
Affordable Housing Reserved Matters Strategy (Update)

Berewood Phase 3b (Larkfields)

(V2 – May 2023)

Affordable Housing Reserved Matters Strategy

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1. Introduction

- 1.1. This strategy was originally prepared to accord with clause 8.32 of the West of Waterlooville Section 106 (S106) dated 5 April 2012, which requires an Affordable Housing Reserved Matters Strategy (AHRMS) to be submitted with each Reserved Matters Application.
- 1.2. The Affordable Housing Reserved Matters Strategy shall, but without prejudice to the generality thereof, include:
- 8.32.1 *“A plan of those Affordable Housing Units to be provided on the Reserved Matters Area showing their location and having due regard for the requirement of the Design Code and relevant Phased Area Strategy;*
 - 8.32.2 *A schedule of the number type mix size and tenure and initial tenure duration of the Affordable Housing Units to be provided in the Reserved Matters Area;*
 - 8.32.3 *Details of the rent levels of the Affordable Housing Units to be provided (and in agreeing the rent levels as part of the approval of the Affordable Housing Reserved Matters Strategy the Relevant Authority shall take account of affordability to potential occupiers and the viability of the proposed provision);*
 - 8.32.4 *Details of the Registered Provider or Grainger provider in compliance with Clause 8.29;*
 - 8.32.5 *Details of how the Intermediate Affordable Housing Units will be provided in satisfaction of the requirements of Clause 8.20 of this Deed;*
 - 8.32.6 *details of the timetable for the provision of those social rented units to be wheelchair-accessible Housing and a mechanism for agreeing how the wheelchair-accessible Housing will be designed and fitted out and the nomination arrangements relating to the occupation thereof;*
 - 8.32.7 *Scale plans at no less than 1:100 of each Affordable Housing Unit internal layout together with confirmation that those units comply with requirements of Clauses 8.23 of this Deed of written confirmation from the HCA that their required standards for eligibility for Grant have been met;*
 - 8.32.8 *Details of anticipated management/service charges for the Affordable Housing Units; and*
 - 8.32.9 *Evidence that it is in compliance with the Approved Phased Area Strategy.”*
- 1.3. The findings of this strategy was found acceptable during the RM’s Planning Application, however a condition was attached to the Reserved Matters Consent for Phase 3b (WCC Ref – 21/02892/REM & HBC Ref – APP/21/0259) to secure the submission of an updated Affordable Housing Reserved Matters Strategy prior to occupation. For ease of reference, Condition 3 reads as follows:
- Prior to occupation of any dwellings hereby approved an updated Affordable Housing Reserve Matters Strategy shall be submitted to and approved in writing by the Local Planning Authority.*
- Reason: To ensure suitable affordable housing tenures within the development.*
- 1.4. This updated Strategy has accordingly been prepared to discharge Condition 3 and sets out how the affordable housing provision complies with the West of Waterlooville Planning Obligations and the Affordable Housing

Masterplan Strategy (AHMS). This statement should be read alongside the details approved through the RM's Consent.

2. Compliance with Planning Obligations

S106 Obligations

2.1. Clause 8 of the Berewood S106 Planning obligations sets out the following requirements for the provision of affordable housing to be met unless variances are allowed within the S106, and sufficient justification is provided at the time of the Reserved Matters Application.

- Of the total number of residential units to be provided on the site, 40% will be affordable housing units.
- A 50:50 split between rented and intermediate products.
- Compliance with WCC's Affordable Housing SPD 2008 (or any subsequent amendment or replacement therefore).
- Built to Lifetime Homes Standards. (Now Part M of the Building Regulations 2010).
- A minimum of ten per cent (10%) (unless otherwise agreed by the relevant Authority) of the Social Rented Units in any Reserved Matters Area shall be Wheelchair-accessible Housing and the provision thereof shall be agreed with the relevant Authority.
- The Affordable Housing Units shall be provided in clusters of no more than 10 to 15 units for houses and 10 to 20 units for flats within any Reserved Matters Area unless otherwise agreed in writing by the relevant Authority.
- The Affordable Housing Units in a Reserved Matters Area shall not share a boundary with the Affordable Housing Units in an adjacent Reserved Matters Area unless otherwise agreed by the relevant Authority.
- Size of the units must comply with the following sizes:

Table 1: S106 Minimum Net Internal Areas

Dwelling Type	Size of Unit – Net Internal Area (sqm)	Size of Unit – Net Internal Area (sq ft)
1 bedroom/ 2 person flat	45.0	484.34
2 bedroom/ 3 person flat	57.0	613.54
2 bedroom/ 4 person flat	67.0	721.18
2 bedroom/ 4 person house	71.0	764.24
3 bedroom/ 5 person house	82.0	882.64
4 bedroom/ 6 person house	95.0	1,011.81

- The outline consent site wide Energy Strategy states the Affordable Housing, where HCA funding is obtained, will be built to meet the CSH timeline of the Affordable Housing funding provider otherwise it will comply with national policy, in this case the 2013 (2016 L1B revision) revision to Part L1 of the building regulations.
- No more than seventy five per cent (75%) of the Open Market Units shall be occupied unless and until the Affordable Housing Units have been occupied or substantially completed to the reasonable satisfaction of the relevant Authority, unless otherwise agreed by the relevant Authority.

