

**Democratic Services****Reply to:** Amy Barnes**Ext:** 1522**Direct Line:** 01993 861522**Email:** [amy.barnes@westoxon.gov.uk](mailto:amy.barnes@westoxon.gov.uk)

9 June 2020

**SUMMONS TO ATTEND****MEETING:** CABINET**PLACE:** TO BE HELD VIA VIDEO CONFERENCING BECAUSE OF SOCIAL DISTANCING REQUIREMENTS AND GUIDANCE (see [note](#))**DATE:** WEDNESDAY 17 JUNE 2020**TIME:** 2.00 PM

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**Members of the Cabinet**

Councillors: James Mills (Leader); Toby Morris (Deputy Leader); David Harvey; Jeff Haine; Norman MacRae MBE and Michele Mead

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**RECORDING OF MEETINGS**

The law allows the council's public meetings to be recorded, which includes filming as well as audio-recording. Photography is also permitted.

As a matter of courtesy, if you intend to record any part of the proceedings please let the Committee Officer know before the start of the meeting.

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**A G E N D A****1. Notice of Decisions at the meeting held on Wednesday 27 May 2020 ([attached](#))****2. Apologies for Absence****3. Declarations of Interest**

To receive any declarations of interest from Councillors relating to items to be considered at the meeting, in accordance with the provisions of the Council's Local Code of Conduct, and any from Officers.

**4. Participation of the Public****Purpose:**

To receive any submissions from members of the public, in accordance with the Council's Rules of Procedure.

**5. Receipt of Announcements****Purpose:**

To receive any announcements from the Leader of the Council or Members of the Cabinet.

**6. Heylo Affordable Housing Funding Request (Report of the Strategic Housing and Development Officer – [copy attached](#))**

Purpose:

To consider an opportunity to provide funding to develop a partnership with Heylo to establish a programme of delivery of affordable shared ownership homes in West Oxfordshire.

Recommendations:

- (a) That the Council considers the opportunity to partner with Heylo to develop a programme to provide additional shared ownership affordable housing in West Oxfordshire by using Section 106 receipts together with Growth Deal grant funds;
- (b) That the Council agrees in principle to provide funding for an emerging programme to be negotiated by Heylo with housing developers active in West Oxfordshire; and
- (c) That Council be recommended to approve an addition to the Capital Programme in respect of the proposed shared ownership scheme of £1.2m with £0.75m funded via the Growth Deal and the balance funded from the Affordable Housing Fund.

**7. Local Development Scheme Update and Statement of Community Involvement (Report of the Planning Policy Manager – [copy attached](#))**

Purpose:

To approve an update of the Council's Local Development Scheme (LDS) and to agree the release of additional funds from the Council's unallocated Housing and Planning Delivery Grant (HPDG) to support the final stages of the preparation and adoption of the Garden Village Area Action Plan (AAP) and other Supplementary Planning Documents (SPDs) as set in the updated LDS. To also agree an addendum to the Council's adopted Statement of Community Involvement (SCI) to take account of the exceptional circumstances presented by Covid-19.

Recommendations:

- (a) That the updated Local Development Scheme attached at Annex A to the report be approved;
- (b) That Council be recommended to approve the release of £132,000 from the Council's unallocated Housing and Planning Delivery Grant (HPDG) to support the Area Action Plan and Supplementary Planning Documents through to formal adoption; and
- (c) That the Statement of Community Involvement addendum attached at Annex B be approved.

**8. Affordable Housing Draft Supplementary Planning Document (Report of the Report of the Planning Policy Manager – [copy attached](#))**

Purpose:

To agree that a draft Affordable Housing Supplementary Planning Document (SPD) is published for the purposes of a six-week public consultation.

Recommendation:

That the draft Affordable Housing Supplementary Planning Document (SPD) attached at Annex A to the report is published for a six-week period of public consultation.

**9. Community Facilities Grants (Report of the Business Manager Contracts – [copy attached](#))**

Purpose:

To consider applications for grant aid from the Community Facilities Grants Scheme.

Recommendation:

That Community Facilities Grants be awarded in accordance with the recommendations set out in Annex A to the report.

**10. Award of Contract for the Supply and Installation of Pulastic Sports Hall Floor at Chipping Norton Leisure Centre (Report of the Business Manager Contracts – [copy attached](#))**

Purpose:

To report the outcome of the tendering exercise and seek approval for the appointment of the main contractor.

Recommendations:

- (a) That approval is granted for the appointment of Sport and Play limited as the Main Contractor; and
- (b) That Council be recommended to amend the Capital Programme 2020/21 to reflect the increased budget requirements as set out in the financial implications of the report, to be financed from capital underspend.

**11. Leisure Management Contractor Financial Support (Report of the Business Manager Contracts – [copy attached](#))**

Purpose:

To seek approval to waive management fee payments and to provide financial support for the Council's Leisure Management Contractor.

Recommendations:

- (a) That a variation to the Leisure Management contract be authorised to (i) Suspend management fee payments from the contractor to the Council at a cost of £276,096; and (ii) Authorise a payment to the contractor totalling £263,581; and
- (b) That the Chief Financial Officer be requested to conduct a review of the budget and the Medium Term Financial Strategy at the earliest opportunity and to report to Cabinet and Council.



Chief Executive

This agenda is being dealt with by Amy Barnes Tel: (01993) 861522  
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Note: Councillors will be sent an invitation to the meeting via Cisco Webex. Members of the public may view the meeting via [Facebook Live](#). A Facebook account is not required.

## WEST OXFORDSHIRE DISTRICT COUNCIL

### CABINET

Record of decisions taken at the meeting of the **Cabinet** held via video conferencing on **Wednesday 27 May, 2020** at 2.00pm.

### PRESENT

Councillors: James Mills (Leader); Toby Morris (Deputy Leader); Jeff Haine, David Harvey, Norman MacRae MBE and Michele Mead.

Also in Attendance: Councillors Richard Bishop, Jill Bull, Nathalie Chapple, Harry Eaglestone, Duncan Enright, Hilary Fenton, Ted Fenton, Andy Graham, Steve Good, Liz Leffman, Dan Levy, Martin McBride, Elizabeth Poskitt, Alex Postan, Carl Rylett and Harry St John.

Officers in Attendance: Giles Hughes (Chief Executive); Philip Alway (Chief Finance Officer); Jon Dearing (Group Manager Resident Services); Mandy Fathers (Business Manager Operational Services); Frank Wilson (Executive Director, Finance); Keith Butler (Head of Democratic Services) and Amy Barnes (Senior Strategic Support Officer).

#### 1. NOTICE OF DECISIONS

**RESOLVED:** That the record of the decisions taken at the meeting held on Wednesday 18 March 2020, copies of which had been circulated, be approved and signed as a correct record.

#### 2. APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillor Rosa Bolger.

#### 3. DECLARATIONS OF INTEREST

There were no declarations of interest from Members or Officers relating to matters to be considered at the meeting.

#### 4. PARTICIPATION OF THE PUBLIC

No submissions were received from the public in accordance with the Council's Rules of Procedure.

#### 5. RECEIPT OF ANNOUNCEMENTS

##### 5.1 Update on Non-essential Retail Businesses

Councillor Morris announced that all non-essential retail outlets would be allowed to reopen on 15 June 2020, subject to them completing risk assessments and installing relevant measures to make them Covid 19 secure. He advised that the Council had managed to secure £98,000 funding from the government's Reopening High Streets Safely fund. Councillor Morris explained that work had already started to enable shopping areas to reopen in the District but there was still a lot of work to do. He assured Members that plans were in place to undertake the work and he would keep colleagues updated as to progress.

##### 5.2 Covid 19 - Council response

Councillor Mead advised that a poster had been produced and published via the Council's website and social media outlets which detailed the number of residents assisted by officers and Members during the current crisis. When the poster was printed the number of

residents contacted by telephone was 2177 but that figure had risen since and an additional 554 vulnerable residents had been contacted by Councillors, whom Councillor Mead expressly thanked. She advised that the list of vulnerable residents was updated regularly and it was important to remember that many individuals would continue to need support when the country entered the recovery phase.

In response to a question from Councillor Leffman, Councillor Mead confirmed that the leaflets contained contact details of organisations and assistance groups for each area and if Charlbury was interested in creating a similar leaflet, Councillor Leffman should direct her query to the Shared Healthy Communities Manager, Mrs McCulloch. In addition, she reminded Members that Councillors could obtain information for their own area from either herself or the Healthy Communities team.

In response to a question from Councillor Enright, Councillor Mead clarified that she was unaware of the leaflet produced by the Witney Land Army and could not therefore comment on its content.

### 5.3 Area Action Plan / Garden Village Presentation

Councillor Haine updated Members that the Area Action Plan and the presentation for the Garden Village was proceeding and work ongoing. He assured the meeting that he would keep Councillors informed of progress.

### 5.4 Climate Change Consultation

Councillor Harvey advised that the Climate Change consultation was going ahead in West Oxfordshire and he hoped the results would be available in time for the next Climate Action Group meeting in June.

In response to a question from Councillor Rylett, Councillor Harvey advised that he was unable to give an update on the 'Elementa Report' or decide what could be discussed at the next meeting of the group until he had spoken to the Climate Action Manager. As reported at a previous meeting, Ms Scott had been unwell and, although was now recovering, was on a phased return to work, and Councillor Harvey did not want to add to her workload unnecessarily. He confirmed that he would be speaking to Ms Scott the following day to discuss the work and that the next meeting of the Group was scheduled for 16 June. Councillor Harvey also wished any other staff members and colleagues who were recovering from illness a speedy return to health.

### 5.5 Thanks to Ubico, new Police Superintendent and the Windrush Riverbank repairs

Councillor MacRae firstly paid tribute to the Council's colleagues at Ubico for their hard work in ensuring that the waste collections continued and areas stayed clean and tidy. He also mentioned the dedication of two West Oxfordshire employees Emma and Sian who had worked tirelessly with the team to maintain standards of services.

Councillor MacRae advised the meeting of the newly appointed Superintendent for West Oxfordshire & Cherwell, Superintendent Emma Garside. He thanked outgoing Superintendent Mark Johns, for his service to the District.

Finally, Councillor MacRae was pleased to announce that the temporary barriers being installed on the banks of the River Windrush in Witney would be in place by the end of the following week. Contractors had encountered a minor delay due to some materials being unavailable because of the Covid 19 crisis but this had now been overcome.

In response to a question from Councillor Leffman, Councillor MacRae confirmed that he had placed a request for a new structure diagram to be produced.

Councillor Graham asked the Leader a question relating to the reopening of markets in the District as he had been made aware of an alleged breach in the rules at Carterton. In response, Councillor Mills advised that he had been made aware of the issue but reminded Members that the market in question was the responsibility of Carterton Town Council. He stated that he would, however, be seeking further advice in due course and reminded Councillor Graham that this section of the meeting should be reserved for questions relating to the announcements made previously.

6. APPROVAL OF CONTRACT AWARD FOR REVENUES AND BENEFITS MANAGEMENT SYSTEM

The Cabinet received and considered the report of the Group Manager Resident Services, which advised of the result of a recent tendering exercise to implement a new Revenues and Benefits Management System. The system would enable the Council and its partners to deliver effective, efficient and modern Revenues and Benefits Services for the benefit of the Council and its customers.

The administration and collection of Council Tax, Business Rates, Housing Benefit, Council Tax Support and the recovery of benefit overpayments was administered within Resident Services.

Both Cotswold District and West Oxfordshire District Councils used the same software supplier Northgate to administer this work, which had been in place for some years. The Forest of Dean District Council utilised software supplied by Civica to administer its work. There were significant variations in the cost paid by each Council providing an opportunity for savings with a joint procurement.

Other benefits of moving to a single supplier included more effective management of the systems across the three authorities, a reduction in training overheads, reduced testing time and officer resource, reduction in resource overtime and overall reduction in costs relating to annual Support and Maintenance charges.

An 'official journal of the European Union' (OJEU) compliant tender exercise had been undertaken using the Crown Commercial Services – Data and Solutions (RM3821) framework, in partnership with Forest of Dean and Cotswold District Councils. The evaluation of bids involved a two stage process of assessment and the results of the tender exercise were detailed in full at section 2 of the report.

Based on the tender submissions received, the report recommended that the contract be awarded to Civica UK Limited.

The report also outlined the number of ways the partners could split the costs of the new system and the notable savings arising. Each partner was starting from different positions in respect of costs of existing provision and would face differing implementation programmes. A breakdown of existing costs and proposed costs for each authority were provided in full at section 3 of the report. Explanation for the differing costs was also provided along with options for splitting the cost based on an equal split, a split based on caseload, a division of running costs and implementation costs for each authority or a hybrid option based on best estimate and a savings split on caseload.

After consultation between respective Chief Finance Officers and Cabinet Portfolio holders for Finance the report recommended that Hybrid option 1 represented the best balance between the costs, savings and investment return outcomes for all partner Councils. It

recognised the different implementation costs whilst also recognising the pre-existing software cost base at respective partners, thereby not penalising them for prior efficiency programmes. This option would provide one partner with a significantly higher return on investment but this was due to their low implementation costs due to no data migration requirement.

There were a number of alternative options available to Members including retaining the three separate systems across the partnership, or upgrading and enhancing existing systems. However these options had been discounted because they would fail to deliver revenue savings and any enhancements would not be viable from a cost perspective.

Councillor Morris introduced the report and highlighted the benefits and savings this award would provide. He signposted Members to the tendering processes undertaken and the various options considered. He therefore proposed the recommendations as outlined in the report and this was seconded by Councillor Mills.

**DECISIONS:**

- (a) That the contract for the Revenues and Benefits Management system be awarded to Civica UK Limited; and
- (b) That option (d1) as set out in paragraph 3.7 of the report be confirmed for the split between partners of the costs and savings.

**REASONS:** To enable the Council and its partners to deliver effective, efficient and modern Revenues and Benefits Services for the benefit of the Council and its customers.

**OPTIONS:** None appropriate.

7. DISCRETIONARY BUSINESS GRANTS

The Cabinet received and considered the report of the Group Manager Resident Services, which advised that the Government had announced a further round of Covid 19 support related Business Grants on 1 May 2020. Guidance on the Discretionary Business Grant scheme was received on 14 May 2020 and the report formally requested agreement of the eligibility criteria, timescales, application approach, authorisation protocols and delegations and to confirm the process.

During presentation of the item it was confirmed that Councillor Derek Cotterill had, in his capacity of Chairman of the Finance and Management Overview and Scrutiny Committee, consented to the waiving of call-in for this item, to enable the decisions to be implemented with immediate effect.

In March 2020, in reaction to the closedown of most UK businesses as part of the Covid-19 related 'lockdown', the Government announced a package of measures aimed at supporting businesses with the financial impact. Amongst those measures were two schemes of Business Grant funding (the Small Business Grant Fund and the Retail, Hospitality and Leisure Grant Fund (the 'original scheme') aimed at smaller businesses who were liable for Business Rates.

In order to offer a similar form of support to small businesses that did not necessarily have a Business Rate liability but had fixed property costs, on 1 May 2020, a further (discretionary) scheme was announced. The guidance and financial arrangements were published on 14 May 2020 and attached as Annex A to the report.

The report provided a definition of the types of businesses that these grants were aimed at, as defined in guidance by the Department for Business, Energy & Industrial Strategy (BEIS), and the criteria to be satisfied was detailed at section 2 of the report.

Funding for the scheme was to be taken from within the grant allocation of the 'original scheme'. The maximum level that could be utilised was 5% of the projected expenditure calculated from the Delta Data Return completed by the Council on 4 May 2020.

There was discretion within the scheme, so an alternative option would be to assist businesses not referred to in the guidance as being 'primarily and predominantly aimed at', however, officers felt this would increase demand for grants and impact upon the value of grant available for individual businesses. Reducing the value of grants could reduce the effectiveness of the grant as the value might not be sufficient to enable small businesses to fund their fixed property costs.

Councillor Morris proposed the report and highlighted the significant impact that the Covid 19 pandemic had had on the business community, not just in West Oxfordshire but across the country. He congratulated the government on its swift response in assisting business but recognised that there were many who had not been eligible for help. He also noted that this funding would not enable the Council to assist everyone who had missed out on initial funding and therefore, the scheme had needed a carefully considered response.

Councillor Harvey stated that he had been impressed with the response from small businesses who were grateful to the Council for distributing help to them and he passed on his gratitude to the teams involved. Many small businesses had been extremely worried about their futures in the middle of March and the support they had received from the Council had been fundamental. Councillor Harvey seconded the recommendations in the report.

Councillor Graham added his support to Councillor Harvey's comments and had been impressed with the manner in which officers had overcome early teething problems with the scheme. He felt this was a good scheme and would make a difference to smaller businesses. He raised a query regarding fraud and asked if there was any evidence of fraud being detected within schemes like this and how the Council could learn from that. In addition, he asked for clarification on the minimum amount of funding that could be awarded.

In response, Councillor Morris advised that the scheme before Councillors had been risk assessed appropriately for fraud and had been a collaboration with Internal Audit officers and the Corporate Fraud Officer. In addition, the Council would be utilising the appropriate government software to identify any instances of fraud. With regards to a minimum grant award, Councillor Morris explained that he was unable to say at this stage because the number of applications likely to be received was unknown.

The report advised that the Council's maximum expenditure in relation to the Discretionary Business Grants Scheme was £1,254,500 with a guideline that given the limited level of funding, it was anticipated that the Council would not wish to make, or any, payments above £10,000.

Councillor Leffman reiterated the comments made previously and recognised that there were many small businesses in her Ward that could benefit from the scheme. She queried how the scheme would be communicated to the business community as many were very small enterprises.

In response Councillor Mills thanked the Business Development Officer who had been working hard to send out regular newsletters to businesses and this had proven to be a key source of information to them. Officers had been encouraging businesses to sign up to the newsletter and the number of subscribers was growing.

In addition, Councillor Morris encouraged all Members to talk to the business owners in their Wards and encourage them to sign up to the mailing list for information. The scheme would also be publicised widely on the website and social media streams.



The Leader reiterated that work was continuing to evolve on the Business Recovery Phase of the current crisis and there was a lot that Members could do to support West Oxfordshire going forwards. He reminded the meeting that this was a fantastic part of the world to live and work in and businesses of all sizes should be supported to assist in the growth of the area.

**DECISIONS:**

- (a) That the eligibility criteria be approved, as set out in paragraphs 2.1 and 2.2 of the report;
- (b) That the business-type priorities be approved, as set out in paragraphs 2.3 and 2.4;
- (c) That the process and application window proposals be adopted, as set out in paragraphs 2.5 and 2.6;
- (d) That authority to determine grant applications and awards be delegated to the Group Manager Resident Services, following consultation with the Cabinet Member for Resources; and
- (e) That, for the reasons set out in paragraph 2.8, and with the consent of the Chairman of the Finance and Management Overview and Scrutiny Committee, the above decisions be implemented immediately.

**REASONS:** To Protect the environment whilst supporting the local economy.

**OPTIONS:** None appropriate.

8. APPOINTMENT OF REPRESENTATIVES TO OUTSIDE BODIES

The Cabinet received and considered the report of the Head of Democratic Services seeking the appointment of representatives to outside bodies for 2020/2021.

The Leader outlined the report and explained that a number of Councillors had responded, indicating that they were either happy to remain a representative on their respective groups or requesting specific appointments to cease. As a result of these requests, Councillor Mills advised Members of the following proposed changes whereby (i) Councillor Bull to replace Councillor Owen on the Oxfordshire Joint Health Overview & Scrutiny Committee; (ii) Councillor Coul to replace Councillor Owen on the School Organisation Stakeholder Group; and (iii) Councillor Postan to replace Councillor Ted Fenton on the Oxfordshire Growth Board Scrutiny Panel.

Following a question, Councillor Mills confirmed that he would ask officers to clarify when Councillor Enright's term of office for the Witney Educational Foundation would end.

**DECISION:** That representatives be appointed to outside bodies as detailed in the [Appendix](#) to these minutes.

**REASONS:** Cabinet considered the representatives appointed would enhance the Council's involvement in community organisations and its aim to encourage partnership working.

