

Affordable Housing Scheme Upper Heyford

On behalf of Dorchester Group and Bovis Homes

17th February 2014

1. Introduction

This Statement has been prepared on behalf of Dorchester Group and Bovis Homes.

It is submitted pursuant to discharging the relevant obligation under the S106 Agreement (with reference to the hybrid planning permission for the new settlement ref 10/01642/OUT dated 22 December 2011) ("the Planning Obligation") concerning the submission and approval of an Affordable Housing Scheme. "Eligible Occupier" has the meaning given to it in the Planning Obligation.

Clause 1.1.3 of Schedule 3 of the S106 Agreement requires that an Affordable Housing Scheme is to be approved by Cherwell District Council.

Discussions have been ongoing between the District Council housing officers and the applicants, and this submission reflects those discussions. It follows on from a Housing Survey undertaken of existing tenants in 2012.

2. Proposed Mix of tenure and Units

The proposed mix submitted for approval is guided by the needs as assessed from the Housing survey and is as follows:

Affordable Housing Units 309

70/30 Affordable Rent/Shared Ownership Mix – the proportion of Shared Ownership units may increase if the existing tenants are able to buy shared ownership and this takes the proportions above 30%.

Rent 70%								
Flats		Maisonettes (inc elderly units)		Houses			Total	
1b2p	2b4p	1b2p	2b4p	2b4p	3b5p	4b7p		
Total Number	45	36	9	6	63	40	17	216
	21%	17%	4%	3%	29%	18%	8%	100%
			3xwch	3xwch				

Shared Ownership 30%					
Flat		Houses			
	2b4p	2b4p	3b5p	4b6p	Total
Total Number	10	44	34	5	93
	11%	47%	37%	5%	100%

All the affordable units will comply with the HCA's Design and Quality Standards, and be built to Code for Sustainable Homes L3.

50% of the affordable units will be constructed to Lifetime Homes Standards, and should include all Elderly units and Maisonettes, which will be located proportionally throughout each phase.

2% of the units will accord to full Wheelchair standard, which equates to 6 units as shown in the above table, which will be located proportionally throughout each phase.

Affordable Housing should be delivered in each Residential Phase as prescribed in the S106.

The affordable units should be transferred to an RP in agreement with the District Council.

The affordable housing units should not be clustered in more than 15 units unless otherwise agreed with the District Council. The exception to this general premise is expected to be within the Trident Area due to the urban design imperative for larger building mass which will be more suited to flats and apartments. The details of the design approach will be established at the Reserved Matters Approval stage in due course.

There will be a small proportion of open market flats or apartments provided as part of the local centre. Affordable rent maisonettes will be provided in appropriate development parcels as consistent with Design Code parameters.

It is noted that due to the Eligible Occupiers and need to match the affordable housing with the existing tenants the tenure on each parcel will need to maintain a degree of flexibility on tenure to accommodate the household identified.

3. Residential Phasing Plan

The accompanying drawing HEYF-5-131 D indicates the phasing of overall housing development across the site. The approach ensures front-loading of delivery of affordable housing in the earlier years of development phasing:

Dorchester Plan	Phasing	Affordable	Private sales	Cumulative Total	Cumulative % Affordable
2013 - 2014		21	41	62	33.9
2014 - 2015		51	49	162	44.4
2015 - 2016		16	57	235	37.4
2016 - 2017		30	33	298	39.6
2017 - 2018		29	31	358	41.1
Total		147	211	358	41.1

Bovis Phasing plan	Affordable	Private sales	Cumulative Total	Cumulative % Affordable
2014	22	30	52	42.3
2015	45	40	137	48.9
2016	33	40	210	47.6
2017	32	40	282	46.8
2018	30	40	352	46.0
2019		40	392	41.3
2020		7	399	40.6
Total	162	237	399	40.6

The spatial distribution of the affordable housing clusters is shown in accompanying drawing HEYF-5-122 D. This approach is broadly indicative as the detailed approach can only be established at the detail Reserved Matters Approval stage in due course, but does confirm the general proposed disposition across the site.

4. Process for Existing Tenants at Upper Heyford

The site has been assessed and a phasing strategy developed for redevelopment of the existing estate that starts with the northern bungalows (Trenchard Circle) and then works through the estate to the south of Camp Road.