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Affordable Housing Masterplan and Phased Area Strategies

- 2.2. The following tables set out the quantum and tenure of affordable accommodated to be provided within Phase 3b.

Table 2: Affordable Housing Provision across the development

Phase	Total	Private Units (PU)	Affordable Housing Units (AHU)	% Affordable	No. Social/ Affordable Rented	No. Intermediate	Total
3b	122	73	49	39.4%	25	24	122

Table 3: Affordable Rented and Intermediate Provision

Unit	Affordable Rented	Intermediate
1 bed/ 2 person Flat	8	0
2 bed/ 3 person Flat	4	0
2 bed/ 4 person Flat	0	0
2 bed/ 4 person House	6	10
3 bed/ 5 person House	5	13
4 bed/ 6 person House	2	1
Total	25	24

- 2.3 Previous discussions with WCC have indicated that there is a low need for four bed affordable homes in this location. On this basis, three four-bed affordable homes are provided within Phase 3b, with a higher proportion of two and three bed properties proposed. In total, 49 affordable houses are to be provided, along with 12 apartments split between one- and two-bedrooms properties.

Cascade Mechanism:

- 2.4 As set out in the Affordable Housing Masterplan Strategy the provision may be varied. The Illustration below describes how this may be achieved:

Level 1

50% Social Rent	50% Intermediate
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Level 2



Level 3



- 2.5 Level 1 will only be applicable for the delivery of affordable housing within a Reserved Matters application which received HCA funding or equivalent Government or Local Authority subsidy.
- 2.6 Level 2 will be applied as a first step where no HCA funding is available.
- 2.7 Level 3 will be applied if it is agreed that Level 2 is unviable.

3. Phase 3b Affordable Housing

- 3.1 The Reserved Matters Consent (WCC Ref – 21/02892/REM & HBC Ref – APP/21/0259) secured approval for the Phase 3b residential development comprising of 122 new homes. Please refer to Appendix 1.0 for the approved Phase 3b site plan and tenure mix.

Tenure Mix and Cascade Mechanism

- 3.2 The Reserved Matters Consent for Phase 3b at Berewood secures the required provision of affordable housing with 49 of the 122 dwellings provided as affordable, totalling a 40.2% of the total housing numbers. The provision of affordable homes proposed is in alignment with the affordable housing provision required for this phase of development. Bloor Homes Ltd proposes as close to a 50:50 tenure split of affordable rent and intermediate homes as possible with 25 units to be provided as affordable rent and 24 provided as shared ownership/intermediate homes.
- 3.3 This submission broadly complies with Level 2 of the cascade requirements. This is because the HCA is not prepared to provide any grant funding on S106 developments. Throughout Grainger Trust Limited's registration process and ongoing engagement with the HCA, it has consistently held this position and we have no arguments to build a case for Berewood Phase 3b being partially funded by an HCA grant.
- 3.4 The Level 2 cascade mechanism specifies a 25% social rent, 25% affordable rent and 50% Intermediate provision be made available. Through discussions with Winchester City Council, it has been agreed that an Affordable Rent product, to be capped at Local Housing Association rent levels, is an acceptable rented product to be provided at Berewood. This agreement is not in strict accordance with the current S106 requirements. As such, Grainger Plc will seek a variation to section 8 of the S106 in order to amend the wording accordingly.
- 3.5 Grainger Trust Limited will manage the onsite affordable dwellings.

Design Standards

- 3.6 All Affordable Units shall be constructed to at least the minimum standard required by the Homes and Communities Agency's Design and Quality Standards, however given that there is no grant funding being provided, there is no requirement to seek confirmation of this point from Homes England (formerly the HCA) as per the S.106 Agreement. Lifetime Homes standards have now been superseded by Part M4 of the Building Regulations 2010, which has been applied to the affordable properties on this development.

Compliance with Wheelchair Accessible Housing

- 3.7 All of the affordable houses proposed comply with Part M4 (access to and use of buildings) of the building regulations 2010. As agreed through the reserved Matters Consent, to comply with the requirements of the S106 agreement, 10% of the Social Rent Units will be built to meet Part M4(2b) Optional Standards.