**OPTIONS:** None appropriate.

The meeting closed at 2.35 pm

Leader of the Council

**WEST OXFORDSHIRE DISTRICT COUNCIL**  
**REPRESENTATIVES ON OUTSIDE BODIES 2020 – 2021**

<b>OUTSIDE BODY</b>	<b>NUMBER OF REPRESENTATIVES</b>	<b>REPRESENTATIVE(S)</b>
		<b>2020/2021</b>
1. The Burford School Foundation (4 year term of office as Trustee)	2	Derek Cotterill (to 2022) Andrew Beaney (to 2024)
2. Charlbury Conservation Area Advisory Committee	2	Andy Graham Liz Leffman
3. Chipping Norton Theatre – Council of Management	1	Andy Graham
4. Radcot Conservation Area Advisory Committee	1	Suzi Coul
5. Cotswold AONB Conservation Board	1	Nigel Colston
6. West Oxfordshire Local Advisory Board (GLL Better)	1	Michele Mead
7. Oxford Airport Consultative Committee	2	Elizabeth Poskitt Harry St John
8. Oxfordshire Association of Local Councils	1	Derek Cotterill
9. Oxfordshire Buildings Trust	1	Elizabeth Poskitt
10. Oxfordshire Community Foundation: Adviser to Grants Panel	1	Michele Mead

<b>OUTSIDE BODY</b>	<b>NUMBER OF REPRESENTATIVES</b>	<b>REPRESENTATIVE(S)</b>  <b>2020/2021</b>
11. Oxfordshire County Council Pension Fund Committee	2 District Council representatives appointed through Leaders Group	Alaa Al-Yousuf
12. Oxfordshire Environment Partnership	1	Ted Fenton
13. Oxfordshire Joint Health Overview & Scrutiny Committee	1	Jill Bull Hilary Fenton (Standing Deputy)
14. Wild Oxfordshire	1	Andrew Coles and/or Harry St John
15. Oxfordshire Partnership Board (Appointments by Office)	1	James Mills
16. Oxfordshire Play Association	Unrestricted	Jill Bull Laetisia Carter Elizabeth Poskitt
17. Oxfordshire Playing Fields Association	3	Andrew Beaney Owen Collins Hilary Fenton
18. Community First (Oxfordshire)	1	Michele Mead
19. Oxfordshire Safer Communities Partnership	1	Norman MacRae
20. School Organisation Stakeholder Group	1	Suzi Coul Maxine Crossland (Substitute)
21. Thames Valley Police and Crime Panel	1	Norman MacRae

<b>OUTSIDE BODY</b>	<b>NUMBER OF REPRESENTATIVES</b>	<b>REPRESENTATIVE(S)</b>
		<b>2020/2021</b>
22. Burford Traffic Advisory Committee	2	Derek Cotterill Neil Owen
23. Chipping Norton Traffic Advisory Committee	2	Mike Cahill Geoff Saul
24. Eynsham Traffic Advisory Committee	2	Ed James Dan Levy
25. Witney Traffic Advisory Committee	2	Andrew Coles Toby Morris
26. Woodstock Traffic Advisory Committee	2	Julian Cooper Elizabeth Poskitt
27. Traffic Penalty Tribunal Joint Committee	2	Norman MacRae David Harvey
28. Volunteer Link-Up	1	Jane Doughty
29. West Oxfordshire Community Safety Partnership	1	Norman MacRae
30. West Oxfordshire Landlords Forum	5	Julian Cooper Jane Doughty David Harvey Harry St John Geoff Saul
31. Witney CCTV Management Group	1	Toby Morris David Harvey (Deputy/Observer) Ted Fenton (Substitute)
32. Witney Educational Foundation (4 year term of office as Trustee)	2	Duncan Enright (to December 2024) Toby Morris (to December 2023)
33. Citizens Advice West Oxfordshire Management Committee	1	Hilary Fenton

OUTSIDE BODY	NUMBER OF REPRESENTATIVES	REPRESENTATIVE(S)
		2020/2021
34. World Heritage UK	1	Julian Cooper
35. LGA General Assembly (Appointment by Office)	1	James J F Mills Toby Morris (Deputy)
36. South East England Councils (SEEC)	1	James J F Mills Toby Morris (Deputy)
37. Oxfordshire Leaders Group (Appointment by Office)	1	James J F Mills Toby Morris (Deputy)
38. Oxfordshire Growth Board (Appointment by Office)	1	James Mills Toby Morris (Deputy)
39. Oxfordshire Growth Board Scrutiny Panel	3	Julian Cooper Derek Cotterill Alex Postan
40. Oxfordshire Growth Board Housing Sub-Group	1  Plus 1 substitute	Jeff Haine Toby Morris (substitute)
41. Oxfordshire Growth Board Infrastructure Sub-Group	1  Plus 1 substitute	Jeff Haine Toby Morris (substitute)
42. Oxfordshire Growth Board Spatial Planning Sub-Group	1  Plus 1 substitute	Jeff Haine Toby Morris (substitute)
43. South West Audit Partnership Board – Member Representative	1	Jane Doughty



**WEST OXFORDSHIRE  
DISTRICT COUNCIL**

## **WEST OXFORDSHIRE DISTRICT COUNCIL**

Name and date of Committee	<b>Cabinet – Wednesday 17 June 2020</b>
Report Number	<b>Agenda Item No. 6</b>
Subject	<b>Heylo Affordable Housing Funding Request</b>
Wards affected	All
Accountable member	Councillor Jeff Haine, Cabinet Member for Strategic Planning Email: jeff.haine@westoxon.gov.uk
Accountable officer	Murry Burnett Strategic Housing and Development Officer Tel: 01993 861716; Email: murry.burnett@publicagroup.uk
Summary/Purpose	To consider an opportunity to provide funding to develop a partnership with Heylo to establish a programme of delivery of affordable shared ownership homes in West Oxfordshire.
Annexes	None
Recommendations	<ul style="list-style-type: none"><li>(a) That the Council considers the opportunity to partner with Heylo to develop a programme to provide additional shared ownership affordable housing in West Oxfordshire by using Section 106 receipts together with Growth Deal grant funds;</li><li>(b) That the Council agrees in principle to provide funding for an emerging programme to be negotiated by Heylo with housing developers active in West Oxfordshire; and</li><li>(c) That Council be recommended to approve an addition to the Capital Programme in respect of the proposed shared ownership scheme of £1.2m with £0.75m funded via the Growth Deal and the balance funded from the Affordable Housing Fund.</li></ul>
Corporate priorities	Affordable Housing provision
Key Decision	N/A
Exempt	No
Consultees/ Consultation	None

## **1. BACKGROUND**

- 1.1. During 2019 the Council gave agreement to the principle of providing top-up funding alongside grant funding from the Oxfordshire Growth Deal to increase opportunities for additional affordable housing and to make it more competitive with other grant streams.
- 1.2. In May 2020, Cabinet gave consent for a partnership with Heylo to provide four additional shared ownership homes at Colwell Green, Witney (Crest Nicholson development).
- 1.3. This partnership requires top-up funding from the Council of £15,000 per unit to be applied together with £25,000 of Oxfordshire Growth Deal grant funding.
- 1.4. A funding agreement is currently being drawn up for this scheme.
- 1.5. Throughout the Growth Deal programme it has proven difficult to achieve additional affordable housing by acquiring open market homes from developers. Heylo have developed a model and relationships with developers that has been successful nationwide in achieving this.
- 1.6. Post COVID-19, the Growth Deal is anticipating ways to be able to support recovery in the housing market. Agreement from MHCLG for the Growth Deal to be more flexible in its grant rates is being sought.

## **2. MAIN POINTS**

- 2.1. Heylo seek to establish a working relationship with developers whereby they can negotiate quickly with confidence that the supporting grant funding is already agreed in principle.
- 2.2. Being a high property value area, it is harder for Heylo to negotiate with developers using more traditional grant funding streams. By providing top-up funding, the Council would be enhancing Heylo's position in meeting the expectations of developers to enable open market homes to be sold as shared ownership.
- 2.3. This request is for the Council to agree in principle to provide top-up funding at a similar level to that already agreed for the four homes at Colwell Green i.e. £15,000 per unit in order to develop a programme of delivery of further shared ownership homes. The level of top-up funding can be reviewed and flexed +/- depending on market conditions and programme opportunities.
- 2.4. Both the Growth Deal grant and Council top-fund are recyclable. As the homeowner increases their level of ownership of the property the funding is returned to be made available for further investment in affordable housing. Initially it is returned to Heylo and if after 3 years they have not been able to reinvest the funds it is returned to the Council or Growth Board. This arrangement is in place for the initial 10 years from date of the funding agreement for any particular scheme. However Heylo indicate that at present only 1.5% approx. of their shared ownership leaseholders increase their equity in any given year.
- 2.5. Although at the outset it is difficult to forecast the exact number of homes, Heylo anticipate that over the current third year 2020/21 and anticipated fourth 2021/22 year of the Growth Deal a programme of 30 homes can be achieved.
- 2.6. The Council retains flexibility to review its involvement and benchmark against other forms of affordable housing delivery in West Oxfordshire and neighbouring Oxfordshire Local Authority's to ensure that value is being achieved.

### **3. FINANCIAL IMPLICATIONS**

- 3.1. Assuming that a programme of 30 such homes can be achieved the Council would be required to contribute £450,000 from its affordable housing fund over financial years 2020/21 and 2021/22. The current position of the affordable housing fund is there are uncommitted funds of £3.47m. The £450,000 would need to be included in the capital programme.
- 3.2. The Growth Deal grant for 30 shared ownership homes is £750,000 over financial years 2020/21 and 2021/22. Current arrangements are that it is forward funded by the local authorities pending recovery via draw-down from Government the following March. This would also need to be included in the capital programme.
- 3.3. Discussions are currently taking place with Homes England to explore the possibility of the Growth Deal funds being drawn down at the point they are required to be issued to the RP. If agreed this would remove the need for the £750,000 Growth Deal funds to be forward funded by the Council.

### **4. LEGAL IMPLICATIONS**

- 4.1. Funding agreements based on the template that will be finalised for the Colwell Green scheme would be required. This template is currently being considered by the Councils legal team.

### **5. ALTERNATIVES/OPTIONS**

- 5.1. As previously stated, acquisition of open market homes from developers for affordable housing has not been a successful route during the Growth Deal programme to date.
- 5.2. If market conditions change other opportunities for delivery may arise. Hence the inclusion of flexibility for the Council to review its involvement to ensure this remains a good route to facilitate more affordable housing.

### **6. BACKGROUND PAPERS**

- 6.1. None





WEST OXFORDSHIRE  
DISTRICT COUNCIL

## WEST OXFORDSHIRE DISTRICT COUNCIL

Meeting	<b>Cabinet: Wednesday 17 June 2020</b>
Report Number	<b>Agenda Item No. 7</b>
Subject	<b>Local Development Scheme (LDS) Update and Approval of Addendum to Statement of Community Involvement</b>
Wards affected	ALL
Accountable member	Cllr Jeff Haine Cabinet Member for Strategic Planning Email: <a href="mailto:jeff.haine@westoxon.gov.uk">jeff.haine@westoxon.gov.uk</a>
Accountable officer	Chris Hargraves, Planning Policy Manager Tel: 01993 861686; Email: <a href="mailto:Chris.Hargraves@publicagroup.uk">Chris.Hargraves@publicagroup.uk</a>
Summary/Purpose	To approve an update of the Council's Local Development Scheme (LDS) and to agree the release of additional funds from the Council's unallocated Housing and Planning Delivery Grant (HPDG) to support the final stages of the preparation and adoption of the Garden Village Area Action Plan (AAP) and other Supplementary Planning Documents (SPDs) as set in the updated LDS. To also agree an addendum to the Council's adopted Statement of Community Involvement (SCI) to take account of the exceptional circumstances presented by Covid-19.
Annexes	<a href="#">Annex A</a> – Local Development Scheme (2020 – 2023) <a href="#">Annex B</a> – Statement of Community Involvement addendum
Recommendations	a) That the updated Local Development Scheme attached at <a href="#">Annex A</a> to the report be approved; b) That Council be recommended to approve the release of £132,000 from the Council's unallocated Housing and Planning Delivery Grant (HPDG) to support the Area Action Plan and Supplementary Planning Documents through to formal adoption; and c) That the Statement of Community Involvement addendum attached at <a href="#">Annex B</a> be approved
Corporate priorities	To maintain and enhance West Oxfordshire as one of the best places to live, work and visit in Great Britain and to meet the current and future needs of residents.
Key Decision	No
Exempt	No
Consultees/ Consultation	None

## **I. BACKGROUND**

- 1.1. Members will be aware that a Local Development Scheme (LDS) is required under section 15 of the Planning and Compulsory Purchase Act 2004 (as amended by the Localism Act 2011).
- 1.2. The LDS must specify (among other matters) the documents which, when prepared, will comprise the Local Plan for the area. The LDS must be made available publicly and kept up to date, being revised at least annually or more frequently where the need arises.
- 1.3. The Council's most recent LDS was approved in January 2020, however since then, a number of issues have arisen including not least the current public health emergency, which mean that it is necessary to agree a further revision to the LDS.
- 1.4. This report explains the necessary changes and also identifies the need for additional funds to be released from the Council's unallocated Housing and Planning Delivery Grant (HPDG) to support the final stages of the preparation and adoption of the Garden Village Area Action Plan (AAP) and other Supplementary Planning Documents (SPDs).
- 1.5. The report also seeks approval of a minor addendum to the Council's Statement of Community Involvement (SCI) which was approved in February 2020. This is necessary to reflect the fact that at present, because of Covid-19 restrictions, it is not possible to make hard copy documents available for inspection in line with legislative requirements.

## **2. LOCAL DEVELOPMENT SCHEME UPDATE (2020 – 2023)**

- 2.1. Attached at [Annex A](#) (beginning on [page 6](#)) is an updated LDS which covers the period June 2020 – June 2023. Key issues to note are as follows.

### **West Oxfordshire Local Plan 2040**

- 2.2. National policy requires Local Plans to be kept up to date with any review to be completed within 5 years of adoption. The current West Oxfordshire Local Plan 2031 was adopted in September 2018 and an update will therefore need to be in place by September 2023.
- 2.3. Working back from that date, the following indicative dates are expected to apply to the plan review:
  - Informal engagement (Regulation 18) – Sept 2021 – Sept 2022
  - Publication of pre-submission draft Local Plan (Regulation 19) – Sept 2022
  - Submission for examination (Regulation 22) – Feb 2023
  - Examination – May 2023
  - Adoption – Sept 2023
- 2.4. National policy states that strategic policies (such as those contained within a Local Plan) should look ahead over a minimum period of 15 years from the date of adoption. As such, it is anticipated that the new West Oxfordshire Local Plan is likely to have an end-date of 2040.
- 2.5. At this point, it is envisaged that the review of the West Oxfordshire Local Plan will largely stem from the Oxfordshire Plan 2050 and underlying evidence base including in relation to future housing needs.
- 2.6. In undertaking the review of the Local Plan, the Council will continue to work closely with the other Oxfordshire local authorities through the Oxfordshire Growth Board in order to align plan making across the county in an effective and collaborative manner.

### **Garden Village Area Action Plan (AAP)**

- 2.7. Following a successful ‘preferred options’ consultation in August/October 2019, Officers had hoped to be in a position to formally publish the final submission draft AAP in March/April 2020 however that has not been possible for a number of reasons and the AAP is now expected to be reported to Cabinet/Council in July 2020.
- 2.8. The following dates are therefore expected to now apply through to adoption.
- Publication of pre-submission draft AAP (Reg 19) – Aug/Sept 2020
  - Submission for examination (Reg 22) – Oct 2020
  - Examination – Dec 2020
  - Adoption – March 2021

### **Community Infrastructure Levy (CIL)**

- 2.9. In February 2020, Cabinet and Council agreed that a new CIL draft charging schedule should be the subject of statutory consultation prior to submission and independent examination.
- 2.10. This had been due to take place in March/April 2020 but has been postponed in light of the Covid-19 situation. At the current time it is hoped that the consultation can be recommenced in June 2020 with the following indicative dates expected to apply.
- Consultation on CIL draft charging schedule – June/July 2020
  - Submission for examination (Reg 22) – September 2020
  - Examination – November 2020
  - Adoption – January 2021

### **Supplementary Planning Documents (SPDs)**

- 2.11. The delays to the AAP and CIL outlined above and the Covid-19 situation in general have had an impact on the timing of the Council’s seven proposed SPDs.
- 2.12. Updated key dates are set out in the table below.

<b>Document</b>	<b>Initial consultation</b>	<b>Further consultation</b>	<b>Adoption</b>
West Eynsham Development Framework	July 2018 (complete)	Sept 2020	December 2020
East Chipping Norton Development Framework	January 2019 (complete)	Sept 2020	December 2020
East Witney Development Framework	June 2019 (complete)	Sept 2020	December 2020
North Witney Development Framework	Oct 2020	Jan 2021	April 2021
Developer Contributions	July 2020	Oct 2020	January 2021
Affordable Housing	June 2020	Oct 2020	January 2021
Woodstock Community and	N/a – already undertaken by	Aug 2020	Nov 2020

Document	Initial consultation	Further consultation	Adoption
Infrastructure Delivery Plan	Community First Oxfordshire on behalf of the Blenheim Estate during 2019		

### 3. STATEMENT OF COMMUNITY INVOLVEMENT (SCI) - ADDENDUM

- 3.1. The Council's Statement of Community Involvement (SCI) explains how local communities and other stakeholders will be engaged in the preparation of the Local Plan and other related documents. It also provides information about how local communities and other stakeholders will be engaged in relation to the determination of planning applications.
- 3.2. The Council's most recent SCI was approved in February 2020 and ordinarily would not be considered again so soon. However, recent guidance published by central Government has clarified that in order to ensure compliance with legislative requirements during the Covid-19 pandemic, local authorities may wish to review/update their SCI.
- 3.3. A particular example is the physical availability of hard copy documents which must be made available for inspection in appropriate locations at the formal 'Regulation 19' stage of plan making.
- 3.4. The District Council makes hard copies available at a variety of locations including the District Council Office and all local libraries. As these are currently closed to the public and could potentially remain so for some time, it is considered appropriate to prepare an addendum to the approved West Oxfordshire SCI to reflect the fact that whilst the District Council will make all reasonable efforts to ensure the availability of hard copy documents in accordance with legislative requirements, in some instances this may not be possible and alternative arrangements will need to be put into place.
- 3.5. It could for example be possible to display a poster on the door of a closed library to provide contact details for the Council's planning team who could then seek to make hard copies available upon request for those who do not have access to the internet.
- 3.6. A short addendum to this effect is attached at [Annex B \(page 25\)](#).

### 4. FINANCIAL IMPLICATIONS

- 4.1. In a previous report to Cabinet in May 2012, Members agreed to establish an earmarked local plan reserve of £500,000 from the unallocated Housing and Planning Delivery Grant (HPDG).
- 4.2. The original allocation has now been exhausted primarily on the Local Plan, but more recently has also been used to fund the supporting technical evidence needed to support the Garden Village AAP and other SPDs.
- 4.3. Taking the AAP through to adoption will necessitate additional costs associated with technical evidence, legal advice/support and the fees of the Planning Inspectorate once the examination process has started (expected to be from October 2020 onwards).
- 4.4. Estimated costs are as follows:
  - Eynsham transport strategy (c. £25,000)
  - West Eynsham access strategy (c. £15,000)
  - Eynsham area Infrastructure Delivery Plan (c. £13,000)
  - Sustainability Appraisal (c. £9,000)
  - Habitat Regulations Assessment (c. £5,000)

- Programme Officer costs (c. £5,000)
- Planning Inspectorate costs (c. £35,000)
- Legal advice/costs (c. £25,000)

- 4.5. Based upon the remaining workload, it is therefore requested that Members allocate an additional sum of £132,000 to support the AAP and SPD through to formal adoption. This money can be allocated from the Council's Housing and Planning Delivery Grant (HPDG) balance.
- 4.6. In addition, there may be a requirement to undertake a piece of work to develop a masterplan for Hanborough Station. This is currently being scoped out and any additional need for resources will be brought back to this committee when the cost to the Council is known.

## **5. LEGAL IMPLICATIONS**

- 5.1. The preparation and maintenance of an up to date Local Development Scheme (LDS) is a legislative requirement. The Council is required to comply with legislative requirements in respect of plan making and development management. The proposed addendum to the SCI is intended to ensure that the exceptional circumstances presented by the Covid-19 pandemic are recognised, with appropriate measures put into place to ensure legislative compliance.

## **6. RISK ASSESSMENT**

- 6.1. The report raises no significant risks. Failure to maintain an up to date LDS could put the Council at risk of legal challenge through the plan making process. Failure to comply with legislative requirements in respect of plan making and development management would also present a risk of challenge.

## **7. EQUALITIES IMPACT**

- 7.1. The report raises no specific implications for any particular equality strand.

## **8. CLIMATE CHANGE IMPLICATIONS (IF REQUIRED)**

- 8.1. The report raises no specific implications in relation to climate change although the Local Plan review referred to clearly presents an opportunity to address the climate emergency through appropriate development plan policies.

## **9. ALTERNATIVE OPTIONS**

- 9.1. No alternatives have been considered.

## **10. BACKGROUND PAPERS**

- 10.1. None.

Annex A

## **West Oxfordshire Local Development Scheme (LDS)**

**June 2020**

## Contents

1.	Introduction.....	3
2.	West Oxfordshire Local Plan 2040.....	3
3.	Oxfordshire Cotswolds Garden Village Area Action Plan (AAP).....	4
4.	Community Infrastructure Levy (CIL).....	4
5.	Supplementary Planning Documents.....	5
6.	Neighbourhood Planning .....	6
7.	Statement of Community Involvement (SCI).....	7
8.	LDF Monitoring Report.....	7
9.	LDS availability and updates.....	8
	Appendix I – Document Profiles .....	10
	Appendix 2 – Overall Timetable .....	19

## **1. Introduction**

- 1.1 This is the West Oxfordshire District Council Local Development Scheme (LDS). It explains what planning policy documents the Council already has in place and what will be prepared during the three-year period June 2020 – June 2023.

## **2. West Oxfordshire Local Plan 2040**

- 2.1 The current West Oxfordshire Local Plan 2031 was formally adopted on 27 September 2018. The plan carries full weight in the determination of planning applications, providing an overall framework for growth in the period up to 2031.
- 2.2 National policy requires local plans to be kept up to date and a review of the Local Plan will therefore be needed in due course. At this point, it is envisaged that the review of the West Oxfordshire Local Plan will largely stem from the Oxfordshire Plan 2050<sup>1</sup> and underlying evidence base including in relation to future housing needs.
- 2.3 National policy states that strategic policies (such as those contained within a Local Plan) should look ahead over a minimum period of 15 years from the date of adoption. As such, it is anticipated that the new West Oxfordshire Local Plan is likely to have an end-date of 2040.
- 2.4 Assuming the new Local Plan is adopted by September 2023 (i.e. five years from the date of adoption of the current plan) the following indicative dates are expected to apply:
- Informal engagement (Regulation 18<sup>2</sup>) – Sept 2021 – Sept 2022
  - Publication of pre-submission draft Local Plan (Reg 19) – Sept 2022
  - Submission of pre-submission draft Local Plan (Reg 22) – Feb 2023
  - Examination – May 2023
  - Adoption – September 2023
- 2.5 In undertaking the review of the Local Plan, the Council will continue to work closely with the other Oxfordshire local authorities through the Oxfordshire Growth Board in order to align plan making across the county in an effective and collaborative manner.