1. The qualification procedure for affordable housing, and also for the local lettings plan, is to be agreed with the District Council.
2. Dorchester and Cherwell District Council will meet each of the tenants/households on a phase by phase basis and assess them on three criteria:
 - a. Qualification for Affordable Housing – they will be assessed against the current Cherwell Affordable Housing Criteria.
 - b. Qualification for Local Letting Plan – they will be assessed against the provisions of the Local Lettings Plan (available from either Dorchester Group or Cherwell District Council).
 - c. Affordability assessment carried out by an Independent Financial Advisor – this will decide if the tenant is able to afford to buy on the open market, buy a shared ownership/equity home, or rent.

3. Dorchester will have the following information available for the tenants:
 - a. Rent levels for the affordable new build units, Shared Ownership Pricing, and the price for the units on the open market (new and refurbished), proposed specification for the units (new, refurbished, affordable)
 - b. Timetable for the refurbishments and therefore dates by which tenants will need to move.
 - c. Timetable for the delivery of the new units for both affordable and open market.

Dorchester will not serve notice ending tenancy or seek possession of any property occupied by an Eligible Occupier until they have been offered an Affordable Housing Unit in accordance with paragraph 1.6 of Schedule 3 to the Planning Obligation. Dorchester may however accommodate existing tenants on alternative equivalent properties on Heyford Park if suitable affordable property is not available at the time that their property is required for refurbishment. An alternative equivalent property will have the same or more bedrooms and will be at the same rent as the property the tenant was in before the move, their rent will then move in line with other equivalent properties across the estate. If an Eligible Occupier has moved into an alternative equivalent property in these circumstances they will remain an Eligible Occupier and will be offered suitable affordable accommodation when available.

Although not part of the Affordable Housing Scheme criteria, there are a number of important considerations that need to be borne in mind by all parties:

1. To refurbish the existing units, they will need to be unoccupied;
2. The refurbishment needs to be programmed in a fixed order through the scheme, and will therefore need to vacate whole roads for the refurbishment works;
3. This process will inevitably result in people moving at least once during this refurbishment; and
4. There will be no refurbished affordable rental or shared ownership/equity properties available for at least the first phase, if at all.

Dorchester will then be able to work with each household/tenant and deal with them depending on where they fit within the following assessment:

Qualifies for an Affordable Rental unit:

1. The tenant will be offered a new build rental property that they are eligible for through the local lettings plan
2. The tenant will choose if they want to move to the property.
3. Review when the property will be delivered.
4. If property to rent is not available to move into, prior to their existing property being required for refurbishment they may be offered another suitable rental property on the estate until their rental property is available. If they are an Eligible Occupier they will not be served notice unless an offer of an affordable unit has been made. If an Eligible Occupier has moved into an alternative equivalent property in the absence of

suitable affordable accommodation they will remain an Eligible Occupier and will be offered suitable affordable accommodation when available.

5. If the tenant does not want to rent the new property, then Dorchester may choose to offer the tenant another un-refurbished property on the base to rent – but it is likely this property will eventually get refurbished and they will need to move in due course. If the tenant chooses not to rent the unit they will no longer be an Eligible Occupier.

Qualifies for Shared Ownership/Equity within the Local Lettings Plan and wants to buy:

1. The tenant will be offered a new build unit that they are eligible for through Shared Ownership/Equity.
2. The tenant will choose if they want to buy the unit.
3. Review when the unit will be delivered.
4. If the property to purchase is not available to move into, prior to their existing property being required for refurbishment they may be offered another suitable rental property on the estate until their purchase property is available. If they are an Eligible Occupier they will not be served notice unless an offer of an equivalent unit or affordable unit has been made. If an Eligible Occupier has moved into an alternative equivalent property in the absence of suitable affordable accommodation they will remain an Eligible Occupier and will be offered suitable affordable accommodation when available.
5. If the tenant does not want to buy the property, then Dorchester may choose to offer the tenant another un-refurbished property on the base to rent – but this property will eventually get refurbished and they will need to move in due course. If the tenant chooses not to buy the property they will no longer be an Eligible Occupier.

Does not qualify for affordable housing through the local lettings plan:

1. When the property is required for refurbishment, Dorchester will try and find another un-refurbished property on the site to rent to them – however these properties will eventually be required for refurbishment in due course.

Household does not qualify for affordable housing but is able to afford open market and wants to buy:

1. Select the unit that the tenant wants to buy.
2. Review when this unit will be delivered.
3. If unit to purchase is not available to move into, prior to their existing unit being required for refurbishment, they will need to move into another rental property on the estate until their Open Market Unit is available.