



# Rural Exception Site Guidance and Checklist Update



September 2013

## Contents

<b>1. Role and Status</b> .....	<b>1</b>
<b>2. Principles of rural exception sites</b> .....	<b>2</b>
<b>3. Assessing need and eligibility</b> .....	<b>3</b>
Housing need.....	3
Affordability and eligibility.....	4
Allocation of exception site affordable housing .....	4
<b>4. Development management principles</b> .....	<b>6</b>
Where should an exception site be located? .....	6
<b>What size should an exception site be?</b> .....	<b>7</b>
<b>What size and tenures of dwellings should be provided?</b> .....	<b>7</b>
<b>Exception site design</b> .....	<b>7</b>
<b>5. Funding</b> .....	<b>9</b>
Who pays for and builds the homes? .....	9
Exception site funding.....	9
<b>6. Affordability in perpetuity</b> .....	<b>10</b>
<b>7. Rural exception site checklist</b> .....	<b>11</b>
<b>8. Monitoring and Review</b> .....	<b>12</b>
<b>9. Contacts</b> .....	<b>13</b>
<b>Appendix 1</b> .....	<b>14</b>
<b>Rural exception site checklist worked example</b> .....	<b>14</b>
Documents included in your checklist: .....	15
How to use the checklist: .....	15
1. Flow chart – realising your rural exception site: .....	15
2. Planning considerations guidance note: .....	15
3. Planning constraints – plan 1, 2 & 3:.....	15
4 & 5. Site checklists 1 & 2: .....	16
6. Useful contacts .....	16
Planning Considerations Guidance Note .....	18
Plan 1 - Absolute Constraints .....	23
Worked Example - Planning Constraints .....	24
Plan 2 - Other Considerations.....	24
Worked Example – Site Checklist 1 - Planning Considerations .....	25
Worked Example - Site Checklist 2 – Landownership.....	27
Other Useful Contacts.....	29
<b>Appendix 2</b> .....	<b>31</b>
Example of a parish housing needs survey .....	31



PARISH HOUSING NEEDS SURVEY

Parish Housing Needs

Return date:

Extra forms/contact person for this survey - Chris McDermott, Senior Housing Officer (Policy and Enabling), Purbeck District Council, Westport House, Worgret Road, Wareham BH20 4PP. Tel. 01929557386. Email. chrismcdermott@purbeck-dc.gov.uk

Potential offers of land

Local affordable housing can only be provided on land which is made available at a very modest cost, therefore communities are dependent on the willingness of local landowners to consider making such land available. Exception sites planning policy requires this low valuation in order to deliver local priority and perpetuity. The Housing Officer welcomes approaches from land owners willing to make such sites available where these relate to existing settlements and do not constitute scattered development. The eventual choice of site will be decided by the Planning Department taking into consideration the views of the community.

PART ONE - for the whole community

We need to get the views of as many people as possible. Please help by completing this section and returning the form whether or not your own household is in need of affordable housing.

Q1 Is this your main home?

Yes.....  No.....

Q2 Has anyone from your family moved away from the parish in the last 5 years specifically due to the cost of local accommodation?

Yes.....  No.....

If you answered 'Yes' to this question and the family members need to move back to the parish, please pass this form to them, or request another form for them from the Housing Officer at the above address.

Q3 If need is proven would you be in favour of a small development of affordable housing to meet the need of people living in the parish?

Yes.....  No.....

PART TWO - for people in housing need

Please complete and return the rest of this form only if you believe you are in need of LOCAL AFFORDABLE HOUSING.

Complete a separate form for each household in need of housing. For instance, if a whole family will move, together complete one form. Or if mature children are in need of independent accommodation, complete one form for each person needing accommodation.

Extra forms available from the Housing Officer at the address above.

Students in full time education: The survey cannot take into account the future housing need of students in full time education where it would be difficult to determine if they will return to/remain in the locality.