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<sup>1</sup> <https://oxfordshireplan.org/>

<sup>2</sup> The Town and Country Planning (Local Planning) (England) Regulations 2012



### **3. Oxfordshire Cotswolds Garden Village Area Action Plan (AAP)**

- 3.1 A key element of the adopted Local Plan is the allocation of land to the north of the A40 near Eynsham for a new garden village of around 2,200 homes together with business space and other supporting uses and facilities. The proposal is being supported by central Government through its locally led garden village, towns and cities programme.
- 3.2 Development of the garden village is being led by a separate Area Action Plan (AAP) which, when adopted will form part of the statutory development plan for West Oxfordshire alongside the Local Plan 2031.
- 3.3 Following a successful 'preferred options' consultation in August/October 2019, the District Council had hoped to be in a position to formally publish the final submission draft AAP in March/April 2020 however that has not been possible for a number of reasons and the AAP is now expected to be reported to Cabinet/Council in July 2020.
- 3.4 The following dates are therefore now expected to apply through to adoption.
- Publication of pre-submission draft AAP (Reg 19) – August/September 2020
  - Submission of pre-submission draft AAP (Reg 22) – October 2020
  - Examination – December 2020
  - Adoption – March 2021
- 3.5 Further information on the purpose, scope and timing of the AAP is set out at Appendix I.

### **4. Community Infrastructure Levy (CIL)**

- 4.1 The community infrastructure levy (CIL) is a charge that can be applied to new developments in order to help pay for supporting infrastructure. Most new development which creates net additional floor space of 100 square metres or more, or creates a new dwelling, is potentially liable for the levy.
- 4.2 The levy only applies in areas where a local authority has consulted on, and approved, a charging schedule which sets out its levy rates and has published the schedule on its website.
- 4.3 The Council previously published a draft CIL charging schedule in March 2015 and a revised charging schedule in January 2017 however neither were progressed through to adoption.
- 4.4 New viability evidence has recently been prepared and in February 2020, Cabinet and Council agreed that a new CIL draft charging schedule should be the subject of statutory consultation prior to submission and independent examination.

4.5 This had been due to take place in March/April 2020 but has been postponed in light of the Covid-19 situation. At the current time it is hoped that the consultation can be recommenced in June 2020 with the following indicative dates expected to apply.

- Consultation on CIL draft charging schedule **June/July 2020**
- Submission for examination **September 2020**
- Examination **November 2020**
- Adoption **January 2021**

## **5. Supplementary Planning Documents**

5.1 Supplementary planning documents do not form part of the statutory development plan but are important material considerations in the determination of planning applications. Their main purpose is to elaborate on specific local plan policies and explain in more detail how those policies will operate.

5.2 At present, the Council has two adopted SPDs including the West Oxfordshire Design Guide SPD adopted in 2016 and the Affordable Housing SPD adopted in 2007.

5.3 Seven new SPDs are currently proposed as follows:

- West Eynsham Development Framework<sup>3</sup>
- East Chipping Norton Development Framework<sup>4</sup>
- East Witney Development Framework<sup>5</sup>
- North Witney Development Framework
- Developer Contributions
- Affordable Housing
- Woodstock Community and Infrastructure Delivery Plan

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<sup>3</sup> Initial consultation held in Aug/Sept 2018

<sup>4</sup> Initial consultation held in Jan/March 2019

<sup>5</sup> Initial consultation held in Jun/July 2019

- 5.4 West Eynsham, East Chipping Norton, East Witney and North Witney are all allocated as Strategic Development Areas (SDAs) in the Local Plan 2031. The purpose of the proposed Development Framework for each site is to set out the Council's main aims and objectives for each site and the key parameters within which developers will be expected to work to bring the sites forward in a comprehensive and co-ordinated manner.
- 5.5 The Developer Contributions SPD is intended to provide additional clarity on the use of planning obligations and CIL and the Affordable Housing SPD will provide additional detail in respect of the delivery of affordable housing – a key issue for West Oxfordshire.
- 5.6 The Woodstock Community and Infrastructure Delivery Plan is intended to formalise work which was undertaken in 2019 by Community First Oxfordshire for the Blenheim Estate to identify, in consultation with the local community, the infrastructure needed to support planned growth at Woodstock.
- 5.7 Further information on the anticipated purpose, scope and timing of these SPDs is set out at Appendix I.
- 5.8 The District Council is also considering the development a further supplementary planning document in the form of a masterplan for Hanborough Station. However, as the scope, timing and resourcing of this are yet to be confirmed, it will need to be reflected in any subsequent update to the LDS.

## **6. Neighbourhood Planning**

- 6.1 Neighbourhood planning gives communities direct power to develop a shared vision for their neighbourhood and shape the development and growth of their local area.
- 6.2 There are currently five adopted Neighbourhood Plans in West Oxfordshire including:
- Chipping Norton Neighbourhood Plan (adopted 15 March 2016)
  - South Leigh Neighbourhood Plan (adopted 8 January 2019)
  - Shilton Neighbourhood Plan (adopted 2 September 2019)
  - Hailey Neighbourhood Plan (adopted 2 September 2019)
  - Eynsham Neighbourhood Plan (adopted 6 February 2020)
- 6.3 There are five other Neighbourhood Plans currently in progress including:
- Brize Norton Neighbourhood Plan
  - Broadwell Village Neighbourhood Plan
  - Charlbury Neighbourhood Plan
  - Milton-under-Wychwood Neighbourhood Plan
  - Woodstock Neighbourhood Plan

- 6.4 Because the progress and timing of neighbourhood plans are beyond the control of the District Council, the LDS does not include any information on their anticipated timetables. Further information can however be obtained from the District Council's website<sup>6</sup>.

## **7. Statement of Community Involvement (SCI)**

- 7.1 A Statement of Community Involvement (SCI) explains how local communities and other stakeholders will be engaged in the preparation of the Local Plan and other related documents. It also provides information about how local communities and other stakeholders will be engaged in relation to the determination of planning applications.
- 7.2 Local planning authorities are required to review their Statements of Community Involvement every 5 years. The Council's current SCI was adopted in February 2020<sup>7</sup> and will therefore need to be refreshed no later than February 2025, or sooner if required.

## **8. LDF Monitoring Report**

- 8.1 In accordance with national planning regulations the Council is required to produce a monitoring report addressing various matters including plan progress and implementation, neighbourhood planning, CIL (where applicable) and the duty to co-operate.
- 8.2 The Council's most recent monitoring report for the period 1<sup>st</sup> April 2018 – 31<sup>st</sup> March 2019 will be published in May 2020. A further monitoring report for the period 1<sup>st</sup> April 2019 – 31<sup>st</sup> March 2020 will be published by December 2020.

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<sup>6</sup> <https://www.westoxon.gov.uk/planning-and-building/planning-policy/neighbourhood-planning/>

<sup>7</sup> <https://www.westoxon.gov.uk/media/jo0g3prh/statement-of-community-involvement.pdf>

## 9. LDS availability and updates

- 9.1 The LDS must be made publicly available and kept up-to-date.
- 9.2 In terms of availability, a copy of this LDS is online at <https://www.westoxon.gov.uk/planning-and-building/planning-policy/local-development-framework/>
- 9.3 As circumstances allow, hard copies will also be made available in the following locations or on request:

West Oxfordshire District Council Offices Elmfield New Yatt Road Witney OX28 1PB Tel: 01993 861000 Open: Monday – Friday 9am to 5pm	Witney Town Centre Shop 3 Welch Way Witney OX28 6JH Tel: 01993 861000 Open: Monday – Friday 9am to 5pm	Witney Town Council Town Hall Market Square Witney OX28 6AG Tel: 01993 704379 Open: Monday – Friday 9am to 1pm, 2pm to 5pm
Carterton Town Council 19 Alvescot Road Carterton OX18 3JL Tel: 01993 842156 Open: Monday – Friday 9.30am to 4.30pm	Chipping Norton Town Council The Guildhall Chipping Norton OX7 5NJ Tel: 01608 642341 Open: Monday – Friday 9am to 1pm	Burford Visitor Information Centre 33 High Street Burford OX18 4QA Tel: 01993823558 Open: Monday – Saturday 9.30am to 5pm, Sunday 10am to 4pm
Bampton Library Old Grammar School Church View Bampton OX18 2NE Tel: 01993 850076	Burford Library 86A High Street Burford OX18 4QF Tel: 01993 823377	Carterton Library 6 Alvescot Road Carterton OX18 3JH Tel: 01993 841492

Charlbury Library Charlbury Community Centre Enstone Road Charlbury OX7 3PQ Tel: 01608 811104	Chipping Norton Library Goddards Land Chipping Norton OX7 5NP Tel: 01608 643559	Eynsham Library 30 Mill Street Eynsham OX29 4JS Tel: 01865 880525
North Leigh Library Memorial Hall Park Road North Leigh OX29 6SA Tel: 01993 882935	Stonesfield Library Village Hall Longore Stonesfield OX29 8EF Tel: 01993 898187	Witney Library Welch Way Witney OX28 6JH Tel: 01993 703659
Woodstock Library The Oxfordshire Museum Fletcher's House Park Street Woodstock OX20 1SN Tel: 01993 814124	Wychwood Library 29 High Street Milton-under-Wychwood OX7 6LD Tel: 01993 830281	

- 9.3 The LDS will be updated at least annually and more often if there are any significant changes in timescales or documents being prepared.

## Appendix I – Document Profiles

West Oxfordshire Local Plan 2040	
Status	Development Plan Document (DPD)
Overview	The Local Plan will set out the overall framework for future growth in West Oxfordshire to 2040. This is expected to include strategic policies dealing with the overall strategy for the pattern, scale and quality of development as well as non-strategic policies dealing with other matters including site allocations and development management policies.
Geographical coverage	District-wide
Timetable	<p>Informal engagement (Regulation 18 ) – <b>Sept 2021 – Sept 2022</b></p> <p>Publication of pre-submission draft Local Plan (Reg 19) – <b>Sept 2022</b></p> <p>Submission of pre-submission draft Local Plan (Reg 22) – <b>Feb 2023</b></p> <p>Examination – <b>May 2023</b></p> <p>Adoption – <b>September 2023</b></p>
Conformity	Prepared in conformity with the National Planning Policy Framework (NPPF) National Planning Practice Guidance (NPPG).
Management arrangements	Document production to be led by the Council's Planning Policy Team under the direction of the Planning Policy Manager.
Resource requirements	Internal resources comprise the Council's Planning Policy Team with input from other teams and services as appropriate. External resources will be drawn upon in terms of the production of supporting technical evidence.
Community engagement	Engagement to be carried out in accordance with the requirements of the adopted Statement of Community Involvement (SCI).

## Oxfordshire Cotswolds Garden Village Area Action Plan (AAP)

Status	Development Plan Document (DPD)
Overview	Supplements the Local Plan 2031 providing additional detail on the Oxfordshire Cotswolds Garden Village Strategic Location for Growth (SLG). The AAP will establish a vision for the garden village, supported by a series of core objectives and policies arranged on a thematic basis. A key focus of the AAP will be delivery and implementation.
Geographical coverage	Oxfordshire Cotswolds Garden Village Strategic Location for Growth (SLG) north of Eynsham
Timetable	<p>'Issues' consultation - <b>June 2018 (COMPLETE)</b></p> <p>'Preferred options' consultation – <b>Aug 2019 (COMPLETE)</b></p> <p>Final (pre-submission) draft AAP consultation – <b>August 2020</b></p> <p>Submission – <b>October 2020</b></p> <p>Examination hearings – <b>December 2020</b></p> <p>Adoption – <b>March 2021</b></p>
Conformity	Prepared in conformity with the National Planning Policy Framework (NPPF) National Planning Practice Guidance (NPPG) and the West Oxfordshire Local Plan (2031).
Management arrangements	Document production to be led by the Council's Planning Policy Team under the direction of the Planning Policy Manager.
Resource requirements	Internal resources comprise the Council's Planning Policy Team with input from other teams and services as appropriate. External resources will be drawn upon in terms of the production of supporting technical evidence.
Community engagement	Engagement on the preparation of the document to be carried out in accordance with the requirements of the adopted Statement of Community Involvement (SCI).



## West Eynsham Development Framework

Status	Supplementary Planning Document (SPD)
Overview	Intended to supplement the Local Plan 2031 providing additional detail on the West Eynsham Strategic Development Area (SDA). The SPD will include consideration of the site context, characteristics and opportunities, vision, objectives and key principles for development, quantum and mix of uses, supporting infrastructure requirements, transport and access arrangements, housing type, size and tenure mix, environmental and heritage considerations, design, delivery and implementation. This will be underpinned by an overall development framework plan.
Geographical coverage	West Eynsham Strategic Development Area (SDA)
Timetable	<p>'Issues paper' consultation – <b>July 2018 (COMPLETE)</b></p> <p>Draft SPD consultation – <b>September 2020</b></p> <p>Adoption – <b>December 2020</b></p>
Conformity	Prepared in conformity with the National Planning Policy Framework (NPPF) National Planning Practice Guidance (NPPG) and the West Oxfordshire Local Plan (2031)
Management arrangements	Document production to be led by the Council's Planning Policy Team under the direction of the Planning Policy Manager.
Resource requirements	<p>Internal resources comprise the Council's Planning Policy Team with input from other teams and services as appropriate.</p> <p>External resources will be drawn upon in terms of the production of supporting technical evidence.</p>
Community engagement	Engagement on the preparation of the document to be carried out in accordance with the requirements of the adopted Statement of Community Involvement (SCI).

## East Chipping Norton Development Framework

Status	Supplementary Planning Document (SPD)
Overview	Intended to supplement the Local Plan 2031 providing additional detail on the East Chipping Norton Strategic Development Area (SDA). The SPD will include consideration of the site context, characteristics and opportunities, vision, objectives and key principles for development, quantum and mix of uses, supporting infrastructure requirements, transport and access arrangements, housing type, size and tenure mix, environmental and heritage considerations, design, delivery and implementation. This will be underpinned by an overall development framework plan.
Geographical coverage	East Chipping Norton Strategic Development Area (SDA)
Timetable	<p>'Issues paper' consultation – <b>January 2019 (COMPLETE)</b></p> <p>Draft SPD consultation – <b>September 2020</b></p> <p>Adoption – <b>December 2020</b></p>
Conformity	Prepared in conformity with the National Planning Policy Framework (NPPF) National Planning Practice Guidance (NPPG) and the West Oxfordshire Local Plan (2031)
Management arrangements	Document production to be led by the Council's Planning Policy Team under the direction of the Planning Policy Manager.
Resource requirements	Internal resources comprise the Council's Planning Policy Team with input from other teams and services as appropriate. External resources will be drawn upon in terms of the production of supporting technical evidence.
Community engagement	Engagement on the preparation of the document to be carried out in accordance with the requirements of the adopted Statement of Community Involvement (SCI).

East Witney Development Framework	
Status	Supplementary Planning Document (SPD)
Overview	Intended to supplement the Local Plan 2031 providing additional detail on the East Witney Strategic Development Area (SDA). The SPD will include consideration of the site context, characteristics and opportunities, vision, objectives and key principles for development, quantum and mix of uses, supporting infrastructure requirements, transport and access arrangements, housing type, size and tenure mix, environmental and heritage considerations, design, delivery and implementation. This will be underpinned by an overall development framework plan.
Geographical coverage	East Witney Strategic Development Area (SDA)
Timetable	<p>'Issues paper' consultation – <b>June 2019 (COMPLETE)</b></p> <p>Draft SPD consultation – <b>September 2020</b></p> <p>Adoption – <b>December 2020</b></p>
Conformity	Prepared in conformity with the National Planning Policy Framework (NPPF) National Planning Practice Guidance (NPPG) and the West Oxfordshire Local Plan (2031)
Management arrangements	Document production to be led by the Council's Planning Policy Team under the direction of the Planning Policy Manager.
Resource requirements	<p>Internal resources comprise the Council's Planning Policy Team with input from other teams and services as appropriate.</p> <p>External resources will be drawn upon in terms of the production of supporting technical evidence.</p>
Community engagement	Engagement on the preparation of the document to be carried out in accordance with the requirements of the adopted Statement of Community Involvement (SCI).

North Witney Development Framework	
Status	Supplementary Planning Document (SPD)
Overview	Intended to supplement the Local Plan 2031 providing additional detail on the North Witney Strategic Development Area (SDA). The SPD will include consideration of the site context, characteristics and opportunities, vision, objectives and key principles for development, quantum and mix of uses, supporting infrastructure requirements, transport and access arrangements, housing type, size and tenure mix, environmental and heritage considerations, design, delivery and implementation. This will be underpinned by an overall development framework plan.
Geographical coverage	North Witney Strategic Development Area (SDA)
Timetable	Preliminary consultation – <b>October 2020</b>  Draft SPD consultation – <b>January 2021</b>  Adoption – <b>April 2021</b>
Conformity	Prepared in conformity with the National Planning Policy Framework (NPPF) National Planning Practice Guidance (NPPG) and the West Oxfordshire Local Plan (2031)
Management arrangements	Document production to be led by the Council's Planning Policy Team under the direction of the Planning Policy Manager.
Resource requirements	Internal resources comprise the Council's Planning Policy Team with input from other teams and services as appropriate.  External resources will be drawn upon in terms of the production of supporting technical evidence.
Community engagement	Engagement on the preparation of the document to be carried out in accordance with the requirements of the adopted Statement of Community Involvement (SCI).

Developer Contributions	
Status	Supplementary Planning Document (SPD)
Overview	Intended to provide further guidance on the Council's approach towards the use of and inter-relationship between planning obligations, planning conditions and the Community Infrastructure Levy (CIL).
Geographical coverage	District-Wide
Timetable	<p>Preliminary consultation – <b>July 2020</b></p> <p>Draft SPD consultation – <b>October 2020</b></p> <p>Adoption – <b>January 2021</b></p>
Conformity	Prepared in conformity with the National Planning Policy Framework (NPPF) National Planning Practice Guidance (NPPG) and the West Oxfordshire Local Plan (2031)
Management arrangements	Document production to be led by the Council's Planning Policy Team under the direction of the Planning Policy Manager.
Resource requirements	Internal resources comprise the Council's Planning Policy Team with input from other teams and services as appropriate.
Community engagement	Engagement on the preparation of the document to be carried out in accordance with the requirements of the adopted Statement of Community Involvement (SCI).

Affordable Housing	
Status	Supplementary Planning Document (SPD)
Overview	The SPD will provide additional detail on the Council's affordable housing requirements under Policy H3 of the Local Plan including mix, tenure, design standards, rent levels, nominations, rural exception sites, community-led housing, self and custom-build and partnership working with registered and non-registered providers.
Geographical coverage	District-Wide
Timetable	<p>Preliminary consultation – <b>June 2020</b></p> <p>Draft SPD consultation – <b>October 2020</b></p> <p>Adoption – <b>January 2021</b></p>
Conformity	Prepared in conformity with the National Planning Policy Framework (NPPF) National Planning Practice Guidance (NPPG) and the West Oxfordshire Local Plan (2031)
Management arrangements	Document production to be led by the Council's Housing Enabling Team under the direction of the Housing Enabling Manager.
Resource requirements	Internal resources comprise the Council's Housing Enabling Team with input from other teams and services as appropriate including Planning Policy.
Community engagement	Engagement on the preparation of the document to be carried out in accordance with the requirements of the adopted Statement of Community Involvement (SCI).

## Woodstock Community and Infrastructure Delivery Plan

Status	Supplementary Planning Document (SPD)
Overview	Intended to formalise work which was undertaken in 2019 by Community First Oxfordshire for the Blenheim Estate to identify, in consultation with the local community, the infrastructure needed to support planned growth at Woodstock.
Geographical coverage	Woodstock
Timetable	Draft SPD consultation – <b>August 2020</b>  Adoption – <b>November 2020</b>
Conformity	Prepared in conformity with the National Planning Policy Framework (NPPF) National Planning Practice Guidance (NPPG) and the West Oxfordshire Local Plan (2031)
Management arrangements	Document production to be led by the Council's Planning Policy Team under the direction of the Planning Policy Manager. The SPD will formalise work already undertaken on behalf of the Blenheim Estate through Community First Oxfordshire.
Resource requirements	The SPD will formalise work already undertaken on behalf of the Blenheim Estate through Community First Oxfordshire.
Community engagement	Engagement on the preparation of the document to be carried out in accordance with the requirements of the adopted Statement of Community Involvement (SCI).

## Appendix 2 – Overall Timetable

Document	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21
Garden Village Area Action Plan (AAP)			FC		S		H			A	
West Eynsham Development Framework SPD				FC			A				
East Chipping Norton Development Framework SPD				FC			A				
East Witney Development Framework SPD				FC			A				
North Witney Development Framework SPD					IC			FC			A
Developer Contributions SPD		IC			FC			A			
Affordable Housing SPD	IC				FC			A			
Woodstock Community and Infrastructure Delivery Plan			FC			A					
Key: IC = Informal Consultation; FC = Formal Consultation; S = Submission; H = Hearings; A = Adoption											

Document	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23
West Oxfordshire Local Plan 2040	IC												FC					S			H				A
Key: IC = Informal Consultation; FC = Formal Consultation; S = Submission; H = Hearings; A = Adoption																									



**Addendum to the West Oxfordshire District Council**

**Statement of Community Involvement (February 2020)**

This short statement is an addendum to the West Oxfordshire Statement of Community Involvement (SCI). It has been prepared to reflect the particular, exceptional circumstances presented by the Covid-19 pandemic.

In accordance with legislative requirements, the SCI commits the District Council in a number of instances to making physical hard copies of documents available for inspection at appropriate 'deposit' locations including the District Council's Offices and local libraries. This is to ensure that anyone who does not have access to the internet is not unreasonably disadvantaged.

As these deposit locations are likely to remain closed for a reasonable period of time or at least operating in a more limited manner, it may well be the case that the Council is unable to make hard copies of documents available as indicated in the adopted SCI.

In such instances, the Council commits to making all reasonable endeavours to provide hard copies of documents to those who may not be able to access electronic documents online.

This could include for example providing contact details in the locations where the physical, hard copy documents would normally be made available, so that people are able to make individual requests for hard copies to be made available.

These and other potential measures will be considered as appropriate, in order to ensure that no one group or individual is disadvantaged by not being able to access hard copy documents during the pandemic.