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Size of Units

3.8 The table below sets out a summary of the floor area requirements for the affordable units, which generally meet or exceed the requirements of the HQI Design Standards and the minimum sizes of the S106 met for all properties.

Table 4: Unit sizes

Dwelling Type	Size of Unit – Net Internal Area (sqm)	Size of Unit – Net Internal Area (sq ft)	Phase 3b Internal Areas (sqm)
1 bedroom/ 2 person flat	45.0	484.37	50.73
2 bedroom/ 3 person flat	57.0	613.54	61.03
2 bedroom/ 4 person flat	67.0	721.18	71.16
2 bedroom/ 4 person house	71.0	764.24	74.14
3 bedroom/ 5 person house	82.0	882.64	87.79
4 bedroom/ 6 person house	95.0	1,022.57	100.80

Clustering

3.9 Clause 8.25 of the S106 states that the Affordable Housing Units shall be provided in clusters of no more than 10 to 15 units for houses and 10 to 20 units for flats within any Reserved Matters Area unless otherwise agreed in writing and having regard to the requirements of the design code.

3.10 The Affordable Housing units are provided in three clusters of three, four, nine, and eighteen units. The larger clusters include a mixture of affordable housing shared equity and affordable housing rented. In the main, the clusters accord with the requirements of the S106. One cluster of eighteen in the north western corner of the site results in a slight variation to this rule and is designed in this way to accommodate suitable parking and access arrangements for the units whilst maintaining the perimeter block form required from an Urban Design perspective.

3.11 Within the development parcel, the affordable housing is appropriately mixed within the site, with the clusters of affordable homes integrating with open market properties in terms of proximity and, for the majority, being positioned on the same street as open market properties. The apartment blocks, by their nature, require a greater area of land around them in order to provide car parking, refuse and cycle storage to serve the units. As such, the clusters containing the apartment blocks are slightly larger than stipulated within the S106, but in design terms do not detract from the ability to successfully integrate the affordable homes.

3.12 From experience, Registered Providers prefer slightly larger clusters of affordable housing for reasons of efficiency of housing management and repair services, and Grainger Plc and Bloor Homes Ltd are happy to see a slightly larger cluster of homes as a variation to the S106. Furthermore, the mix of tenure within this location, coupled with the bespoke design of the affordable housing and blocks, will contribute to a tenure blind development that provides a high-quality living environment for future occupants.

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- 3.13 Overall, it is considered that the distribution of affordable units within Phase 3b meets the objectives of the clustering recommendations whilst ensuring an even distribution within the site, which is constrained by its unusual shape. When taking into account other development parcels within the wider Berewood development, affordable housing within Phase 3b and adjacent phases, will be evenly dispersed and pepper-potted, ensuring full integration with the market units.
- 3.14 Clause 8.26 of the S106, states that the Affordable Housing units in a phase will not share a boundary with the Affordable Housing units in any adjacent Reserved Matters area. The position of the affordable apartment blocks within Phases 3a and 3b has been design led, to ensure the affordable homes are provided in the right location with appropriate distances and boundary features between them.

Registered Provider and Management

- 3.15 Grainger Trust Limited (GTL), Grainger Plc's for-profit registered provider, or another Council approved Registered Provider will be the owner and manager of all the affordable homes for Phase 3b.
- 3.16 The agreed Registered Provider will be required to provide a coordinated management service to be consistent with existing management services across Berewood as the development is progressed over the forthcoming years. The approach is to provide tenure blind management of homes and to support both its own residents as well as the wider community of Berewood to evolve into an effective, self-confident community that acts in the interests of all.
- 3.17 Housing management and repair services will be provided under a service level agreement.

Rent Levels and Service Charges for Affordable Housing

- 3.18 As agreed in discussion with Winchester City Council Housing Officers Andrew Palmers and Nigel Baldwin, affordable rent levels will be capped in line with Local Housing Association rent levels.
- 3.19 Shared Ownership homes will be priced at levels that meet the S106 agreement and comply with the affordability test for intermediate housing, as has been demonstrated and agreed on the previous phases of the Berewood development.
- 3.20 Should service charges be necessary, they will be in line with local levels. They may be included in the 80% market rental levels; this will be confirmed with the appointed Registered Provider.

Delivery Program

- 3.21 The S106 states that no more than seventy-five per cent (75%) of the Open Market Units shall be occupied unless and until the Affordable Housing Units have been occupied or substantially completed to the reasonable satisfaction of the relevant Authority, unless otherwise agreed by the relevant Authority.



