extra care accommodation and the overall viability of the scheme, against the aesthetic design requirements in terms of the specific location.
- 4.2 This is a specific market-led scheme that reflects and indeed goes beyond current thinking in the context of extra care provision. It is a different proposition to that envisaged in 2014 when the outline application was submitted and it is inevitable that there will have to be some level of compromise in terms of the design principles established then and the realisation of much needed affordable extra care housing.
- 4.3 The proposal also brings with it a considerable number of social, economic and environmental benefits that are detailed in section 8 of the Planning Statement.
- 4.4 Overall the proposal is clearly a sustainable quality development and should be granted permission without delay.

APPENDIX 1 – CASE STUDIES OF OTHER PHL SCHEMES

SITE A: FORMER LEISURE CENTRE, GRANGE ROAD, STIRCHLEY, TELFORD



Planning permission: TWC/2023/0028 full permission granted 16 March 2023, now under construction. Earlier permission TWC/2021/1201 full permission granted 4 May 2022.

Site area: 1.02 acres (0.412ha)

Number of Bedrooms: originally 67, increased to 72 (5,917sqm of floorspace)

Number of car parking spaces: 21 (also use of adjacent car park where necessary available through the site purchase contractual agreement)

Number of cycle spaces: 4 external; also internal for residents scooters, etc.

Brief Description of Context –

Small regular shaped plot of brownfield land, formerly a single storey brick-built Council leisure centre which was demolished in 2020. Site is located in a defined local centre comprising a mix of uses constructed at varying times and comprises a terrace of five retail units, a co-op foodstore, a medical and dental practice, a nursery, a church and a community building/library operated by Stirchley and Brookside Parish Council. The majority of these buildings are generally single storey brick with pitched tiled roof, interspersed with some two storey elements. The new modern build of the Grange Park Primary School and the Telford Park Secondary School (also providing a community leisure centre function beyond the school day) are two/three storey and stand in stark contrast to the rest of the local centre. The School has a separate car park accessed off Grange Road, through which the PHL Extra Care scheme also takes access. Bus stops are located along Grange Road.

Alongside Grange Road is the Mad Brook/Stirchley Dingle, a 5ha Local Wildlife Site and Nature Reserve and is accessible to the general public via a footpath off Grange Road which continues on to provide access to the residential area of Brookside.

The PHL scheme was originally designed with the two wings at four storey. However, whilst the Council wanted a positive new frontage to Grange Road, there were concerns about relative impact on the LNR/LWS resulting in the Grange Road wing reducing to three storey and incorporating a roof terrace/garden. The standard L-shape configuration contains an internal courtyard with enclosed garden and car parking.

SITE B: FORMER POLICE STATION, WATNALL ROAD, HUCKNALL



Planning permission: V/2021/0849 granted on 17 April 2023

Site area: 1.2 acres

Number of Bedrooms: originally 71, increased to 73 (5,774.80qm of floorspace)

Number of car parking spaces: 29

Number of cycle spaces: 18 external and further potential spaces in the internal scooter store

Brief Description of Context –

Irregular shaped plot of brownfield land, formerly a three plus storey police station within Hucknall town centre. Site location comprises a mix of uses including two storey residential dwellings with gardens, public space principally in the form of surface level car parks, a two storey health centres and other commercial buildings predominantly of two storeys. The majority of these buildings are generally single storey brick with pitched tiled roof, interspersed with some two storey elements. Vehicular access into the site is from Belle Vue Road where some onsite car parking is provided. Further vehicular access is from Watnall Road. Bus stops are located on Watnall Road and Derbyshire Road.

The site configuration and predominance of two storey development surrounding the site meant that a T-shape building had to be considered from the outset. The main 'street frontage' part of the building is the four storey element. The return wing is three storeys reduced from the originally conceived four, the protruding balconies were replaced with juliet versions and the roof garden removed to reduce intrusive impact on the Curtis road residents.