**WEST OXFORDSHIRE  
DISTRICT COUNCIL**

## **WEST OXFORDSHIRE DISTRICT COUNCIL**

Name and date of Committee	<b>Cabinet: Wednesday 17 June 2020</b>
Report Number	<b>Agenda Item No. 8</b>
Subject	<b>Affordable Housing Draft Supplementary Planning Document (SPD)</b>
Wards affected	ALL
Accountable member	Councillor Jeff Haine, Cabinet Member for Strategic Planning Email: <a href="mailto:jeff.haine@westoxon.gov.uk">jeff.haine@westoxon.gov.uk</a>
Accountable officer	Chris Hargraves, Planning Policy Manager Tel: 01993 861686; Email: <a href="mailto:Chris.Hargraves@publicagroup.uk">Chris.Hargraves@publicagroup.uk</a>
Summary/Purpose	To agree that a draft Affordable Housing Supplementary Planning Document (SPD) is published for the purposes of a six-week public consultation.
Annex	<a href="#">Annex A</a> – Draft Affordable Housing Supplementary Planning Document (SPD)
Recommendation	That the draft Affordable Housing Supplementary Planning Document (SPD) attached at <a href="#">Annex A</a> is published for a six-week period of public consultation.
Corporate priorities	To maintain and enhance West Oxfordshire as one of the best places to live, work and visit in Great Britain and to meet the current and future needs of residents.
Key Decision	No
Exempt	No
Consultees/ Consultation	None

## **I. BACKGROUND**

- I.1. The provision of affordable housing is a key issue for West Oxfordshire. Like the rest of the County, there is a significant difference between house prices and wages with even the cheapest properties being around 10 times higher than the lowest incomes.
- I.2. The Oxfordshire Strategic Housing Market Assessment (SHMA) published in 2014, identified the need for 274 affordable homes each year in West Oxfordshire in the period to 2031.
- I.3. In recognition of this, Policy H3 of the West Oxfordshire Local Plan 2031 seeks to boost the supply of affordable housing across the District in a number of ways including:
  - As a proportion of larger market housing schemes of 11 or more units (ranging from 35% - 50% depending on location;
  - Through financial contributions from smaller market housing schemes of 6-10 units within the Cotswolds AONB; and
  - Rural exception sites (RES).
- I.4. The intention is to provide further detail on the operation of Policy H3 through a separate Affordable Housing Supplementary Planning Document (SPD). The Council already has an Affordable Housing SPD in place but it was adopted in 2007 and therefore needs to be updated.
- I.5. An initial draft SPD is attached at [Annex A](#).
- I.6. Subject to the agreement of Members, the draft SPD will be published for consultation. Comments received will be taken into account in revising the SPD which will then be published for a further, final period of consultation later in the year.
- I.7. Subject to any final amendments, the SPD will then be adopted. Upon adoption, the new Affordable Housing SPD will replace the existing SPD (2007).

## **2. DRAFT AFFORDABLE HOUSING SPD**

- 2.1. The draft Affordable Housing SPD is attached at [Annex A](#). The overall objectives of the SPD are:
  - To provide clear and transparent guidance on the application of Local Plan Policy H3 and Core Objective 6 (CO6) to assist those proposing developments to make successful planning applications and improve the delivery rates of affordable housing in West Oxfordshire.
  - To deliver a better balance between the affordable housing need and the supply of affordable accommodation with particular reference to location, housing mix and tenure type proposed on developments.
  - To improve the quality and range of affordable housing options available within the District
  - To ensure that new affordable housing addresses the climate change emergency
  - To secure improved housing affordability through the application of a new 'Living Rent' for West Oxfordshire
  - To promote new and innovative approaches to the delivery of affordable housing
  - To help sustain and improve the vitality, vibrancy and quality of life of local communities

- 2.2. The document is split into the following main sections:
- Preface – background, status, scope of the document
  - Legislative and policy context
  - What is affordable housing?
  - Existing Affordable Housing Need and Provision in West Oxfordshire
  - Future Affordable Housing provision in West Oxfordshire
  - Affordable Housing Standards and Design Requirements
  - Viability
  - Delivery Mechanisms
  - New routes to delivery
  - Oxfordshire Housing and Growth Deal
  - Monitoring and Review
- 2.3. In terms of the size of new affordable homes, the draft SPD explains that the greatest level of need is for smaller 1 and 2-bed properties.
- 2.4. With regard to tenure, the SPD emphasises the need for predominantly rented forms of affordable housing including affordable rent. Developers are however encouraged to explore providing new affordable homes at social rent levels to provide a balanced mix of options and to increase affordability.
- 2.5. The draft SPD highlights that work is currently ongoing to explore a 'Living Rent' model for West Oxfordshire including the level of discount from market rent required to be realistic for local people having regard to typical household incomes. This will be incorporated into the final draft version of the document.
- 2.6. In respect of intermediate tenures, the draft SPD expresses a preference for shared-ownership although other forms of provision will be explored to ensure a suitable blend of tenures is provided to attract the widest mix of residents.
- 2.7. The remainder of the document deals with a number of specific issues including affordable housing standards and design requirements, accessibility and adaptability, space standards, zero-carbon, modern methods of construction, viability and delivery mechanisms. It also outlines a number of alternative routes to the delivery of new affordable homes in West Oxfordshire.

### **3. FINANCIAL IMPLICATIONS**

- 3.1. Minor costs arising from the proposed public consultation but this will be a primarily on-line exercise and is able to be met from existing budgets.

### **4. LEGAL IMPLICATIONS**

- 4.1. Once adopted the new Affordable Housing SPD will become a material consideration in relation to the determination of relevant planning applications.

### **5. RISK ASSESSMENT**

- 5.1. The report raises no significant risks.

**6. CLIMATE CHANGE IMPLICATIONS**

- 6.1. The report raises no specific implications in relation to climate change although the draft SPD does address the issue of zero-carbon in new build affordable homes.

**7. ALTERNATIVE OPTIONS**

- 7.1. No alternatives have been considered.

**8. BACKGROUND PAPERS**

- 8.1. None.

## **Affordable Housing Supplementary Planning Document 2020**

Consultation Draft

June 2020

## **Contents**

<b>1.0 Preface</b>	<b>4</b>
1.1 Background	4
1.2 Scope	5
1.3 Status	5
1.4 Consultation	5
<b>2.0 Legislative and Policy Context</b>	<b>6</b>
2.1 The NPPF	6
2.2 The West Oxfordshire Local Plan 2031	6
2.3 The West Oxfordshire Council Plan	6
<b>3.0 What is affordable housing?</b>	<b>7</b>
3.1 West Oxfordshire Definition	7
3.2 NPPF Definition	7
<b>4.0 Existing Affordable Housing Need and Provision in West Oxfordshire</b>	<b>10</b>
4.1 Affordable housing need	10
4.2 Current affordable housing provision – supply and type by location	11
<b>5.0 Future Affordable Housing provision in West Oxfordshire</b>	<b>12</b>
5.1 ‘Qualifying’ sites – When will affordable housing or a contribution toward affordable housing be required?	12
5.2 The size of affordable homes needed	15
5.3 Preferred Tenure Mix	16
5.4 Rural Exception sites and Entry Level Exception Sites	18
5.5 Self and custom-build	19
<b>6.0 Affordable Housing Standards and Design Requirements</b>	<b>20</b>
6.1 Design criteria	20
6.2 Accessibility and adaptability	20
6.3 Space Standards	21
6.4 Zero-carbon homes	22
6.5 Modern Methods of Construction (MMC)	25
<b>7.0 Viability</b>	<b>25</b>
7.1 Approach to viability considerations in West Oxfordshire	25

<b>8.0 Delivery Mechanisms</b>	<b>26</b>
8.1 S106 agreements	26
8.2 Timing of provision	26
8.3 Occupancy	27
8.4 Essential Local Workers (otherwise referred to as Key Workers)	27
8.5 Community-led housing	28
<b>9.0 New routes to delivery</b>	<b>30</b>
9.1 Blenheim approach	30
9.2 Partnerships with legacy landowners	30
<b>10.0 Oxfordshire Housing and Growth Deal</b>	<b>31</b>
<b>11.0 Monitoring and Review</b>	<b>31</b>
<b>Glossary of Terms</b>	
<b><u>Appendices</u></b>	
<b>Appendix 1 - Policy H3 Affordable Housing</b>	<b>33</b>
<b>Appendix 2 - Useful Contact Details</b>	<b>34</b>
<b>Appendix 3 - Example S106 Agreement</b>	<b>35</b>



## **Preface**

### **1.1 Background**

The District Council's current Affordable Housing Supplementary Planning Document (SPD) was published in 2007. Following adoption of the West Oxfordshire Local Plan 2031 and the publication of the 2018 National Planning Policy Framework (NPPF) there is now a need to revise and update the SPD.

The purpose of this draft Supplementary Planning Document (SPD) is to provide detailed guidance to support the local authority, developers, housing providers and local communities on how West Oxfordshire District Council will meet its objective of securing the delivery of affordable housing through the application of Local Plan Policy H3 – Affordable Housing and related core objectives.

The SPD will supplement the Local Plan and whilst this does not in itself make it policy, it will be a material consideration in the determination of planning applications.

The overall objectives of the SPD are:

- To provide clear and transparent guidance on the application of Policy H3 and CO6 to assist those proposing developments to make successful planning applications and improve the delivery rates of affordable housing in West Oxfordshire.
- To deliver a better balance between the affordable housing need and the supply of affordable accommodation with particular reference to location, housing mix and tenure type proposed on developments.
- To improve the quality and range of affordable housing options available within the District
- To ensure that new affordable housing addresses the climate change emergency
- To secure improved housing affordability through the application of a new 'Living Rent' for West Oxfordshire
- To promote new and innovative approaches to the delivery of affordable housing
- To help sustain and improve the vitality, vibrancy and quality of life of local communities

## 1.2 Scope

This draft SPD provides detailed guidance on how Policy H3 and Core Objective 6 of the WODC Local Plan will be implemented in order to support proposed development and help deliver sustainable communities. In particular, it contains guidance on the following:

- Developments where affordable housing will be sought – qualifying sites and thresholds
- Quantity of affordable homes needed
- Size and Mix of Affordable Homes
- Off-site provision / Financial contribution
- Viability
- Standards and Design
- Section 106 Agreements
- Nominations, Key Worker and Local connection provision
- Timing of Provision
- Occupancy
- Delivery Mechanisms
- Alternative Affordable Housing delivery routes

## 1.3 Status

This is the draft version of the Affordable Housing Supplementary Planning Document (SPD) and once adopted will be material consideration in the determination of relevant planning applications, replacing the current Affordable Housing SPD (2007).

Please see the Glossary at the end of the document for an explanation of the abbreviations and terms used in this document.

## 1.4 Consultation

The draft SPD will be the subject of public consultation for a period of six weeks. The consultation will run from :

\*\*\*\*\* insert dates\*\*\*\*\*

There are a variety of ways to respond to the consultation:

- Online by visiting \*\*\*\*\* wodc website link\*\*\*\*\*
- By emailing your response to: \*\*\*planningpolicy email\*\*\* ??
- By posting a response to: Affordable Housing SPD Consultation, Planning Policy, West Oxfordshire District Council, Elmfield, New Yatt Road, Witney, Oxon OX28 1PB

All comments received will be carefully considered and taken into account alongside any other relevant considerations including for example potential changes to national policy and a revised draft SPD will be published in autumn 2020 for a further, final period of public consultation before being formally adopted.

## 2.0 Legislative and Policy Context

### 2.1 The NPPF

The Government published the revised National Planning Policy Framework (NPPF) and accompanying Planning Practice Guidance (PPG) in July 2018. The framework requires local authorities to deliver a sufficient number and range of homes to meet the needs of present and future generations.

The NPPF states:

***‘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’.***

### 2.2 The West Oxfordshire Local Plan 2031

The West Oxfordshire Local Plan was formally adopted in September 2018. It seeks to provide at least 15,950 homes in the period 2011 – 2031 and identifies a significant need for new affordable housing.

Policy H3 relates to affordable housing and is set out in full at Annex 1. In short, the policy requires the provision of on-site affordable housing as part of larger market housing schemes of 11 or more units varying by location from 35% - 50%.

Smaller market housing schemes of 6-10 units within the Cotswolds AONB are required to make a financial contribution towards the provision of affordable housing within the District. The policy also addresses the issue of housing mix and the provision of affordable housing in rural areas including through rural exception sites.

Policy H3 is supported by Core Objective 6 (CO6) of the Local Plan which seeks to:

***‘Plan for an appropriate mix of new residential accommodation which provides a variety of sizes, types and affordability with special emphasis on the provision of homes for local people in housing need who cannot afford to buy or rent at market prices including those wishing to self-build, as well as homes to meet the needs of older people, younger people, black and minority ethnic communities, people with disabilities, families and travelling communities’.***

### 2.3 The West Oxfordshire Council Plan

Part of the vision of the current West Oxfordshire Council Plan is to meet the housing needs of the District’s changing population, securing the provision of market and affordable housing of a high quality for the wide range of householders making their home in West Oxfordshire.

### 3.0 What is affordable housing?

There is no singular definition of affordable housing.

#### 3.1 West Oxfordshire definition

The West Oxfordshire Local Plan defines affordable housing as ‘that which is affordable to those who cannot afford market priced housing locally to rent or purchase’. It is housing provided with either public or private subsidy for people who would otherwise be unable to resolve their housing requirements in the local housing market because of the relationship between housing cost and local incomes’.

#### 3.2 NPPF definition

The NPPF provides the following, specific definition:

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

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

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

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

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

A more detailed explanation of how each affordable housing tenure type works in practice in West Oxfordshire is given in the following table:

<b>Rental Housing</b>	
a) Social rented housing:	Social rented housing is housing owned and managed by registered providers, for which target rents are determined through the Government's rent policy for Social Rent. It may also include rented housing owned or managed by other persons and provided under equivalent rental arrangements to the above, as agreed with the local authority or with Homes England as a condition of grant. Typically social rented housing costs 50-60% of market rented housing.
b) Affordable Rent housing	<p>Let by private registered providers of social housing to households who are eligible for social rented housing. Affordable Rent housing must meet all of the following conditions:</p> <ul style="list-style-type: none"> <li>i. The rent must be no more than 80% of the local market rent (including service charges, where applicable) and not exceed the level of the Local Housing Allowance for the size of property, whichever is the lower;</li> <li>ii. the landlord is a registered provider, except where it is included as part of a Build to Rent scheme (in which case the landlord need not be a registered provider); and for Build to Rent schemes, Affordable Private Rent housing is expected to be the normal form of affordable housing provision.</li> </ul>
c) Rent to Buy	A government scheme to help first time buyers, or those returning to the market following relationship breakdown. Households are able to rent a home at 80% of the market value, providing an opportunity to build up a deposit. If after the initial five years of letting the landlord wishes to sell the property, the existing tenant should have the right of first refusal to buy it. Similarly, if after the first five years the tenant submits a request to buy their home, it is expected that the landlord would agree.
d) Build to Rent	Build to rent refers to purpose built housing that is 100% rented and can form part of a wider multi-tenure development scheme comprising flats or houses. Schemes will usually offer longer tenancy agreements of 3+ years and will be part of a professionally managed stock in single ownership and management control. The NPPF states that "20% is generally a suitable benchmark for the level of Affordable Private Rent homes to be provided (and maintained in perpetuity) in any Build to Rent scheme". The guidance also stipulates that Affordable Private Rent should be at least 20% cheaper than the rest of the scheme in line with the Affordable Rent product. In addition affordable units within Build to Rent developments are not expected to be managed by a registered

	<p>provider, but should be under common management control by the private operator managing the whole site / block. Affordable units should be distributed throughout the development and physically indistinguishable from the market rent homes within the development in terms of quality and size. Build to Rent developments will be secured under a S106 agreement details of which can be found in Appendix 3. Build to Rent market rent assessments should be carried out by Build to Rent Developers using the definition of the International Valuation Standards Committee as adopted by the Royal Institute of Chartered Surveyors. WODC reserve the right to benchmark this rate against evidence from a relevant local housing needs assessment and if necessary use this evidence to justify an amendment to the rate required. Equally, there is also provision for developers, in exception, to make a case seeking to differ from the benchmark.</p>
<b>Intermediate Housing</b> - Homes for sale and rent provided at a cost above social rent but below market sale and rent levels. It includes a range of low cost home ownership products for households who are not able to access home ownership through the market:	
a) Shared ownership:	<p>The purchaser buys a proportion of the value of the home, e.g. 50%, and the remaining share is kept by the freeholder which is usually a registered provider. A subsidised rent is paid on the remainder of the equity. The proportion offered for sale by the registered provider should not be fixed in advance, but tailored to the individual circumstances of the individual household. The initial equity share must be between 25% and 75% and the Council expects that at least 50% of each type and size of shared ownership units on each scheme should initially be sold at shares of 35% or below in order to help ensure affordability. When they can afford to, purchasers have the opportunity to 'staircase', i.e. to buy further equity shares until they own 100% of the property.</p>
b) Shared equity	<p>The purchaser acquires the whole of the property but effectively only pays a proportion of the value, e.g. 75%. The remaining 25% is secured by an equity loan without any rental obligation.</p>
c) Discount market sale	<p>Discount Market Sale is a low cost home ownership product where a new build property is purchased at a discounted price, usually around 20% of the market value, and aims to help low and middle earners get onto the property ladder.</p>
d) First Homes <sup>1</sup>	<p>The Government has recently consulted on a new First Homes policy which is intended to deliver discounted homes for local people. It is not clear at this point how this proposed policy will be taken forward but the Council will seek to address it prior to adoption of this draft SPD or through an addendum as appropriate.</p>

<sup>1</sup> <https://www.gov.uk/government/consultations/first-homes>

Housing which is not secured as affordable in perpetuity such as Starter Homes (included in the NPPF definition) does not materially contribute to meeting the identified need for affordable housing. The Council will therefore seek to ensure that affordable housing is secured as such in perpetuity. Consequently all types of affordable housing must include provision **either** to remain at an affordable price for future eligible households **or** for subsidy / sale proceeds to be recycled to provide alternative housing provision.

Prospective developers are recommended to contact the Council's planning and housing services at an early stage for more detailed advice on the provision of affordable housing in connection with particular development proposals, prior to submission of a planning application. Early discussion with planning officers helps ensure better quality applications are submitted.

Full details on pre-application advice include the application form and details of costs can be found on the Council website.<sup>2</sup>

The provision of affordable housing also requires consultation with the council's affordable housing development team. The team works closely with planning officers and registered providers to ensure new communities are sustainable and will input into the delivery, tenure mix, location and transfer arrangements with the chosen provider. Contact details for the team can be found in Appendix 2.

Where the affordable housing is to be transferred to a Registered Social Landlord (RSL) or Registered Provider (RP) detailed discussions should be held with them on the layouts and specifications e.g. Space standards. Any RSL / RP must be able to meet the Council's eligibility criteria, full details of which are available from the Council's Housing Services.<sup>3</sup>

## **4.0 Existing Affordable Housing Need and Provision in West Oxfordshire**

### 4.1 Affordable housing need

The provision of new housing in West Oxfordshire is a critically important issue and a recurring theme in the Local Plan. The Oxfordshire Strategic Housing Market Assessment (SHMA) 2014 identified the need for 660 homes per year over the plan period, of which 274 need to be affordable. Increasing delivery of the number, type and distribution of affordable housing for both rent and subsidised sale is therefore a key priority for West Oxfordshire.

Policy H3 of the West Oxfordshire Local Plan 2031 seeks to secure an increase in the supply of affordable homes by increasing the number of developments which should support affordable housing and increasing the number of affordable homes on those developments.

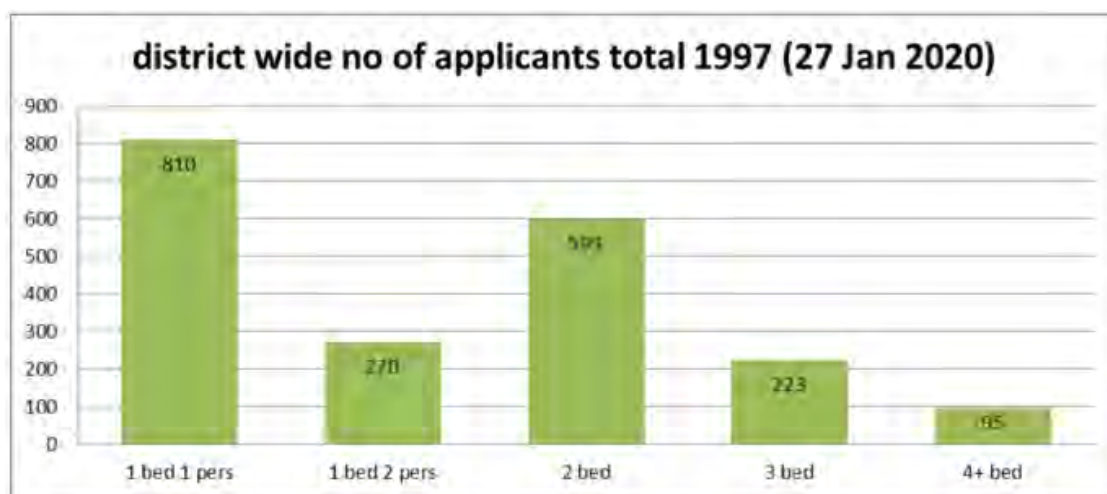
The Council also aims to widen the choice of dwelling size and tenures available to redress the imbalance in the housing market. Local Plan Policy H4 – Type and Mix of New Homes is a particularly relevant consideration in this respect.