## 1. Role and Status

1. The Rural Exception Site Guidance and Checklist are designed to assist parish councils, parish plan groups, developers, landowners, housing associations and other organisations representing small rural settlements<sup>1</sup> to identify sites that are suitable for the provision of rural exception site affordable housing. This guidance should be read alongside the Council's adopted Affordable Housing Supplementary Planning Document (2013), which supports policy RES (Rural Exception Sites) of the adopted Purbeck Local Plan Part 1 (PLP1). This guidance will be used as a material consideration in the development management process at the pre-application stage and to inform planning decisions.
2. The Council has produced this guidance and checklist in order to provide guidance to parish councils and parish plan groups to aid the identification of suitable rural exception sites to meet identified local housing needs.
3. This is an update to the previous checklist published in February 2010. When the Council produced the 2010 document, it underwent a six-week period of public consultation, during which all parish council and parish plan groups were invited to a workshop to discuss it. The responses the Council received have informed this final guidance.
4. This guidance can be viewed at Purbeck District Council's Offices at Westport House, Worgret Road, Wareham. Copies are also available to view on the Council's website at [www.dorsetforyou.com/406834](http://www.dorsetforyou.com/406834).
5. This update makes several minor alterations to the February 2010 version, for example to contact details. A significant change in this update is that it deletes references to settlements with fewer than 3,000 population as being eligible for rural exception sites. An update in national planning policy has dropped references to the 3,000 population threshold and this means that all of the District's settlements, with the exception of Swanage, Upton and Wareham, are considered small rural settlements and therefore eligible to accommodate rural exception sites.

---

<sup>1</sup> Small rural settlements in Dorset are identified in legislation through Statutory Instrument 1997/621. With the exception of Swanage, Upton and Wareham, all of the District's settlements are identified.

## 2. Principles of rural exception sites

6. The National Planning Policy Framework (NPPF) advises local planning authorities to consider the allocation and release of sites in rural areas through the use of a rural exception site policy. This allows limited provision of small sites to be developed for affordable housing in rural communities with the exception of Swanage, Upton and Wareham. Small numbers of open market homes are allowed on an exception site as a way to increase viability and provide more of an incentive to landowners to bring forward sites. Rural exception sites work because the land coming forward will not obtain planning permission for 100% market housing, but it would provide a significant uplift in value compared with agricultural land.
7. A major advantage of rural exception sites is that people with a local connection (living in the parish, close family living in the parish, employed in the parish or grew up in the parish) and with a housing need are given priority in the affordable housing allocation process. In the first instance, and for any future vacancies, exception site housing must always be offered to households in the parish within which it is located. At times when there is no local need, people in adjacent parishes may become eligible for the housing, and eventually households District wide.
8. The development and occupancy of each rural exception site is controlled through a legal agreement, which the developer signs with the Council prior to the issue of the planning application decision notice. This agreement ensures that the houses developed on the exception site remain affordable into the future, once the first occupiers have moved on.

### 3. Assessing need and eligibility

#### Housing need

9. The affordable housing provided on rural exception sites should only be used to meet a clearly identified local housing need and is subject to strict occupancy clauses. The affordable housing is also required to remain affordable 'in perpetuity'. For a community to be eligible for affordable housing delivered via an exception site, the Council must undertake a parish-wide housing needs survey to identify need. The results of the survey should demonstrate that there are people living in the parish/village who are in housing need and are unable to compete in the general housing market (to rent or buy) due to the low level of their income. In addition, the Council will also have regard to other sources of information relating to housing need, for example its regularly updated housing register, the Housing Needs Survey (2006)<sup>2</sup>, and the Update and Review to the Strategic Housing Market Assessment (2011)<sup>3</sup>.
10. To assess a parish's need, in the first instance the parish council should contact the District Council's Senior Housing Officer to arrange a meeting to discuss the process involved. The parish council and the District Council can work together and commission a local housing needs survey to be undertaken for every house in the parish.
11. The main purposes of a parish housing needs survey are to:
- identify a local housing need that can be supported through planning policy
  - encourage people with a local need to register on the Council's housing register. This will enable them to be eligible for offers of housing provision
  - provide essential 'local need' information on household size and tenure, which will inform scheme design, dwelling size and tenure mix
  - provide an indication of community support for the provision of a rural exception site.
12. A parish housing needs survey will ask a number of questions on:
- the housing needs of the whole community
  - the housing needs of the household
  - local connection
  - reasons for housing need
  - income
  - tenure of housing need
  - specific housing requirements.