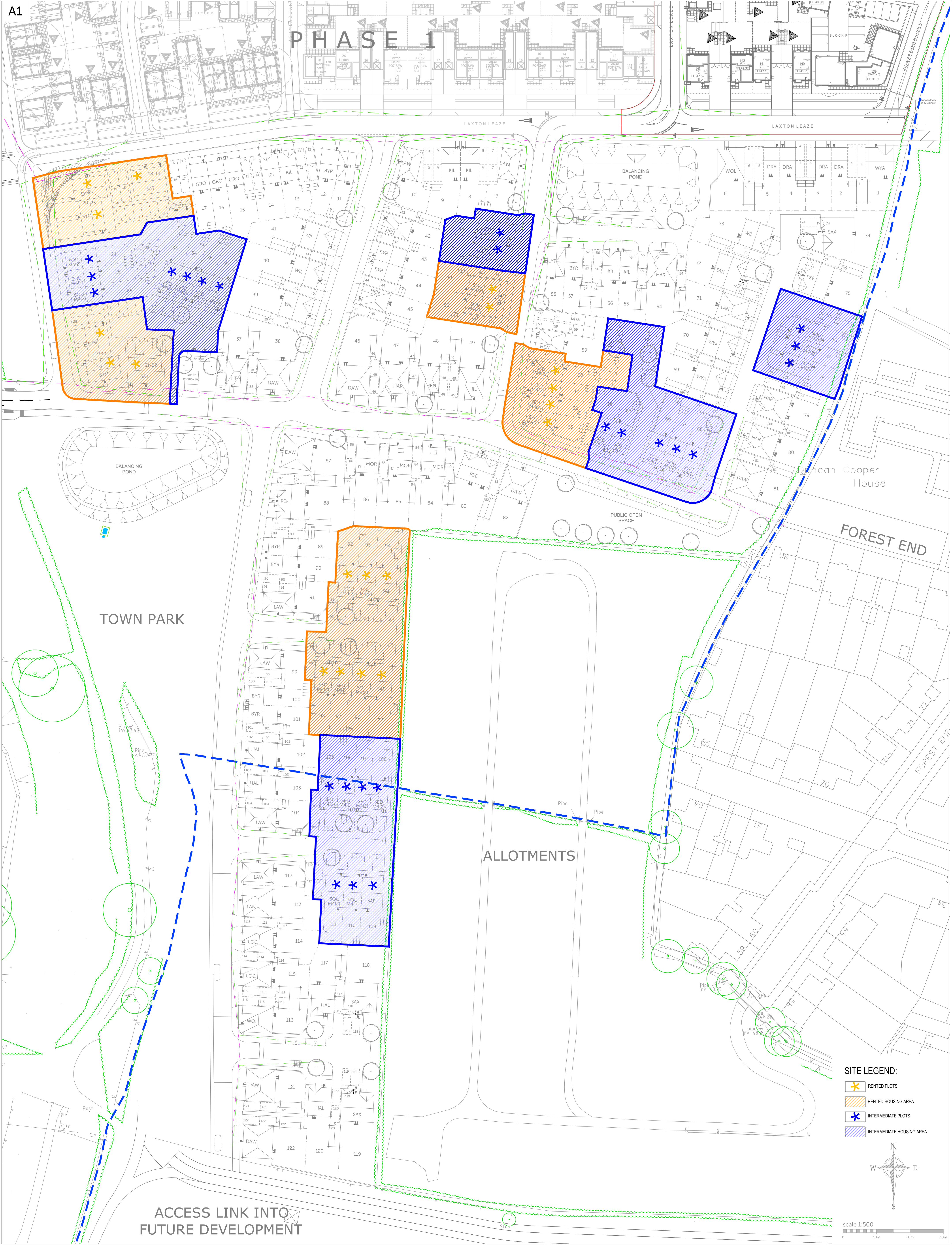
Appendices





Appendix 1.0:
Tenure Plan





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Rev	Description	Date	Au	Ch
A	Planning Issue.	27.10.21	MS	CAW
B	Updated to latest Site Layout, SL.01 revision B.	15.11.21	MWP	CAW
C	Updated to latest Site Layout, SL.01 revision C	10.02.22	RT	CAW
D	Updated to latest Site Layout, SL.01 revision D	28.04.22	MWP	CAW
E	Updated to latest Site Layout, SL.01 revision E	06.07.22	MWP	CAW
F	Updated to latest Site Layout, SL.01 revision F	13.07.22	RT	CAW

Project **Berewood Waterlooile Phase 3B-8**
Drawing **Affordable Housing Layout**

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Dwg no.	AHL01			Scale	1:500 at A1
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Status	PLANNING				
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