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<sup>2</sup> <https://www.westoxon.gov.uk/planning-and-building/planning-permission/get-advice-on-your-application/>

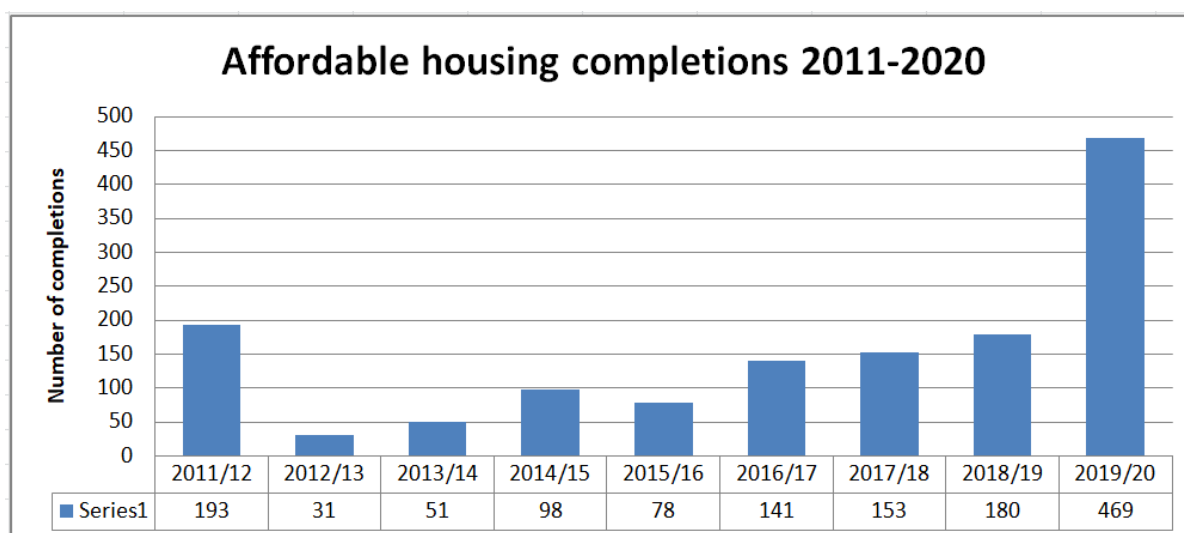
<sup>3</sup> <https://www.westoxon.gov.uk/housing/>

In addition to the level of need identified in the SHMA, the Council's housing register provides an indication of the level of affordable housing need in the District. The graph below shows the total number of applicants as of 27 Jan 2020 broken down by preference for particular property sizes.



#### 4.2 Current affordable housing provision – supply and type by location

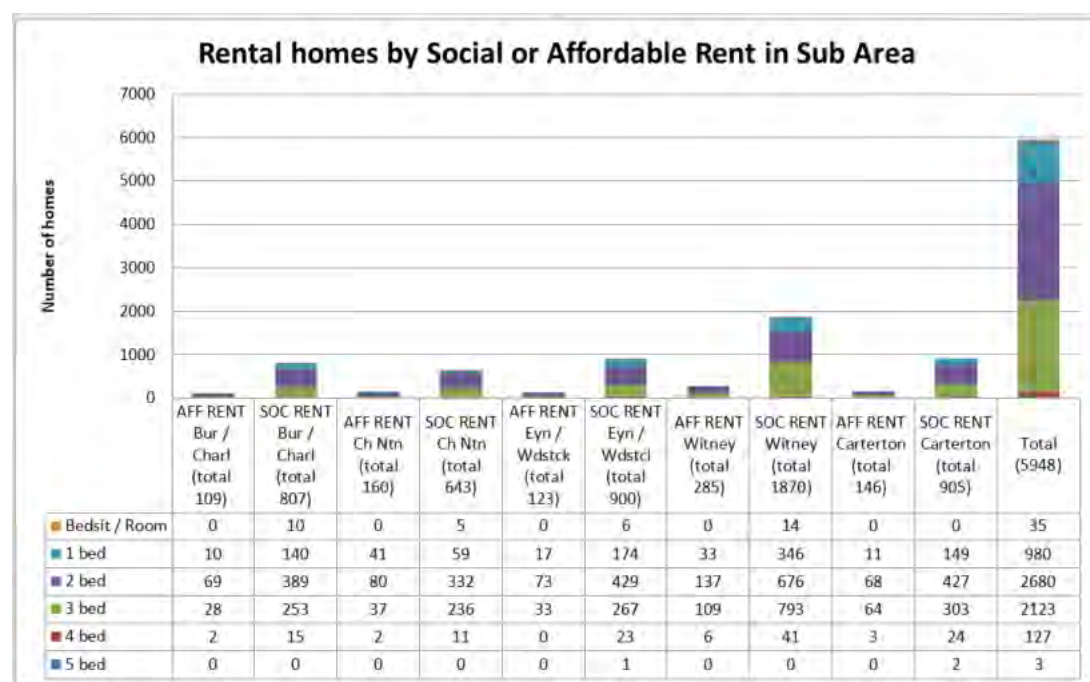
Delivery of both affordable and market housing in West Oxfordshire has fluctuated since the start of the Local Plan period 2011. The lower rates of affordable housing delivery in the early years can be attributed to a number of factors including wider economic conditions, development viability and national policy changes. WODC has continued to work closely with developers to accelerate delivery of housing in the district and there has been a steady increase in the number of affordable housing completions in the District since 2012/13 as shown below. This is expected to continue.



This increase in housing delivery demonstrates the positive approach to affordable housing by WODC and we will continue to seek innovative ways of working with developers to increase both the number and speed of affordable homes delivered across the District.



The table below shows the current levels of Social and Affordable Rental properties available in West Oxfordshire by sub-area. It can be seen that there is a predominance of social rented properties across all areas, in particular the Witney sub-area.



## 5.0 Future Affordable Housing provision in West Oxfordshire

### 5.1 'Qualifying' sites – when will affordable housing or a contribution towards affordable housing be required?

#### *On-site provision of affordable housing*

In accordance with the Local Plan, the Council will seek between 35% and 50% affordable housing on all qualifying sites except within the Cotswolds AONB area, where a financial contribution in lieu of on-site provision applies.

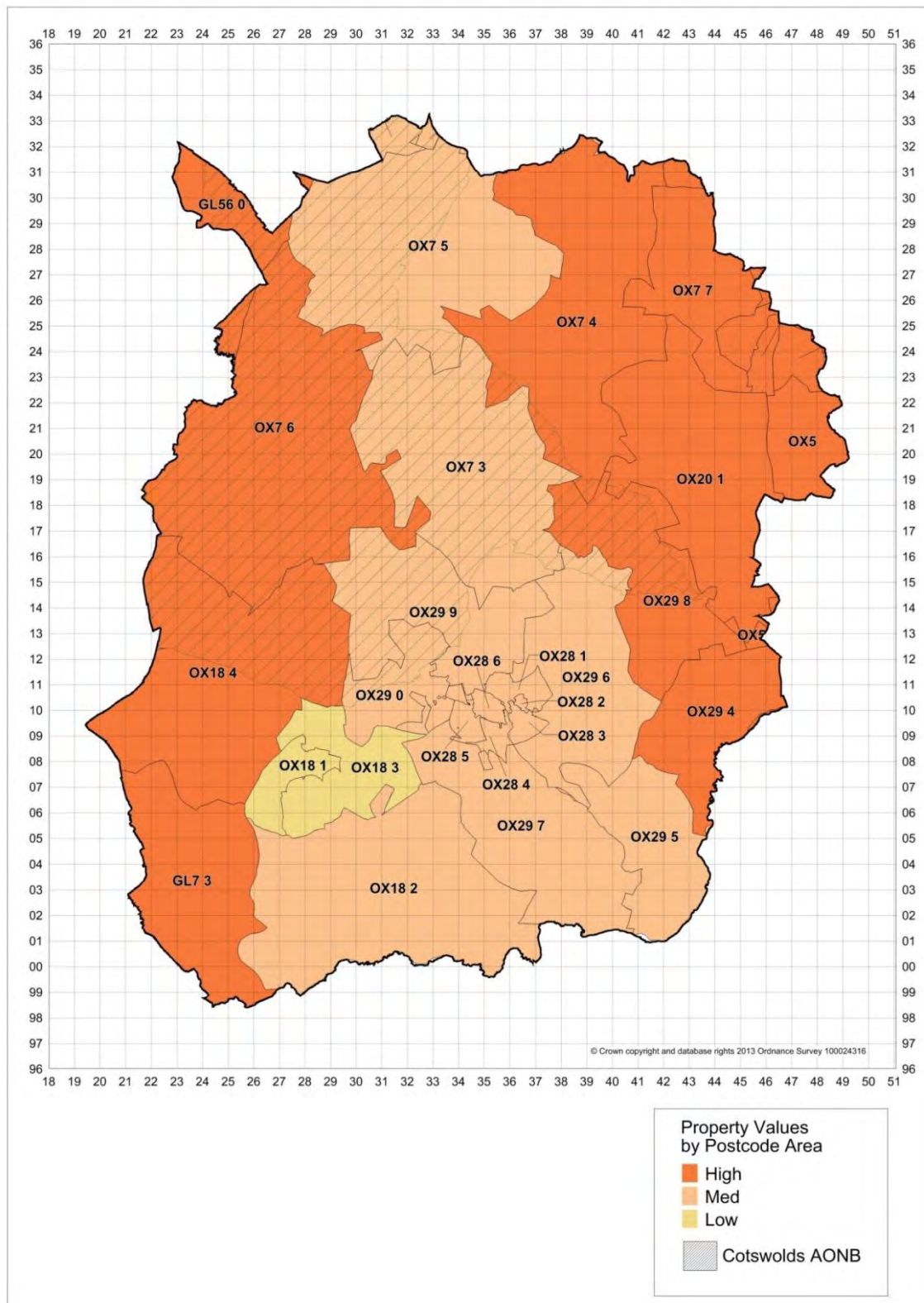
Policy H3 states that housing schemes of 11 or more dwellings, or which have a maximum combined gross floor space of more than 1,000m<sup>2</sup> will be required to provide affordable housing on-site as a proportion of the market homes as follows:

- High value zone – 50%
- Medium value zone – 40%
- Low value zone – 35%

The above requirement also applies to sheltered housing but a reduced level of provision will be sought in respect of extra-care housing due to viability, as follows:

- High value zone – 45%
- Medium value zone – 35%
- Low value zone – 10%

A map showing the value zones is available shown below:



### *Off-site Provision / Financial Contributions*

There are a number of circumstances in which the Council will or may accept a financial contribution towards affordable housing in lieu of on-site provision.

Under Policy H3, within the Cotswolds AONB, market housing schemes of 6-10 units and which have a maximum combined floor space of no more than 1,000m<sup>2</sup> will be required to make a financial contribution for off-site affordable housing provision within the District. This amount is £100 per m<sup>2</sup> based on the Gross Internal Area (GIA) of the proposed market units.

Policy H3 also recognises that in some instances, it may not be possible, even on larger market housing schemes, to deliver affordable housing on-site e.g. it is not physically possible or feasible, or there is evidence that a separate site may be more suitable to meet local need. In such circumstances, a financial contribution in lieu of on-site provision may be appropriate.

In some instances a combination of on-site and financial contribution may be appropriate and this will be determined on an individual site basis.

Financial contributions received from developers will be held in a specific affordable housing fund to support the provision of new affordable homes which will be administered by the Strategic Affordable Housing Team.

The financial contributions will be ring fenced to enable the Local Authority to provide stimulus to the affordable housing market by:

- local authority development including estate renewal; WODC are currently developing a parcel of land at Langford for affordable housing and funding can be used to increase the % of affordable units delivered on the site.
- support of a registered providers development; WODC are working with our registered providers to promote small sites in rural locations to meet local need. In general these rural exception sites will be to meet local need and would not normally be considered for development. Commuted sums can be used to increase the % of affordable units delivered and will reviewed on a case by case basis.
- housing purchased on the private market to be transferred to a registered provider; additionality is being sought from developers with funding through either the Growth Board or commuted sums.
- vacant properties bought back to use; WODC are interested in securing vacant properties to provide additional affordable housing particularly in our urban centres or Witney, Carterton and Chipping Norton
- other housing schemes that qualify under planning policy.

## 5.2 The size of affordable homes needed

The existing housing stock in West Oxfordshire is dominated by larger properties and the Council's aim is to redress this imbalance by providing smaller family homes for younger households and those wishing to downsize.

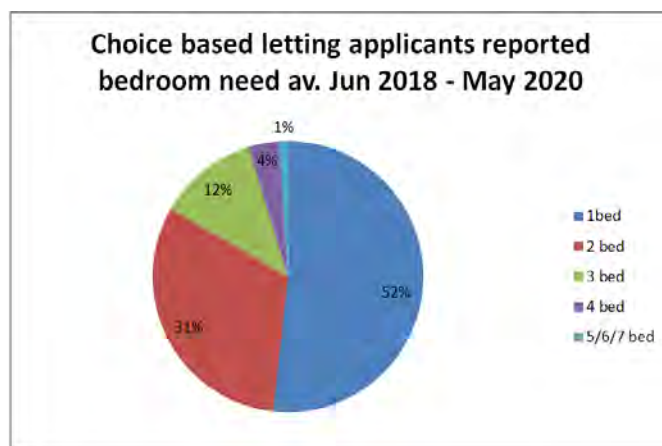
The Oxfordshire SHMA (2014) provides an indication of the size of affordable homes needed in West Oxfordshire (by bedroom size) in the period 2011 – 2031. This is as follows:

- 1-bedroom 28.4%
- 2-bedroom 34.7%
- 3-bedroom 30.4%
- 4+ bedroom 2.6%

This is reflected in the West Oxfordshire Local Plan which includes the following indicative size mix for affordable housing:

- 65% one and two-bedroomed homes
- 35% three and four-bedroomed homes

This indicative split is supported by the Council's Choice Based Lettings database<sup>4</sup> which shows that of those registered in need of affordable rented accommodation, the greatest requirement is for 1 and 2-bed properties.



1 bed	52%
2 bed	33%
3 bed	12%
4 bed	4%

<sup>4</sup> Homeseeker Plus data May 2020

Recent advice commissioned from ICENI in respect of planned growth at Eynsham<sup>5</sup> reaches a similar conclusion and suggests the greatest focus should be on 2 and 3-bed properties. Although these demand levels are constantly fluctuating, it can be seen that households in need of a one bedroom home contribute significantly higher demand.

As previously stated, the Local Plan seeks, as a guide, 65% one and two bedroom homes. This however provides an indication only and in negotiating the size of affordable homes to be provided, the Council will take account of local circumstances and any identified local needs. It is advisable when designing a mix of affordable housing on a new development that information on bedroom need is kept in mind.

### 5.3 Preferred Tenure Mix

WODC welcomes a mix of tenure for affordable housing to ensure a balanced community is delivered on each development. Developers are encouraged to commence discussions with Registered Providers at the earliest opportunity to understand the affordable housing type and tenure required for their proposed development to achieve this aim.

As a starting point, the West Oxfordshire Local Plan highlights a significantly greater need for rented accommodation than for the various forms of intermediate housing, with a ratio of 2:1 in favour of affordable rented homes. This is however a general guide only and the precise mix will be determined on a case by case basis. Further guidance is provided below.

#### *Social and Affordable Rent*

Due to the high property values in West Oxfordshire, access to affordable housing is a key challenge with the highest level of need being for rented accommodation including social and affordable rent.

The type of rental accommodation to be provided will be a matter for negotiation but as affordable rent levels are often unattainable for many residents, developers are encouraged to explore providing new affordable homes at social rent levels to provide a balanced mix of options and to increase affordability.

Where affordable rent is provided, Affordable rent levels should be set with reference to Local Housing Allowance levels and at no more than 80% of market rental taking into account the local context for the rent levels. Full details can be found on the MHCLG Policy statement on rents for Social Housing<sup>6</sup>.

#### *Build to Rent*

As a matter of principle, the Council will support the provision of purpose built, build to rent properties in sustainable, accessible locations. In accordance with national policy, affordable housing for rent (referred to as affordable private rent) will be the expected form of affordable housing provision.

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<sup>5</sup> <https://www.westoxon.gov.uk/media/mbwnzsw2/housing-strategy-advice-west-oxfordshire.pdf>

<sup>6</sup> [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/781746/Policy\\_Statement.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/781746/Policy_Statement.pdf)

### *A West Oxfordshire 'Living Rent'*

In addition to those looking for affordable rent or intermediate housing in West Oxfordshire there is a significant proportion of residents who are the “trapped middle” – middle income families who are in the private rental space but unable to save for home ownership.

WODC recognises the need to enable affordable homes for middle-income households who now rent and want to build up savings to buy a home. This can be either through shared ownership or outright purchase. Landlords are expected to encourage their tenants into home ownership within 10 years.

Under this initiative, homes will be offered on tenancies of a minimum of three years and tenants will be supported to save and given the option to buy their home on a shared ownership basis during their tenancy. They will also be given extra priority for other shared ownership homes.

WODC is currently undertaking a study to explore a Living Rent model for West Oxfordshire including the level of discount from market rent required to be realistic for local people having regard to typical household incomes.

Full details on the report will be available in Q3 2020.

### *Intermediate Housing and other affordable housing types*

WODC recognises the need for a balanced mix of affordable tenures and as described in Section 2, there are a number of different forms of affordable housing including a number of ‘intermediate’ products.

Of these intermediate tenures, WODC favours the provision of Shared Ownership as it provides a clear route to home ownership with occupants having the opportunity to increase their equity share over time. Typically, a person acquires a 25% share initially (with rent paid on the remaining 75%) and can eventually ‘staircase’ up to 100% ownership.

Other Shared Ownership models at 40% initial purchase levels have been supported on some developments in West Oxfordshire and developers are encouraged to consider shared ownership in their viability modelling as WODC consider it is the most accessible route to home ownership.

Whilst the Council’s preference is for shared-ownership properties, WODC recognises the need to offer a balanced mix of tenures on all developments and welcome early discussions between developers and RP’s to ensure a suitable blend of tenures is provided to attract the widest mix of residents.

This will include considered of shared equity, discount market sale properties, rent to buy and potentially in due course First Homes in line with the Government’s recent consultation.

Starter home provision will be supported in principle as part of a broader mix of affordable housing types and the Government has indicated that starter homes will generally comprise 20% of the overall scheme mix.

## 5.4 Rural Exception sites and Entry Level Exception Sites

### *Rural Exception Sites*

The NPPF describes rural exception sites as follows:

***‘In rural areas, planning policies and decisions should be responsive to local circumstances and support housing developments that reflect local needs. Local planning authorities should support opportunities to bring forward rural exception sites that will provide affordable housing to meet identified local needs, and consider whether allowing some market housing on these sites would help to facilitate this’.***

The WODC Local Plan defines rural exception sites as land whereby affordable housing is provided in locations that would not normally be allowed for new housing and recognises that such sites may come forward as speculative ‘windfall’ development.

The Council will continue to identify suitable sites for affordable housing through rural exception sites (RES). This is reflected in Policy H3 – Affordable Housing which states that West Oxfordshire District Council and its partners will work with parish councils, registered providers of affordable housing and local housing, community land and self-build trusts to identify additional suitable rural sites for small scale affordable housing schemes to meet specific local housing needs which cannot be met in any other way.

All new homes on these sites will remain affordable in perpetuity to people in housing need who have a local connection with the parish or appropriate adjoining parishes. Sites will be well-related to the existing built-up areas of towns and villages. Where family homes are proposed priority will be given to locations within a reasonable walking distance of a primary school.

In accordance with the NPPF, Policy H3 recognises that an element of market housing may be appropriate as part of the overall mix within a rural exception site. In such cases, it will be for the developer or landowner to demonstrate not only why the site is suitable for housing, but also why a traditional rural exception site approach (i.e. 100% affordable housing) is not appropriate or achievable. Any market housing will be expected to be a subsidiary element of a predominantly affordable housing scheme.

Any such proposal will be considered against the relevant policies of the Local Plan including in particular Policy OS2: Locating development in the Right Places and Policy H2: Delivery of new homes.

Neighbourhood Plans provides a further opportunity to identify small-scale affordable housing sites again potentially with an element of market housing. The District Council will work proactively with local communities to identify any such opportunities.

## Entry-Level Exception Sites

The NPPF states that

***‘Local planning authorities should support the development of entry-level exception sites, suitable for first time buyers (or those looking to rent their first home), unless the need for such homes is already being met within the authority’s area.***

***These sites should be on land which is not already allocated for housing and should: a) comprise of entry-level homes that offer one or more types of affordable housing as defined in Annex 2 of this Framework; and***

***b) be adjacent to existing settlements, proportionate in size to them, not compromise the protection given to areas or assets of particular importance in this Framework, and comply with any local design policies and standards.***

***Entry-level exception sites should not be larger than one hectare in size or exceed 5% of the size of the existing settlement. In addition they should not be permitted in Areas of Outstanding National Beauty or land designated as Green Belt’.***

The Council will consider any such proposals on their merits.

### 5.5 Self and custom-build

The Government is supportive of custom build housing which it sees as a more affordable route to home ownership and an opportunity to create bespoke, well-designed and sustainably constructed new homes. It also offers the opportunity for small local builders and contractors creating local jobs and contributing to the local economy.

The Local Authority maintains a self-build register where those wishing to express an interest in self and custom build can register. The register allows the District to gauge the level of demand locally and the type of route they are interested in e.g. serviced plot, self-finish, custom build etc. and examine how many meet the locally applied criteria. These criteria include local connection, future occupation as sole residence, financial capability etc.

There is a clear level of interest with 641 entries currently on the self-build register and the council is keen to promote greater diversity in the local housing stock, innovative design and more affordable and sustainable construction.

One of the measures introduced by the Council to meet the demand is requiring a portion of larger housing developments (100 or more dwellings) to set aside 5% of their site for custom / self-build or provide other suitable land available to meet the need. The Council will seek the appropriate portion of affordable housing for the self-build units and this number will form part of the overall affordable housing allocation.

For example; on a site of 1,000 homes where the requirement is for 40% affordable housing (400 homes) then of the self-build element of 5% (50 homes) 40% will be affordable i.e. 20 homes. These will be deducted from the overall affordable requirement reducing it from 400 to 380 homes.



Full details can be found under Policy H5 of the Local Plan 2031<sup>7</sup>

The Council will also encourage the re-use of existing buildings through custom/self-build projects and welcome submissions from groups and individuals for the conversion / re-purposing of existing buildings.

## **6.0 Affordable Housing Standards and Design Requirements**

Design Standards for affordable housing should be no lower than that for market housing and should be tenure blind i.e. not distinguishable by its external appearance. Housing supplied for a Registered Provider should be constructed to the standards approved by the RP and it is critical that the design process recognises at an early stage the need to accommodate a mix of affordable tenures. This mix must meet the needs of, and be attractive to, RP's and applicants are encouraged to undertake early discussions with RP's, considering alternative designs where necessary in order to accommodate on site the affordable housing requirement.