---

<sup>2</sup> <http://www.dorsetforyou.com/evidence/purbeck>

<sup>3</sup> <http://www.dorsetforyou.com/evidence/purbeck>



## Affordability and eligibility

13. The Dorset Home Choice Common Allocations Policy<sup>4</sup> details what criteria a household must fulfil in order to join the housing register and become eligible for affordable housing. It says that applicants with a household income more than five times higher than the relevant Local Housing Allowance level prevailing in the relevant Dorset local authority area at the time will normally be considered to be able to meet their housing need, through either renting privately or owner occupation. However, Dorset Home Choice will take into account local affordability issues, given that some areas of Dorset have especially high property values.

## Allocation of exception site affordable housing

14. Occupiers of dwellings provided in accordance with the rural exception site policy must be on the housing register and have a local connection to the development. The local connection will be established through the parish housing needs survey and may include:

- close family living within the parish
- employment within the parish
- grew up in the parish
- currently living in the parish.

15. The Council will use a 'local occupancy clause' to determine suitability for both initial and subsequent occupation of dwellings on rural exception sites. Below is an example of a local occupancy clause.

Example of a local occupancy clause:

The following persons are eligible to occupy a vacant dwelling within the development, in the following order of priority:

1. Persons who:

(a) Throughout the period of at least three years immediately prior to the dwelling becoming vacant; or

(b) For at least three years during the period of five years immediately prior to the dwelling becoming vacant,

have had their principle place of residence within the Parish.

2. Persons who throughout the period of at least three years immediately prior to the dwelling becoming vacant have been employed in permanent full-time work in the said Parish.

<sup>4</sup>[http://www.homechoice.dorsetforyou.com/DorsetHomeChoice/uploads/DorsetCommonPolicyFinalv1.15Mar2012\\_.pdf](http://www.homechoice.dorsetforyou.com/DorsetHomeChoice/uploads/DorsetCommonPolicyFinalv1.15Mar2012_.pdf)

3. Persons who have a close family member (e.g. parent, child, brother or sister) who has had their principal place of residence in the Parish for a period of at least five years prior to the dwelling becoming vacant.

If the vacancy cannot be filled in accordance with the above then the same criteria will be applied to the adjacent parishes.

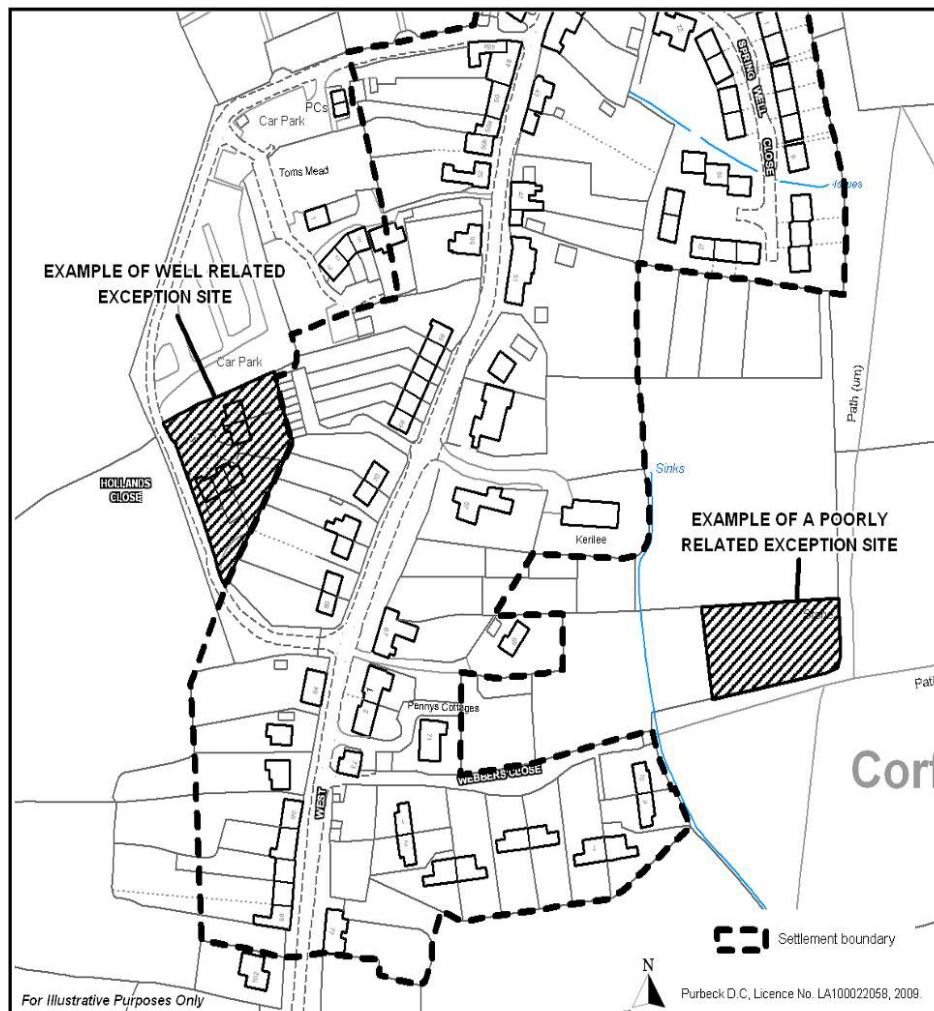
If the vacancy still can not be filled it will then be offered to residents of Purbeck.



## 4. Development management principles

### Where should an exception site be located?

16. The Council recommends that parish councils discuss the suitability of sites with District Council officers at an early stage.
17. Exception sites should form a logical extension to the existing village and should not be viewed as scattered development in the open countryside. Settlements should ideally be supported by local services and a public transport service. The map below provides an example of a site that is well related to a settlement (and has been developed as a rural exception site) and one that is not well related to the settlement and the Council would not consider suitable. It is also important for sites to comply with other considerations, such as land drainage and highways, even if they are well related to the settlement.



18. Sites can be located within a settlement that has a settlement boundary if an owner is willing to accept values substantially less than open market value for housing. This

would only realistically apply if the landowner was a local authority or other public sector landowner.

### What size should an exception site be?

19. Rural exception sites should be small in scale, although the number, size and tenure mix of dwellings will vary according to the level of local need, nature of sites identified and the size of the existing settlement. In some instances, where a larger need is identified, it may be more suitable to identify two or more smaller sites around the settlement boundary in preference to one large site. The Council will assess the suitability of individual site size according to the merits of the scheme.

### What size and tenures of dwellings should be provided?

20. The size and tenure of dwellings to be provided on a rural exception site should be discussed with a District Council Housing Officer following identification of a suitable site. Provision will normally be required to reflect the particular need established in the most recent parish housing need survey. If the housing need survey is out of date then a new survey may be required.