### 6.1 Design criteria

In order to achieve mixed and balanced communities, each development should look to meet the following design criteria:

- there should be no distinction between affordable units and market units, i.e. the development should be 'tenure blind';
- the same level of parking provision should be made for the affordable housing units as for market units, and;
- affordable units should be distributed evenly throughout the development where practicable to promote social inclusion and mixed communities. The exception to this is in relation to the design and provision of housing for older people and developers will need to demonstrate why a deviation is required when seeking approval.

### 6.2 Accessibility and adaptability

The WODC Local Plan has identified the requirement for housing to meet the needs of different groups in the community and some form of specialist housing provision will be required.

The Oxfordshire SHMA (2014) suggests that across Oxfordshire demographic trends are expected to lead to a growth in the number of households with disabilities and will seek to ensure that new homes are able to meet the changing needs of occupants as their needs change to enable them to remain in their homes as they age.

In recognition of this, under the Local Plan, the Council will require larger housing developments of 50 or more units to provide a percentage of new homes as accessible and adaptable housing designed to meet Building Regulations Requirements M4(2)<sup>8</sup>. This is broadly equivalent to Lifetime

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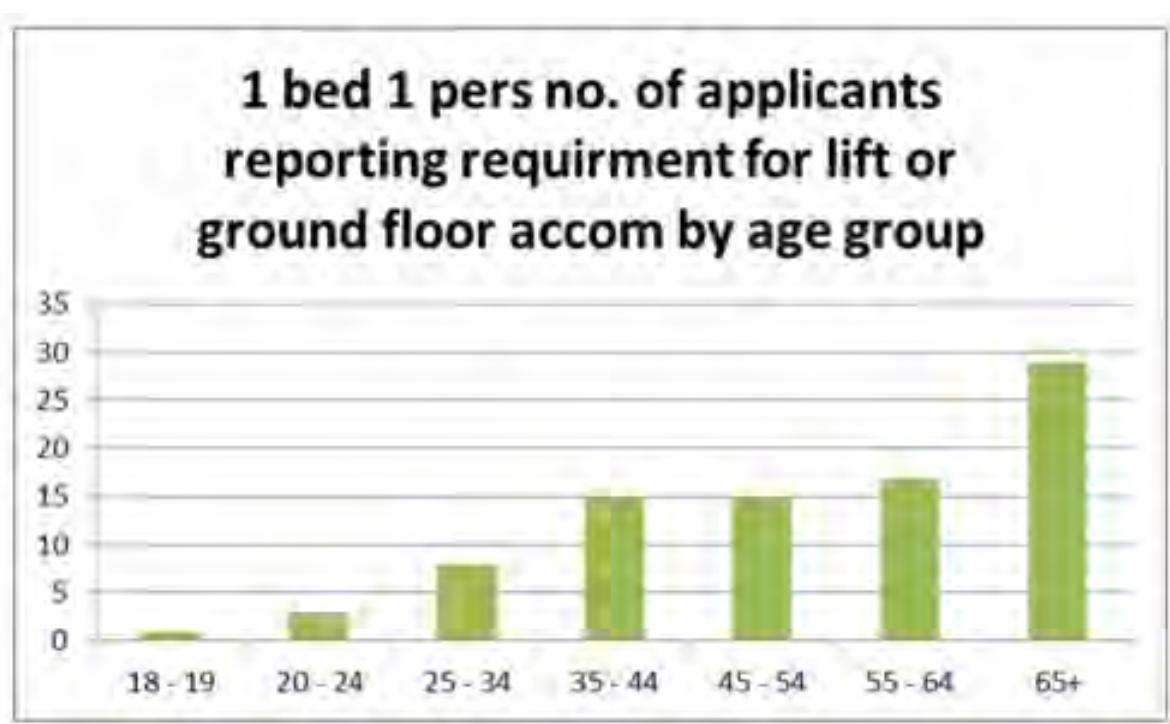
<sup>7</sup> <https://www.westoxon.gov.uk/media/fevjmpen/local-plan.pdf>

Homes Standards and affordable units should be built to provide suitable levels of internal space as set out in the nationally described space standards.

As a minimum the council will seek the provision of at least 25% of market and affordable homes to this standard.

In addition, to cater for the anticipated increase in the number of people with disabilities, due to the ageing population, developers will be expected to provide 5% of homes as wheelchair adaptable dwellings designed to meet Building Regulation Requirement M4(3)<sup>9</sup>.

Data from the WODC Homeseeker+ register shows an increasing demand for either lift access or ground floor properties increasing with age and developers are encouraged to consider this need when designing new developments.



### 6.3 Space standards

In March 2015 the Government set out the nationally prescribed space standards for new housing<sup>10</sup>. The guidelines set out the gross internal floor area for new dwellings at a defined level of occupancy as well as dimensions for key parts of the home, notably bedrooms, storage and floor to ceiling height. Whilst it is not a policy requirement of the Local Plan, WODC supports the use of this guidance and encourages developers to apply these as a minimum when designing new homes.

<sup>8</sup> <https://www.gov.uk/government/publications/access-to-and-use-of-buildings-approved-document-m>

<sup>9</sup> <https://www.gov.uk/government/publications/access-to-and-use-of-buildings-approved-document-m>

<sup>10</sup> [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/524531/160519\\_Nationally\\_Described\\_Space\\_Standard\\_Final\\_Web\\_version.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/524531/160519_Nationally_Described_Space_Standard_Final_Web_version.pdf)

#### 6.4 Zero-carbon homes

WODC has declared a climate and ecological emergency. In the wake of that emergency, as part of a suite of overall measures, the Council now expect developers and applicants to adopt the highest possible standards of energy and sustainable design to ensure new homes being delivered in West Oxfordshire are fit for the future. WODC has adopted a number of policies within the local plan to help protect and enhance our environment and reduce the impact from climate change. Policy CO18 seeks to 'improve the sustainable design and construction of new developments, including improving efficiency and water management'.

WODC will expect all applicants to take full consideration of these policy requirements and demonstrate, within their planning application, how the design of new affordable homes will go above and beyond in terms of delivering exemplary standards of sustainability.

WODC are committed to working in partnership with developers/landowners to support and encourage the wide-scale delivery of affordable housing designed to exemplary standards of fabric-energy efficiency and net-zero carbon in operation. Homes designed to this standard will be able to demonstrate, through an assessment methodology agreed in consultation with the Council, that there are zero-carbon emissions associated with the building in operation and over the course of the year a net-zero operational balance will be met.

For ultra-low energy detached and terraced housing that have a large roof area relative to floor area and a low energy intensity, 100% of their annual energy demand can be met through on-site renewables, typically through the incorporation of roof-mounted solar PV.

For new homes where roof areas are limited and/or the site constrained, investment into near/off-site renewables will be assessed by WODC on a site by site basis.

#### *Sustainable Design and Construction Checklist*

To aid developers and landowners, WODC will be producing a 'Sustainable Design and Construction Checklist' for applicants, setting specific sustainability standards for different building typologies. This will be presented within the context of Government's proposed and enhanced standards being implemented through Building Regulations and Future Homes Standard. Developers/landowners submitting applications that achieve exemplary standards in line with the Sustainable Design and Construction Checklist will be favoured in the determining of planning applications for affordable housing.

A table of the ten key requirements for net-zero carbon, including affordable homes, is shown overleaf. Further advice and guidance can be obtained from WODC's Climate Change Manager and applicants are encouraged to discuss their proposals at the earliest stage.

More information on Passivhaus standards is available from the Passivhaus Trust.<sup>11</sup> In addition, there are already a number of award winning sustainable developments that have been built the most notable being the Goldsmith Street for Norwich City Council, a 100% affordable housing scheme built to Passivhaus standards<sup>12</sup>

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<sup>11</sup> <https://www.passivhaustrust.org.uk/>

<sup>12</sup> <https://ggbec.co.uk/portfolio/ambitious-me-design-for-uks-largest-passivhaus-social-housing-scheme>

## Ten key requirements for new buildings

By 2030 all new buildings must operate at net zero to meet our climate change targets. This means that by 2025 all new buildings will need to be designed to meet these targets. This page sets out the approach to operational carbon that will be necessary to deliver zero carbon buildings. For more information about any of these requirements and how to meet them, please refer to the: UKGBC - Net Zero Carbon Buildings Framework: BBP - Design for Performance initiative; RIBA - 2030 Climate Challenge; GHA - Net Zero Housing Project Map; CIBSE - Climate Action Plan; and, LETI - Climate Emergency Design Guide.

### Low energy use

- 1 Total Energy Use Intensity (EUI) - Energy use measured at the meter should be equal to or less than:
  - **35 kWh/m<sup>2</sup>/yr** (GIA) for residential<sup>1</sup>

For non-domestic buildings a minimum DEC 8 (40) rating should be achieved and/or an EUI equal or less than:

  - **65 kWh/m<sup>2</sup>/yr** (GIA) for schools<sup>1</sup>
  - **70 kWh/m<sup>2</sup>/yr** (NLA) or **55 kWh/m<sup>2</sup>/yr** (GIA) for commercial offices<sup>1,2</sup>

- 2 Building fabric is very important therefore space heating demand should be less than **15 kWh/m<sup>2</sup>/yr** for all building types.

### Measurement and verification

- 3 Annual energy use and renewable energy generation on-site must be reported and independently verified in-use each year for the first 5 years. This can be done on an aggregated and anonymised basis for residential buildings.

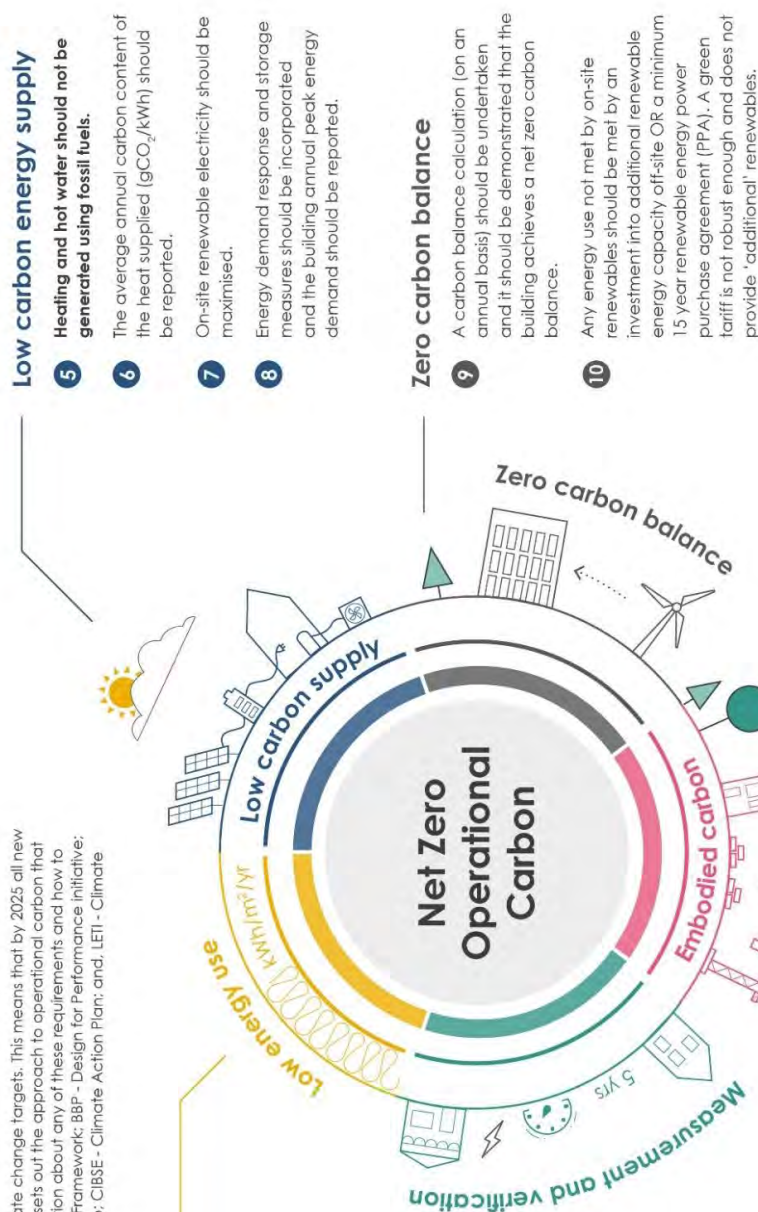
### Reducing construction impacts

- 4 Embodied carbon should be assessed, reduced and verified post-construction.<sup>3</sup>

Developed in collaboration with:



Supported by:



### Low carbon energy supply

- 5 Heating and hot water should not be generated using fossil fuels.
- 6 The average annual carbon content of the heat supplied (gCO<sub>2</sub>/kWh) should be reported.
- 7 On-site renewable electricity should be maximised.
- 8 Energy demand response and storage measures should be incorporated and the building annual peak energy demand should be reported.

### Zero carbon balance

- 9 A carbon balance calculation (on an annual basis) should be undertaken and it should be demonstrated that the building achieves a net zero carbon balance.
- 10 Any energy use not met by on-site renewables should be met by an investment into additional renewable energy capacity off-site OR a minimum 15 year renewable energy power purchase agreement (PPA). A green tariff is not robust enough and does not provide 'additional' renewables.

### Notes:

**Note 1 - Energy use intensity (EUI) targets**  
The above targets include all energy uses in the building (regulated and unregulated) as measured at the meter and exclude on-site generation. They have been derived from predicted energy use modelling for best practice, a review of the best performing buildings in the UK and a consideration of the renewable energy supply for UK buildings. They are likely to be revised as more knowledge is available in these three fields. As heating and hot water is not generated by fossil fuels, the assumes on all electric building until other zero carbon fuels exist, kWh targets are the same as kWh<sub>thermal</sub>. Once other zero carbon heating fuels are available this metric will be adapted.

**Note 2 - Commercial offices**  
With a typical net to gross ratio, 70 kWh/m<sup>2</sup> NLA/yr is equivalent to 55 kWh/m<sup>2</sup> GIA/yr. Building owners and developers are recommended to target a base building rating of 6 stars using the BBP's Design for Performance process based on NABERS.

**Note 3 - Whole life carbon**  
It is recognised that operational emissions represent only one aspect of net zero carbon in new buildings. Reducing whole life carbon is crucial and will be covered in separate guidance.

**Note 4 - Adaptation to climate change**  
Net zero carbon buildings should also be adaptable to climate change. It is essential that the risk of overheating is managed and that cooling is minimised.

## 6.5 Modern Methods of Construction (MMC)

WODC welcomes the use of modern methods of construction including off site construction as a delivery mechanism to increase the speed of delivery of new homes in the district. Such off-site construction must still meet the relevant guidance and the Government is and is seeking an uplift to Part L of the Building Regulations and changes to part F (ventilation) as part of its consultation on the Future Homes Standard<sup>13</sup>.

The aim is to increase the energy efficiency requirements for new homes and requires all new build homes to be future-proofed with low energy heating and world leading levels of energy efficiency. The new standards will be introduced in 2025. WODC are in support of the new standards as a mean to address the climate emergency and reduce energy bills for our residents, especially those in affordable housing.

WODC are interested to discuss with developers schemes delivered through for off-site construction especially where it will enable the increase the speed of delivery of new homes in the district.

## **7.0 Viability**

### 7.1 Approach to viability considerations in West Oxfordshire

The provision of affordable housing will affect the value of land for residential development but will not generally render it uneconomic for residential development. The costs of delivering a workable, high quality development should be anticipated and reflected in the price paid for land and not reduce the ability of a site to provide what is required under the planning obligation.

This is reflected in the Government's practice guidance on viability which states that the total cost of all relevant policy requirements including contributions towards affordable housing should be taken into account when defining benchmark land values<sup>14</sup>.

Policy H3 of the Local Plan has been subject to viability assessment through the preparation of the Local Plan 2031 and is a known requirement of residential development in West Oxfordshire. As such, there will be a presumption that developments will include full and appropriate provision for affordable housing unless it can be robustly demonstrated otherwise.

This is consistent with the Government's practice guidance on viability which states that 'where up-to-date policies have set out the contributions expected from development, planning applications that fully comply with them should be assumed to be viable'<sup>15</sup>.

On this basis, it is up to the applicant to demonstrate whether particular circumstances justify the need for a viability assessment at the application stage. Such circumstances could include, for example where development is proposed on unallocated sites of a wholly different type to those used in viability assessment that informed the plan; where further information on infrastructure or site costs is required; where particular types of development are proposed which may significantly

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<sup>13</sup> <https://www.gov.uk/government/consultations/the-future-homes-standard-changes-to-part-l-and-part-f-of-the-building-regulations-for-new-dwellings>

<sup>14</sup> Viability Planning Practice Guidance - Paragraph: 012 Reference ID: 10-012-20180724

<sup>15</sup> Viability Planning Practice Guidance - Paragraph: 007 Reference ID: 10-007-20190509

vary from standard models of development for sale (for example build to rent or housing for older people); or where a recession or similar significant economic changes have occurred since the plan was brought into force.

In such instances, the onus is on the developer to demonstrate viability providing a full economic appraisal of the cost of development including returns from sale of housing, contribution to local infrastructure and services and required profit margin. The appraisal should be presented on a residual land value basis and include a valuation of the site in its current use, not the purchase price or hope value, and should accompany the planning application or form part of the pre-application discussions.

In accordance with the Government's viability practice guidance, where a viability assessment is submitted to accompany a planning application this should be based upon and refer back to the viability assessment that informed the plan; and the applicant should provide evidence of what has changed since then.

Any viability assessment should reflect the government's recommended approach to [defining key inputs](#) as set out in National Planning Guidance.

Where the Council requires independent advice to validate a viability appraisal, the cost will be borne by the applicant.

Where the Council is satisfied that viability would be jeopardised by full provision of affordable housing it will consider supporting external subsidy to enable full provision. Consideration will also be given to altering the mix including size and tenure in accordance with Policy H3.

As a last resort the number of affordable dwellings sought will be reduced to make the development viable.

## **8.0 Delivery Mechanisms**

### **8.1 S106 agreements**

The Council will generally expect affordable housing to be secured by a S106 agreement. The Heads of Terms of any agreement will need to be established before determination of a planning application the cost of which will be borne by the applicant. An example of a standard S106 agreement can be found in Appendix 3. This is for guidance only as individual heads of terms will need to be agreed for each development.

### **8.2 Timing of provision**

Affordable housing should be provided at the same time as open market housing on a site to ensure that there is no imbalance in the supply of affordable housing in the creation of new communities. Developments that seek to delay provision of affordable housing to the end of the development will not be considered favourably by WODC.

Where infrastructure may be substantial the Council may permit the sale of an agreed percentage of market homes before the sale or transfer of affordable homes with the remainder to be provided in tranches alongside the market housing.



However no development should commence until the affordable housing scheme has been approved and a contract entered into with a Registered Provider and a copy of the contract provided to the Council.

### 8.3 Occupancy:

#### *Nomination and allocation*

All applicants seeking social housing will complete the same process and will be assessed against the same clear set of criteria. Depending on their circumstances, applicants will be placed into one of four bands Emergency, Gold, Silver or Bronze. Local connection will be applied to the majority of vacancies to help each local authority meet their housing demand or where it is a legal requirement.

Once a successful application has been made, applicants are advised of their banding and application date, together with details of how to access the Choice Based Lettings (CBL) system. This enables them to bid for affordable housing vacancies being advertised in West Oxfordshire.

#### *Homeseeeker Plus*

West Oxfordshire District Council is one of seven local authorities that operate Homeseeeker Plus, a CBL scheme run in partnership with the Social Housing Landlords operating within West Oxfordshire. Affordable homes made available for rental tenures in the district are allocated using this scheme.

Homeseeeker Plus enables Social Housing landlords to advertise their homes and applicants are asked to bid for them. The majority of social rented housing vacancies are advertised as per local nomination agreements, however social housing landlords may choose to apply their own published allocation policies.

Once a bid is placed the computer system will place applicants in order of band, and whether they meet the criteria of the advert. Priority for properties goes to those who have a local connection with the local authority in which the property is located, then to those who have a local connection with any of the other Homeseeeker Plus districts and finally to anyone else. Responsibility for letting each available property lies with the Social housing landlord. An application for sheltered and extra care housing for certain schemes may need an assessment of the support needs, prior to an offer being made.

### 8.4 Essential Local Workers (otherwise referred to as Key Workers)

The NPPF defines 'essential local workers' as including 'Public sector employees who provide frontline services in areas including health, education and community safety – such as NHS staff, teachers, police, firefighters and military personnel, social care and childcare workers'.

The NPPF definition of affordable housing includes housing that provides a subsidised route to home ownership and/or is for essential local workers.

WODC recognises that housing affordability is critical to attracting and retaining essential local workers/key workers in the district.



WODC participates in ongoing collaboration with Oxfordshire County Council in identifying and promoting opportunities for key worker accommodation. Oxfordshire County Council has published a document 'Finding A Home In Oxfordshire – A Guide For Key Workers'<sup>16</sup>

Furthermore, WODC recognises that in addition to the health, education, emergency, police and military services traditionally associated with key workers, the definition should be expanded and not limited. Key workers can be employed in commercial, industrial, public bodies, care, farming/agricultural and transport industries as examples. Enabling people to live close to their place of work may also be considered a reason to award Key / Essential Worker status.

The Council seeks to attract investment and as a place for new businesses to grow. As part of the Oxford-Cambridge Innovation Arc future concentration of investment and growth is anticipated. Key workers are vital to the economic success of the district.

WODC are supportive of, and will seek, innovative methods to bring forward proposals to provide key worker accommodation and offer assistance in facilitating liaison with key contacts.

Legal agreements and supplementary documents such as Local Lettings Plans are suggested as platforms for promoting key worker accommodation on agreed schemes. Applicants to the Council's Choice Based Lettings system may be awarded a prioritised classification if they can demonstrate their Key / Essential Worker status. It is expected that those applying for key worker will be expected to meet other qualifying criteria for affordable housing.

#### 8.5 Community-led housing

WODC is supportive of Community Led Housing Initiatives and has a long standing tradition of supporting this type of housing delivery. Stonesfield Community Land Trust in West Oxfordshire is one of the first CLT's in the country and has been supported by WODC to deliver a number of affordable housing schemes within the village since 1983. WODC is currently working with other local groups interested in delivering community led schemes in the district.

These schemes are set up and run by a local, independent, not-for-profit organisation which has often been specifically created for the purpose of building affordable homes for the community.

This can be a collection of individuals, a parish or town council, a developer or a registered provider looking to work in partnership with the community initially by providing a site and offering further support as the development progresses.

The organisation will ensure homes for rent, sale or shared ownership remain affordable for local people. The housing is usually developed by, with and for the community and the community group have the opportunity to develop skills and expertise along the way.

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<sup>16</sup> <https://www.oxfordshire.gov.uk/sites/default/files/file/adult-social-and-health-care/FindAHomeInOxfordshire.pdf>

Community-led housing is highly flexible depending on the type of scheme required such as co-housing; self-help housing; Community Land Trusts and co-operative and resident-controlled housing.

#### *What Issues can Community-led Housing Tackle?*

Community-led housing can involve market sale, discount market sale, shared ownership, market rent, affordable rent, rent to buy or a combination of these. This way it can empower local communities, making them more resilient and able to address issues and groups such as affordability; downsizing; an ageing population; first time buyers and fuel poverty.

#### *What are the guidelines for Community-led Housing?*

Community-led housing proposals should ensure that:

- Meaningful community engagement and consent occurs throughout the development process. The community does not necessarily have to initiate and manage the process, or build the homes themselves
- The local community group or organisation owns, manages or stewards the homes in a manner of their choosing. This may be done through a mutually supported arrangement with a registered provider that owns the freehold or leasehold for the property
- The benefits to the local area and/or specified community must be clearly defined and legally protected in perpetuity

#### *Models of Community-Led Housing*

Community Land Trusts (CLTs) - a form of community-led Housing, set up and run by people to develop and manage homes as well as other assets. They act as long-term stewards of land and housing. In this model they may delegate the development work and/or management of the asset to a project partner such as a housing association or the CLT may become a registered provider itself. For more information visit the National CLT Network<sup>17</sup>.

Co-housing - groups of self-contained dwellings with the benefit of shared additional facilities all managed by a group. The facility may be a large kitchen where group meals are shared or a hall where meetings and classes may be hosted. It can be a communal garden facility. For more information visit UK Cohousing<sup>18</sup>.

Co-operatives - a form of community-led housing where it is built (or renovated) and managed by members of a group with democratic collective control to influence the scheme and its management. The tenure would be shared ownership or affordable rent. For more information visit The Confederation of Co-operative Housing<sup>19</sup>.

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<sup>17</sup> <http://www.communitylandtrusts.org.uk/>

<sup>18</sup> <https://cohousing.org.uk/>

<sup>19</sup> <https://www.cch.coop/>

Community Custom and Self-Build - where an individual or 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. For more information visit the National Custom and Self-build Association<sup>20</sup>.

## **9.0 New routes to delivery**

West Oxfordshire District Council is interested in working in partnership with our neighbouring Oxfordshire Local Authorities and local landowners to accelerate the delivery of affordable housing in the District. Through potential partnership arrangements we will seek to establish a pipeline of suitable sites for development and look to increase the speed with which new homes can be constructed for the residents of West Oxfordshire.

### 9.1 Blenheim approach

WODC has a longstanding partnership with Blenheim Estate and has been working closely with Blenheim on an innovative model for delivering an increased level of affordable housing at between 60 – 80% of market rental costs. This model has been successfully implemented in Long Hanborough and will also be offered on their other sites for development at Woodstock East. It is the intention of Blenheim to retain ownership of the rental properties so they can be held in perpetuity for local people, especially those within the key worker categories. Shared ownership properties are also available under the model and residents can staircase up to 100% ownership with Blenheim having first refusal on purchase if the properties subsequently come to the market.

All allocations for affordable housing properties are handled through WODC's Homeseeker Plus team for affordable rent and Help to Buy South<sup>21</sup> for shared ownership.

### 9.2 Partnerships with legacy landowners

WODC is also interested in partnering with other legacy landowners to accelerate delivery of affordable housing in the district and would welcome discussions with those landowners who are considering development as part of their long term legacy planning. Rural exception sites that would help meet the affordable housing needs of our smaller rural settlements are particularly of interest. Please contact the Strategic Affordable Housing Team for further discussion.

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<sup>20</sup> <https://nacsba.org.uk/>

<sup>21</sup> <https://www.helptobuyagent3.org.uk/>

## **10.0 Oxfordshire Housing and Growth Deal**

In 2017 Oxfordshire's six local authorities together with the Oxfordshire Local Enterprise Partnership began collaboration with the Government (Oxfordshire Housing and Growth Deal).

As part of this collaboration, Oxfordshire received £215 million of new funding to support provision of 100,000 new homes in Oxfordshire by 2031.

Of this total, £150 million focuses on infrastructure to help accelerate delivery of these new homes.

It also includes £60 million for a bespoke programme to deliver at least 1320 additional affordable homes by March 2021 (named the Oxfordshire Affordable Housing Programme). This fund is additional to the existing Homes England Affordable Homes Programme which is ongoing and will continue alongside it.

Whilst use of the Growth Deal funding will not be a material consideration in planning applications, it is intended that it will help facilitate additional affordable housing to that secured through legal agreements.

By releasing its funds early in the development process, it is intended that Growth Deal becomes attractive to developers in the financing of their schemes.

### *Future West Oxfordshire Affordable Housing Programme*

The Oxfordshire Housing and Growth Deal will work to secure further public and private funding to support the ambition of providing 100,000 new homes by 2031.

Post COVID-19 pandemic, an extension to the Growth Deal program to include a 4th year is anticipated. Additionally, through collaboration and use of grant funding, West Oxfordshire District Council seeks to establish a lasting programme that will, via a pipeline of schemes, strategic partnerships and innovative delivery vehicles, provide a material uplift in the level of new affordable housing in Oxfordshire and seek to increase the pace of its delivery.

## **11.0 Monitoring and Review**

The delivery of affordable housing will be monitored in the Council's Annual Monitoring Report, and the contents of this SPD will be updated as appropriate.

## **Glossary**

### **Annual Monitoring Report**

Information on the implementation of planning policies in West Oxfordshire published and submitted to Central Government at the end of each calendar year.

### **Discount Market Housing**

Affordable Housing which is wholly owned by the occupier but is always sold at a discount on full market price.

### **Homeseeker+**

West Oxfordshire District Council's register of residents seeking affordable housing. Residents are required to register with Homeseeker+ to be eligible to apply for affordable housing units that become available within the district.

### **Intermediate Housing**

Affordable Housing which is wholly or partly owned by the occupier but acquired at below full market price. Shared Ownership and Discount Market Sale are types of intermediate housing.

### **Nominations Agreement**

An agreement between the Council and a Registered Provider of affordable housing which allows the council to specify key criteria for the occupiers of the housing.

### **Registered Provider**

The term 'Registered Providers' includes both private registered providers of social housing (mainly housing associations) and local authorities that are registered with the Regulator<sup>22</sup> of Social Housing. Registered Providers **Shared Ownership**

Affordable housing which is part owned by the occupier who also pays rent on the remainder of the property, usually an RP.

### **Supplementary Planning Document (SPD)**

A document that supplements and elaborates policies and proposals in the Local Plan document.

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22

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/801982/Becoming\\_a\\_registered\\_provider.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/801982/Becoming_a_registered_provider.pdf)

## Appendix 1 - Policy H3 Affordable housing

In order to address identified affordable housing needs, the Council will require 'qualifying' market housing schemes to make an appropriate contribution towards the provision of affordable housing within the District.

Within the Cotswolds AONB, housing schemes of 6-10 units and which have a maximum combined gross floorspace of no more than 1,000m<sup>2</sup> will be required to make a financial contribution towards the provision of affordable housing off-site within the District. This commuted sum will be deferred until completion of the development to assist with viability.

Across the District as a whole, housing schemes of 11 or more units or which have a maximum combined gross floorspace of more than 1,000m<sup>2</sup> will be required to provide affordable housing on-site as a proportion of the market homes proposed as follows:

- High value zone (50%)
- Medium value zone (40%)
- Low value zone (35%)

The following levels of affordable housing provision will be applied in relation to sheltered housing and extra-care housing: Sheltered housing

- High value zone (50%)
- Medium value zone (40%)
- Low value zone (35%)

Extra-care housing

- High value zone (45%)
- Medium value zone (35%)
- Low value zone (10%)

In circumstances where it can be demonstrated that the level of affordable housing being sought would make a scheme unviable, a revised mix and type of housing will be considered before a lower level of affordable housing provision is accepted.

Where external funding is available it may be applied to schemes to ensure affordability of rental levels or to increase the number or to change tenure or type of homes to meet priority needs.

Affordable housing mix and tenure will be responsive to identified local needs and site specific opportunities. A financial contribution for the provision of affordable housing on other sites in West Oxfordshire in lieu of on-site provision may be appropriate if it can be demonstrated that:

- It is not physically possible or feasible to provide affordable housing on the application site; or
- There is evidence that a separate site would more satisfactorily meet local housing need and contribute to the creation of mixed communities.

In some instances, a combination of on-site provision and a financial contribution may be appropriate.

West Oxfordshire District Council and its partners will work with parish councils, registered providers of affordable housing and local housing, community land and self-build trusts to identify additional suitable rural sites for small scale affordable housing schemes to meet specific local housing needs which cannot be met in any other way. All new homes on these sites will remain affordable in perpetuity to people in housing need who have a local connection with the parish or appropriate adjoining parishes. Sites will be well-related to the existing built-up areas of towns and villages. Where family homes are proposed priority will be given to locations within a reasonable walking distance of a primary school.

The Council will consider the inclusion of an element of market housing in rural exception sites (RES) provided it is demonstrated to be necessary to delivery (eg. by subsidising the affordable element). In such cases, any market housing would be expected to be a subsidiary element of a predominantly affordable housing scheme.

## Appendix 2 - Useful Contacts

West Oxfordshire District Council

Elmfield, New Yatt Road

Witney, Oxon OX28 1PB

<https://www.westoxon.gov.uk>

**Strategic Housing Manager** – for information on housing need and types of affordable housing

**Planning Policy Manager** – for general planning advice

**Area Planning Manager** – for site specific and pre-application advice.

Planning: 01993 861420

Email: [planning@westoxon.gov.uk](mailto:planning@westoxon.gov.uk)

### Registered Providers

Cottsway Housing Association, Cottsway House, Heynes Place, Avenue Two, Witney, Oxfordshire, OX28 4YG	Tel: 01993 890000 Web: <a href="http://www.cottsway.co.uk">www.cottsway.co.uk</a>
Sovereign, Woodlands, 90 Bartholomew Street, Newbury, RG14 5EE	Tel: 0300 5000 926 Web: <a href="http://www.sovereign.org.uk">www.sovereign.org.uk</a>
Clarion Housing, Level 6, 6 More London Place, Tooley Street, London, SE1 2DA	<a href="tel:03005008000">Tel: 0300 500 8000</a> Web: <a href="http://www.clarionhg.com">www.clarionhg.com</a>
Aster Group, Sarsen Court, Horton Avenue, Cannings Hill, Devizes, Wiltshire, SN10 2AZ	Tel: 0333 400 8222 Web: <a href="http://www.aster.co.uk">www.aster.co.uk</a>
Sanctuary Housing Association, Chamber Court, Castle St, Worcester, WR1 3ZQ	Tel: 0800 131 3348 Web: <a href="http://www.sanctuary-housing.co.uk">www.sanctuary-housing.co.uk</a>
GreenSquare, Methuen Park, Chippenham, Wiltshire, SN14 0GU	Tel: 01249 465465 Web: <a href="http://www.greensquaregroup.com">www.greensquaregroup.com</a>
SOHA, Royal Scot House, 99 Station Rd, Didcot, OX11 7NN	Tel: 01235 515900 Web: <a href="http://www.soha.co.uk">www.soha.co.uk</a>
Sage Housing, Orion House, 5 Upper St Martin's Ln, West End, London, WC2H 9EA	Tel: 020 3369 0431 Web: <a href="http://www.sagehousing.co.uk">www.sagehousing.co.uk</a>
Platform Housing Group, Progress House, Midland Rd, Worcester, WR5 1DU	Tel: 0333 200 7304 Web: <a href="http://www.platformhg.com">www.platformhg.com</a>
Stonewater Housing Association, Montpelier House, Southbank Rd, Kenilworth, CV8 1LA	Tel: 01926 859857 Web: <a href="http://www.stonewater.org">www.stonewater.org</a>
Hanover, The Heal's Building, Suites A&B, 3rd Floor, 22-24 Torrington Place, London, WC1E 7HJ	Tel: 0800 731 2020 Web: <a href="http://www.anchorhanover.org.uk">www.anchorhanover.org.uk</a>
Housing 21, Tricorn House, 51–53 Hagley Road, Birmingham, B16 8TP	Tel: 0370 192 4000 Web: <a href="http://www.housing21.org.uk">www.housing21.org.uk</a>

## **Appendix 3- Example S106 Agreement Affordable Housing Schedule**

### **1. Definitions**

In this Schedule

- 1.1 "Affordable Housing" means dwellings that will be available to households who are otherwise unable to secure private sector housing for purchase or rent locally in prevailing economic circumstances such housing being provided for in conformity with the advice contained in the National Planning Policy Framework published by the Department for Communities and Local Government and who have in the opinion of the District Council a need for such housing and which housing is to be constructed on the Site
- 1.2 "Affordable Housing Dwellings" means at least % of the Dwellings to be built as part of the Development as Affordable Housing and constructed and provided in accordance with the Affordable Housing Scheme
- 1.3 "Affordable Rent" means a rent up to 80% of the local market rent for an equivalent property for the size and location, based on a valuation in accordance with a method recognised by the Royal Institution of Chartered Surveyors and not higher than the relevant local housing allowance maximum amount set for eligibility for housing benefit
- 1.4 "Affordable Rented Units" means (unless otherwise agreed in writing by the District Council) 70% of the Affordable Housing Dwellings let by a Registered Provider and offered at an Affordable Rent (and subsequently varied in line with those rents from time to time) and on terms complying with the HCA's good practice guidance for such rents and associated service charges
- 1.5 "Affordable Housing Scheme" means a scheme including a plan setting out the location size type specification and Tenure of the Affordable Housing Dwellings which shall be approved by the Council pursuant to the terms of this Deed and with such amendments as the Council may approve from time to time
- 1.6 "Applicant" means a person who is on the District Council's Waiting List and is in need of Affordable Housing
- 1.7 "Build Standards" means unless otherwise agreed by the District Council Dwellings



that achieve at least the minimum requirements of Building for Life 12 (which is a government endorsed industry standard for well-designed homes)

- 1.8 “Contract” means a contract to transfer the Affordable Housing Dwellings (together with all necessary rights of way and easements) to the Registered Provider
- 1.9 “District Council’s Waiting List” means the list for allocating Affordable Housing as set out in the Housing Nominations Scheme or any equivalent or similar replacement from time to time in existence
- 1.10 “HCA” means the Homes and Communities Agency created pursuant to the Housing and Regeneration Act 2008 exercising the functions in relation to the funding of affordable housing and includes any successor body exercising similar functions
- 1.11 “HCA Model Lease” means a lease in a form which has been approved and or prescribed by the HCA for shared ownership which allows a lessee to acquire up to and including 100% of the equity of the Shared Ownership Unit and the freehold
- 1.12 “Head of Planning and Strategic Housing” means the officer of the District Council who is responsible for the affordable housing in the District Council’s area or such other officer as may be appointed from time to time
- 1.13 “Housing Nominations Scheme” means the prevailing District Council Housing Nominations Scheme which sets out eligibility for Applicants on the District Council’s Waiting List and the procedure for nominations from the waiting list to Affordable Housing Dwellings within the District Council’s administrative area at the time when allocations are made
- 1.14 “Mortgagee” means any mortgagee or chargee of: -
  - 1.14.1 any Affordable Housing Dwelling and/or;
  - 1.14.2 a Registered Provider or the successors in title to such mortgagee or chargee or any receiver (including an administrative receiver) or manager appointed pursuant to the Law of Property Act 1925
- 1.15 “Nomination” means the nomination by the District Council to the Registered Provider of the Qualifying Person for an Affordable Housing Dwelling
- 1.16 “Practical Completion” means actual completion of the construction of the Affordable Housing Dwellings in accordance with the Contract which save for minor defects permits beneficial use and occupation of the same

- 1.17 “Qualifying Person” means an individual who is on the District Council’s Housing Register
- 1.18 “Registered Provider” means an affordable housing provider as provided for in the Housing and Regeneration Act 2008 and which
- is registered with the HCA (or its replacement body) and which has been approved by the District Council
  - can demonstrate that it has sufficient stock within the West Oxfordshire District and/or can provide evidence of effective community engagement to ensure that high quality management and service standards will be employed, and
  - can demonstrate that it will work jointly with the District Council in meeting the Housing Allocations Policy and agrees to enter into a formal nominations agreement with the District Council upon entering into the Contract
- PROVIDED ALWAYS that if Registered Providers shall have ceased to exist or have been superseded then the expression shall be taken to mean such nearest equivalent body whose objectives include the provision of low cost housing for renting or shared ownership by local people as the District Council may reasonably approve for the purposes of this Agreement
- 1.19 Tenure means Affordable Housing Dwellings which comprise one or more of the following tenures types
- 1.19.1 Affordable Rented Unit; and/or
  - 1.19.2 Shared Ownership Unit
- 1.20 “Shared Ownership Unit” means (unless otherwise agreed in writing by the District Council) 30% of the Affordable Housing Dwellings provided by a Registered Provider where a proportion of the equity is sold on a long lease to the purchaser and the remainder of the equity is initially retained by the Registered Provider subject to rent being charged on the retained equity on terms that are set out in the HCA Model Lease or such other form of lease reasonably requested by the Registered Provider and which shall be first approved by the Council and in accordance with the following:

- 1.20.1 the initial percentage of equity sold is between 40% (or such other lower percentage as may be agreed by the District Council) and 70% which shall be calculated to ensure the Shared Ownership Units are affordable to those in housing need with regard to local incomes and local house prices;
- 1.20.2 rent on unsold equity is initially set at no more than 2.75% or such other percentage as may be agreed by the District Council (acting reasonably); and
- 1.20.3 charges for services are levied in accordance with the good practice guidance issued by the HCA but provided always that this shall provision shall not prevent each such unit being responsible for contributing of a fair and reasonable proportion of any service charge levied for the Development and/or that part of the Development within which such each unit shall be situate
- 1.21 "Size Standard" means compliance with the Government's Nationally Described Space Standard for each and every unit type of Affordable Housing Unit
- 2. The Owner covenants with the District Council as follows:-
  - 2.1 Not to cause or permit the Implementation of Development until a Contract has been entered into with a Registered Provider and the Affordable Housing Scheme has been approved in writing by the District Council
  - 2.2 To provide the Affordable Housing Dwellings on the Site in accordance with the Affordable Housing Scheme as approved by the District Council
  - 2.3 Unless otherwise agreed in writing by the District Council % of the Affordable Housing Dwellings shall be 1 or 2 bedroom Dwellings to accommodate singles, couples, smaller families and older people and  
  
% of the Affordable Housing Dwellings shall be large enough to accommodate households of four or more people and this can include two bedroom houses
  - 2.4 To provide (unless otherwise agreed by the District Council) the Affordable Housing Dwellings so that they meet the Build Standards and the Size Standard

- 2.5 To ensure that all the Affordable Housing Dwellings shall be built “tenure blind” in respect of external design and features so that they are materially indistinguishable from the General Market Housing save to the extent any variation is required to meet the specification requirements of a Registered Provider
- 2.6 Not to Occupy or cause or permit the Occupation of more than
- 2.6.1 30% of the Dwellings which are General Market Housing (or such other number as may be agreed in writing by the District Council) until fifty Affordable Housing Dwellings have been built to Practical Completion and transferred pursuant to the Contract with the Registered Provider
- 2.6.2 60% of the Dwellings which are General Market Housing (or such other number as may be agreed in writing by the District Council) until all the Affordable Housing Dwellings have been built to Practical Completion and transferred pursuant to the Contract with the Registered Provider
- 2.7 Save for the disposal of the Affordable Housing Dwellings pursuant to the Contract from the date of Practical Completion the Affordable Housing Units shall (subject to the remaining provisions of this paragraph 2.7) not be used other than for Affordable Housing to be provided to Qualifying Persons in accordance with the District Council’s Housing Nominations Scheme and shall be retained in perpetuity as Affordable Housing to meet the needs of people locally who are financially unable to rent or purchase a private dwelling on the open market save that:-
- 2.7.1 where an Affordable Housing Dwelling is occupied in accordance with this clause nothing in this Agreement shall prevent the occupation of that Affordable Housing Dwelling by the spouse partner survivor or dependants of that person or such other category of person entitled to occupy or continue to occupy under prevailing housing legislation
- 2.7.2 any tenant or its successors in title who has exercised the right to buy/acquire pursuant to the Housing Act 1996 or any other statutory provision or contractual right to buy for the time being in place in respect of a particular Affordable Housing Dwelling will not be bound by this Agreement

- 2.7.3 any tenant or its successors in title of a Shared Ownership Unit who has acquired 100% of the equity to the Shared Ownership Unit will not be bound by this Agreement
- 2.7.4 any Mortgagee shall not be bound by this Agreement provided that the Mortgagee has first complied with paragraph 2.7.5 of this Schedule
- 2.7.5 a Mortgagee (whether or not the mortgagee is in possession) shall not dispose of one or more of the Affordable Housing Dwellings or commence proceedings for possession of the Affordable Housing Dwelling unless it shall
- a) in the case of proceedings for possession have first given to the District Council no less than seven days prior notice of the commencement of such proceedings and at the time it commences such proceedings shall send copies of any notices or documents served in relation to such proceedings to the District Council's Head of Planning and Strategic Housing
  - b) in the event that the Mortgagee chooses to exercise its power of sale or leasing it shall serve written notice to that effect on the District Council and shall use its reasonable endeavours over a period of three months from the date on which it served notice on the District Council to dispose of the Affordable Housing Dwelling(s) (as the case may be) to a Registered Provider on terms which will retain the Affordable Housing Dwellings as Affordable Housing provided that the Mortgagee shall not be required to dispose of the Affordable Housing Dwelling(s) at less than market value taking into account the terms of this Agreement for a consideration less than the monies owed to the Mortgagee such consideration to include all accrued principal monies interest and costs and expenses
  - c) In the event that the Mortgagee is unable to dispose of the Affordable Housing Dwellings within the said period of three months the Mortgagee shall be entitled to dispose of the Affordable Housing Dwelling(s) at its discretion free from all the obligations or

restrictions in this Deed and following such disposal the disponentee and its successors in title will not be bound by this Agreement

- 2.8 Nominations to all Affordable Rented Units on first and subsequent occupation shall be made by the District Council in accordance with the District Council's Housing Nominations Scheme and a nomination agreement to be entered into between the District Council and the Registered Provider.



WEST OXFORDSHIRE  
DISTRICT COUNCIL

## WEST OXFORDSHIRE DISTRICT COUNCIL

Name and date of Committee	<b>Cabinet: Wednesday 17 June 2020</b>
Report Number	<b>Agenda Item No. 9</b>
Subject	<b>Community Facilities Grants</b>
Wards affected	The Bartons, Charlbury and Finstock, and Eynsham and Cassington
Accountable member	Cllr Michele Mead, Cabinet Member for Health and Leisure Email: <a href="mailto:michele.mead@westoxon.gov.uk">michele.mead@westoxon.gov.uk</a>
Accountable officer	Martin Holland, Business Manager – Contracts Tel: 01993 861556; Email: <a href="mailto:martin.holland@publicagroup.uk">martin.holland@publicagroup.uk</a>
Summary/Purpose	To consider applications for grant aid from the Community Facilities Grants Scheme.
Annex	<a href="#">Annex A</a> – Community Facilities Grant Applications 2020/21 – Round 1
Recommendation	That Community Facilities Grants be awarded in accordance with the recommendations set out in <a href="#">Annex A</a> .
Corporate priorities	Working with communities to meet the current and future needs and aspirations of residents.
Key Decision	Yes
Exempt	No
Consultees/ Consultation	None

## 1. BACKGROUND

- 1.1. This report represents the first of two rounds of funding for the Community Facilities Grant scheme.

## 2. MAIN POINTS

- 2.1. All Members are invited to submit additional information or comments in respect of any of the applications prior to or at the meeting.

## 3. FINANCIAL IMPLICATIONS

- 3.1. The proposed costs arising from this report are detailed in [Annex A](#). If all the grants are approved as recommended the total financial commitment will equal £58,950 and all grants can be met from the existing capital budget. [Annex A](#) also indicates the closing balance for the grant budget if all the proposals are accepted.
- 3.2. Detailed in the following table is the financial commitment if all applications are taken into account and the amounts recommend are approved:

Reference	Applicant	Recommended
CFG/2021/02	The Alice Marshall Hall	£15,000
CFG/2021/04	Charlbury Cricket Club	£17,000
CFG/2021/05	Eynsham Parish Council	£26,950
<b>Total Grant Allocation</b>		<b>£58,950</b>

- 3.3. This grant award results in a total investment of **£58,950** into local schemes, with the leverage effect of the Council's grant being that for every pound grant aided **£3.00** of external or community funding is being released into the District's economy and cultural facilities infrastructure.

## 4. LEGAL IMPLICATIONS

- 4.1. None

## 5. RISK ASSESSMENT

- 5.1. The main risk to the Council is allocating funding to these projects, while the applications to the various other funding partners are unsuccessful. In mitigation the Community Facilities Grant criteria states that the grant will only be paid following successful awards from funding partners.
- 5.2. Risk to the Council will be mitigated by making payment only on satisfactory completion of key stages of the project and upon the provision of relevant invoices and certification by the applicant.
- 5.3. Should Members decide not to grant fund these projects a gap will be left within the project funding which could affect the successful draw down of external grants which ultimately could cause the project to be cancelled.

## 6. CLIMATE CHANGE IMPLICATIONS

- 6.1. The Council will request that in the refurbishment of Alice Marshall Hall in Middle Barton maximise opportunities for energy efficient heating, hot water and lighting systems, consider higher building standards in the works to mitigate Climate Change impacts and reduce ongoing utility bill costs.



## **7. ALTERNATIVE OPTIONS**

- 7.1. The Cabinet could choose to offer differing levels of grant aid than those proposed in ANNEX A, but within the budgets established for these purposes.

## **8. BACKGROUND PAPERS**

- 8.1. None.


**Community Facilities Grant Applications 2020/21 – Round 1**  
**(Annual Grant Allocation £200,000 – unallocated grant balance £200,000)**

Amount Requested	Total Scheme Cost	WODC Contribution	Rate Relief received	Applicant and Grant Use Additional notes and recommendations
£15,000	£60,294.36	£15,000 (7.5% of annual grant allocation)	£240.64	<b>CFG/2021/02 – The Alice Marshall Hall</b>  <b>Total refurbishment of hall, including new kitchen, eco-friendly heating and lighting, new toilets with disabled toilet and baby changing.</b>  The current hall is in a poor condition and in need of modernisation. The heating system has been condemned, which will become an issue in the winter months.  Feedback from a recent village appraisal indicted that residents would welcome an updated/ refurbished hall. At present the hall is used for a playgroup, drama session, yoga and the Scouts. But with a more attractive building they are hoping to increase the usage of the facility.  The project will take account of climate action with all heating/ lighting being eco-friendly and insulation being increased in the building. Their plans demonstrate the desire to accommodate residents in a rural community and provide a facility that is for purpose.  <i>An award will be made subject to achieving the required partnership funding.</i>
<b>Funding Breakdown</b>				
<b>Funding Source</b>	<b>Status</b>	<b>Amount</b>	<b>% of Scheme Cost</b>	
West Oxfordshire District Council		£15,000	24.9%	
Steeple Barton Parish Council	Definite	£3,500	5.8%	
Private Charitable Trust	Definite	£25,000	41.5%	
National Lottery	Estimate	£8,397.18	13.9%	
Clothworkers’ Foundation	Estimate	£8,397.18	13.9%	
<b>TOTAL</b>			100%	

Amount Requested	Total Scheme Cost	WODC Contribution	Rate Relief received	Applicant and Grant Use Additional notes and recommendations
£17,000	£68,127.60	£17,000 (8.5% of annual grant allocation)	80% (£612)	<b>CFG/2021/04 – Charlbury Cricket Club</b>  <b>Replacement of Outdoor Cricket Nets</b>  Replacement of 3 existing dilapidated cricket nets with 4 new cricket nets. This will provide practice facilities to over 200 children and 80 adults.  The current nets have become dangerous to use and are no longer fit for purpose.  The existing nets were well used by large numbers of players from the club and the new nets will also be open for free use by local schools as they no longer provide cricket facilities.  The cricket club is aiming to raise £2000 for the project which will cover the outstanding balance for the project and any variation in cost during installation.  <i>An award will be made subject to achieving the required partnership funding.</i>
Funding Breakdown				
Funding Source	Status	Amount	% of Scheme Cost	
West Oxfordshire District Council		17,000	25%	
Applicant organisation	Estimate	127.60	0.1%	
Charlbury Town Council	Definite	1,000	1.5%	
English Cricket Board	Estimate	25,000	36.7%	
Sport England	Estimate	25,000	36.7%	
TOTAL		£68,127.60	100%	

Amount Requested	Total Scheme Cost	WODC Contribution	Rate Relief received	Applicant and Grant Use Additional notes and recommendations
£26,950	£107,802	£26,950 (13.5% of annual grant allocation)	100% Business rate relief is applied to EPC's Sports Pavilion	<p><b>CFG/2021/05 – Eynsham Parish Council</b></p> <p><b>Refurbishment of Grade II listed Bartholomew Room</b></p> <p>The upper room of the facility is used as the Council's Chamber whilst the lower room has many purposes. It is hired by licence to Eynsham Art Group who use it as an art exhibition space; it's a meeting place for local charity organisations and its also useful as a storage area/dry room when organisations use the Square for community events.</p> <p>Major refurbishment of the facility is due following the findings of a structural and condition survey undertaken in January 2018. The Bartholomew Room's future will be protected by completion of this substantial refurbishment project. The building is showing signs that urgent work is needed to its roof, guttering and chimney stack.</p> <p>The re-arranged lower floor will also provide an accessible toilet.</p> <p><i>An award will be made subject to achieving the required partnership funding.</i></p>
<b>Funding Breakdown</b>				
<b>Funding Source</b>	<b>Status</b>	<b>Amount</b>	<b>% of Scheme Cost</b>	
West Oxfordshire District Council		26,950	25%	
Applicant organisation (a loan is to be applied for from WODC or PWLB/MHCLG in May 2020)	Estimate	80,852	75%	
<b>TOTAL</b>		£107,802	100%	

**Grant balance unallocated: £141,050**

 <b>WEST OXFORDSHIRE DISTRICT COUNCIL</b>	<b>WEST OXFORDSHIRE DISTRICT COUNCIL</b>
Name and date of Committee	<b>Cabinet: Wednesday 17 June 2020</b>
Report Number	<b>Agenda Item No. 10</b>
Subject	<b>Award of Contract for the Supply and Installation of Pulastic Sports Hall Floor at Chipping Norton Leisure Centre</b>
Wards affected	Chipping Norton
Accountable member	Cllr Michele Mead, Cabinet Member for Health and Leisure Email: <a href="mailto:michele.mead@westoxon.gov.uk">michele.mead@westoxon.gov.uk</a>
Accountable officer	Martin Holland, Business Manager – Contracts Tel: 01993 861556; Email: <a href="mailto:martin.holland@publicagroup.uk">martin.holland@publicagroup.uk</a>
Summary/Purpose	Tendering exercise results and to seek approval for the appointment of the Main Contractor.
Annexes	N/A
Recommendations	(a) That approval is granted for the appointment of Sport and Play limited as the Main Contractor; and (b) That the capital programme be amended by the Chief Finance Officer to reflect the use of capital underspend to fund the increased cost, with no overall impact on the programme.
Corporate priorities	Working towards healthier communities Vibrant economy Stronger local communities
Key Decision	Yes
Exempt	No
Consultees/ Consultation	Not applicable.

## **1. BACKGROUND**

- 1.1. Chipping Norton Leisure Centre is located at Chipping Norton School and is owned by the Council. The Centre is a dual use facility and is managed on behalf of the Council by its leisure management contractor, GLL Better.
- 1.2. The Centre opened on 18th July 2002. Since opening the centre has suffered from roof leaks, which have had a detrimental impact on the sports hall floor, this has resulted in the floor boards opening up in areas where water damage was suffered.
- 1.3. In February 2020 Ridge and Partners LLP were commissioned to undertake a site inspection and assessment of the Sports Hall floor. They concluded that; 'despite the construction age of the floor, the overall condition and level of deterioration, primarily as a result of water ingress due to defects with the building envelope, has resulted in the timber floor prematurely reaching the end of its life span and full replacement or refurbishment is required.'
- 1.4. At its meeting on 12th February 2020 Cabinet approved the inclusion of £50,000 within the 2020/21 Capital Programme to replace the sports hall floor.
- 1.5. A non OJEU open tender was undertaken via the Publica Group Electronic Tendering portal.
- 1.6. Only one tender was received by the deadline, from Sport and Play Ltd, in the sum of **£58,290**.
- 1.7. The tender was assessed by a scoring matrix which included design, materials and manufacturing, product range, added value, compliance and warranty. The anticipated practical completion of the project is autumn/ winter 2020, although this is subject to contract award and the restrictions/ impact of COVID -19.

## **2. MAIN POINTS**

- 2.1. A replacement sports hall floor is required to maintain the safe operation of the sports hall for Centre users and school children. The existing floor consists of timber planks which are susceptible to water damage. In mitigation a Pulastic surface has been specified for its durability. Although this surface is not waterproof it does afford a greater degree of protection from water damage than timber.

## **3. FINANCIAL IMPLICATIONS**

- 3.1. The tender amount exceeds the £50,000 budget within the Councils approved 2020/21 capital programme by £8,290; this funding gap can be met from capital underspend from funding no longer required for other leisure capital projects.
- 3.2. If the floor becomes unusable, in accordance with the terms of the leisure management contract, a loss of income claim may be sought by the Councils leisure management contractor.

## **4. LEGAL IMPLICATIONS**

- 4.1. If the floor becomes unusable this could constitute a breach of the dual use agreement with Chipping Norton School.

## **5. RISK ASSESSMENT**

- 5.1. The installation of a new floor will be undertaken by a competent contractor. Planning of the installation works project will allow the risks of an impact to the school and financial damage to the leisure operator through forced closure of the facility to be managed by planning around existing high usage periods.

- 5.2. If the existing timber floor is deemed to be unsafe there will be no option other than to close the sports hall. In this scenario there will be a financial risk to the council from a loss of income claim by the leisure management contractor.
- 5.3. If this floor is not replaced there exists a risk of personal injury claims and reputational damage through prolonged forced closure of the facility.

## **6. ALTERNATIVE OPTIONS**

- 6.1. Members could choose not to accept the report's recommendations and/or suggest alternative solutions.

## **7. BACKGROUND PAPERS**

- 7.1. None



WEST OXFORDSHIRE  
DISTRICT COUNCIL

## WEST OXFORDSHIRE DISTRICT COUNCIL

Name and Date of Committee	<b>Cabinet: Wednesday 17 June 2020</b>
Report Number	<b>Agenda Item No. 11</b>
Subject	<b>Leisure Management Contractor Financial Support</b>
Wards affected	All
Accountable member	Cllr Michele Mead, Cabinet Member for Health and Leisure Email: <a href="mailto:michele.mead@westoxon.gov.uk">michele.mead@westoxon.gov.uk</a>
Accountable officer	Martin Holland, Business Manager – Contracts Tel: 01993 861556; Email: <a href="mailto:martin.holland@publicagroup.uk">martin.holland@publicagroup.uk</a>
Summary/Purpose	To seek approval to waive management fee payments and to provide financial support for the Councils Leisure Management Contractor.
Annex	Exempt Annex A – Monthly summary of costs and management fee payments to the Council.
Recommendations	(a) That a variation to the Leisure Management contract be authorised to (i) Suspend management fee payments from the contractor to the Council at a cost of £276,096; and (ii) Authorise a payment to the contractor totalling £263,581; and  (b) That the Chief Financial Officer be requested to conduct a review of the budget and the Medium Term Financial Strategy at the earliest opportunity and to report to Cabinet and Council.
Corporate priorities	Working towards healthier communities, Stronger local communities
Key Decision	Yes
Exempt	Yes (Annex A)
Consultees/ Consultation	Corporate Leadership Team, Greenwich Leisure Ltd, Cabinet Members.



## **I. BACKGROUND**

- 1.1. On Friday 20<sup>th</sup> March, as part of its Covid 19 response, the Government announced the immediate closure of all gyms and leisure centres. The impact upon usage and financial performance were immediate and unprecedented. GLL has been impacted by a 100% loss of revenue and will continue to face significant financial difficulty in the coming months.
- 1.2. Leisure providers are currently falling between the cracks of most announced support packages. Leisure trusts such as GLL are most at risk because their constitution features a public benefit asset lock and as such do not distribute profits. Currently leisure providers are exempt from most Covid19 emergency support funding. Furthermore, business continuity insurance does not provide cover for losses caused by the new Covid 19 virus.
- 1.3. Following the Government announcement GLL, taking advantage of the job retention scheme, furloughed the large majority of staff. A small number of staff have been retained to ensure the safety and security of the facilities, completing regular visits and maintaining the operational integrity of plant and environmental systems. This approach maintains the facilities in a ready state so they can be recommissioned when restrictions are lifted. Chipping Norton Leisure Centre and Monahan Way Sports Pavilion are being used as food bank distribution centres. The military are utilising the car park at Carterton Leisure Centre as a mobile C19 testing Site, GLL's non furloughed staffs are supporting this re-purposing.
- 1.4. To mitigate fixed costs GLL have also, where possible, isolated plant and systems to reduce the cost of utilities. There are other fixed costs such as licences and fees, repairs and maintenance, insurance etc. which cannot be stopped without impacting on the ability to reopen the facilities.

## **2. MAIN POINTS**

- 2.1. Following the instruction to close the facilities, a request for financial support from the Council was received. Officers have negotiated with GLL representatives on the requirement for reimbursement of costs.
- 2.2. GLL representatives were concerned for the financial sustainability of the company and contract set against the loss of income and future uncertainty. On this basis the financial support requested will require the Council to make on account payments for retained staff, repairs and maintenance, utilities, ICT, insurance, finance charges, irrecoverable VAT and central overhead recovery during the closure period (financial implications refer).
- 2.3. Furthermore GLL has requested that the Council waives the management fee payment due under the Council of £69,024 per month. This loss of income represents a further cost to the Council.
- 2.4. As some costs are estimated an open book approach is proposed to provide a clear and transparent audit trail. Reconciliation will be undertaken to compare actual costs incurred to any on account payments made.
- 2.5. In order to provide re-assurance the Councils S151 Officer asked Swap Audit to conduct a review of GLL's proposals and the process followed by Officers. The review concluded that given the unprecedented nature of this scenario the process adopted was both diligent and robust. The adoption of an open book approach to reconcile forecasted costs with actuals will ensure the Councils financial position is protected.
- 2.6. A further consideration is that whilst the financial assessments in this report are short term, there will undoubtedly be medium/long term financial implications for the Council when the centres re-open. These implications are largely unknown and depends when and what conditions remain (social distancing etc) when the restrictions are lifted. The economic post covid impacts will also be a factor.

- 2.7. When the leisure facilities do re-open costs will increase and accounting for the expected social distancing requirements there will be a lag before pre-covid levels, of income is achieved, especially for memberships and learn to swim. Officers are currently collaborating with GLL to model financial options for the reopening of the facilities and the potential to adopt a phased recovery approach. These options and financial implications for the Council will be brought forward for consideration by members at a future date.
- 2.8. Step 3 of the Government's Covid 19 recovery plan includes the re-opening of leisure facilities, the decision to proceed to step 3 will be made on 4 July 2020. If things proceed as planned there may be a requirement for an urgent decision to facilitate the issue of instructions to GLL for the phased opening of the facilities

### 3. FINANCIAL IMPLICATIONS

- 3.1. As previously referred to GLL have furloughed the majority of their staff using the governments job retention scheme whereby staff receive up to 80% of salary capped at £2,500 per month. GLL are requesting that the Council tops up staff salaries by making up the 20% difference so staff receive 100% of salary. Table (A.) reflects the implications of agreeing to this request; the Exempt Annex A of the report provides a breakdown of the costs for reference.

**Table A.**

March	April	May	June	Total
£50,832	£122,499	£110,025	£124,875	£408,232

- 3.2. The following table (B.) shows the implications of not agreeing to provide additional funds for salary top up:-

**Table B.**

March	April	May	June	Total
£31,569	£83,678	£71,886	£76,448	£263,581

- 3.3. Suspending payments due to the Council in accordance with the financial terms of the contract of £69,024 per month represents a further cost to the Council.
- 3.4. For the period to June 2020, the forecast financial impact amounts to:

	March	April	May	June	Total
Loss of income from contract	£69,024	£69,024	£69,024	£69,024	£276,096
Costs excluding additional funds for top up of salaries	£31,569	£83,678	£71,886	£76,448	£263,581
<b>Overall financial impact excluding top up of salaries</b>	<b>£100,593</b>	<b>£152,702</b>	<b>£140,910</b>	<b>£145,472</b>	<b>£539,677</b>

	<b>March</b>	<b>April</b>	<b>May</b>	<b>June</b>	<b>Total</b>
Financial impact of salary top up	£19,263	£38,821	£38,139	£48,427	£144,650
<b>Overall financial impact including top up of salaries</b>	<b>£119,856</b>	<b>£191,523</b>	<b>£179,049</b>	<b>£193,899</b>	<b>£684,327</b>

- 3.6. The financial impact of March 2019 will be included in the financial outturn report for the 2019/20 financial year and will be funded through the overall year-end contribution to or from the Council's General Fund.
- 3.7. The Council has received grant funding from Government of £1.135 million in recognition of the additional cost pressures and income losses resulting from Covid 19. This compares to the Council's latest forecast financial impact of £2.6 million for 2020/21. Government current funding for Covid 19 in 2020/21 is equivalent to 42% of the Council's forecast financial impact. If further funding is not forthcoming from Government, the Council will need to finance this impact through use of earmarked revenue reserves or use of General Fund Balance.
- 3.8. The Council's forecast includes both the loss of income from the GLL contract and a contribution to GLL costs but excludes the additional cost associated with the salary top up. Should Council agree to the request to fund the salary top-up this, will need to be included in the next iteration of the Council's forecast of the financial impact of Covid 19 and will put further strain on the Council's General Fund.
- 3.9. The overall financial impact of Covid 19 will be considered through the financial sustainability work stream of the Council's Recovery Action Plan and further reports will be presented to Cabinet for consideration over the course of the financial year.

#### **4. LEGAL IMPLICATIONS**

- 4.1. Under the 'Change in Law' provisions within the contract the council is deemed to be responsible for all the costs of hibernation and supporting the recovery.
- 4.2. A contract variation will be required to reflect any changes to the financial basis of the contract.

#### **5. RISK ASSESSMENT**

- 5.1. The main risks to the Council are financial and reputational, if GLL becomes insolvent breach of contract provisions are activated. This would potentially bring any facilities owned by the council back in-house, and involve significant costs to the council. Bringing facilities back in-house involves a wide range of potential costs which could include:-
- Tupeing staff
  - Interim management arrangements
  - Re-tendering
  - Operational Expenditure (Exempt Annex A refers)
- 5.2. Reputational risk could result if the Council elected not to support its Leisure Services provider. If GLL becomes insolvent, the Council's ability to re-open the facilities when restrictions are lifted will be compromised.

## **6. ALTERNATIVE OPTIONS**

6.1. Members could choose to not provide GLL with financial support.

## **7. BACKGROUND PAPERS**

7.1. None.