### Exception site design

21. Whilst social housing grant is now becoming increasingly scarce, rural exception sites that receive grant from the Homes and Communities Agency (HCA) will be required to meet 'Design and Quality Standards'. The standards are a combination of HCA standards and other standards such as Commission of Architecture and the Built Environment (CABE), Building for Life and the Code for Sustainable Homes (currently minimum code level 3). They also draw on Housing Quality Indicators, which allow schemes to be evaluated on the basis of quality rather than simply cost.
22. Planning policy requirements are strict in ensuring that all new housing development is sympathetic to its location. Design, layout, materials and landscaping should reflect existing local character, although the Council will consider innovative proposals on their own merits. Innovative design can allow for self-build projects to proceed by reducing build costs<sup>5</sup>. Policy requirements relating to design will apply equally to rural exception site provision as market housing development and should not allow any visual distinction between different tenures of housing. Other policy requirements will also apply, for example in relation to impact on environmental designations, highway safety and flood risk.

---

<sup>5</sup> See the Council's Affordable Housing Supplementary Planning Document for further information on self-build affordable housing at [www.dorsetforyou.com/406834](http://www.dorsetforyou.com/406834)



Rural exception site at Abbots Cottages, Corfe Castle

## 5. Funding

### Who pays for and builds the homes?

23. Registered Providers (RP) are not for profit organisations that specialise in the provision and management of affordable housing. Also known as Housing Associations, RPs use the survey evidence on need, size of household and appropriate tenure provided by the housing enabler to consult with planners and communities, prepare planning applications, and apply for social housing grant from the Homes and Communities Agency.
24. Community Land Trusts (CLT) are a way of providing affordable housing where the asset is owned by the community. A successful example in Purbeck is in Worth Matravers. CLTs are now also able to apply for social housing grant from the Homes and Communities Agency.

### Exception site funding

25. Once a suitable site has been identified and agreed by all parties, including the landowner, the Housing Association, who will be ultimately responsible for building and managing the homes, will then progress the feasibility of the site, including the appointment of architects and developers.
26. Whilst the lower cost of land in exception sites helps to make the homes more affordable, other development costs remain, resulting in the Housing Association needing to apply for funding from the Homes and Communities Agency. This public subsidy covers part of the cost of a scheme with the remainder being covered by a loan taken out by the Housing Association. This is then paid by income generated through the rental or part sale of the homes.

## 6. Affordability in perpetuity

27. The Right to Acquire (RTA) is a scheme which provides tenants of Registered Providers the right to buy the home they currently rent at a discount. This is generally between £9,000 and £16,000 depending on the local authority area in which the property is located. However, the RTA does not apply to small rural settlements and therefore would not apply to rural exception sites.
28. The Preserved Right to Buy is available to tenants who were secure tenants of a local authority at the date their home transferred (if after 1 April 1997) to a Registered Provider. The Preserved Right to Buy continues to apply if the tenant moves to another property owned by the same landlord but not if the landlord changes again.
29. In both instances tenants would need to contact their landlord in order to confirm their eligibility.
30. In both cases there is minimal risk that the houses developed through the rural exception would ever become available on the open market.
31. The provision of rural exception site affordable housing will be secured through a Section 106 legal agreement signed by all relevant parties (Purbeck District Council, the registered provider and developer (if necessary)).
32. The legal agreement will set out key details relating to the provision, including:
- who is party to the agreement
  - the extent of the land concerned
  - planning application reference number
  - the number of dwellings
  - the tenure of dwellings
  - local occupancy cascade
  - relevant plans.

## 7. Rural exception site checklist

33. Purbeck District Council has produced a rural exception site checklist, which is designed to assist parish councils and/or parish plan groups representing rural communities (not including Swanage, Upton and Wareham) to identify sites that are suitable for the provision of rural exception site affordable housing.
34. The checklist provides useful background information on rural exception sites, a flow chart explaining the process by which sites can be identified, a list of useful contacts, and other documents that will enable the site identification process to be followed, e.g. constraints maps, aerial photographs, a planning considerations checklist and a landownership checklist. The process illustrated in the flow chart should support local communities to identify potentially suitable rural exception sites. When the checklist is returned to officers at Purbeck District Council, the completed information will enable more detailed analysis and assessment of constraints, and the identification of the most suitable site(s) to progress through the planning process, either in the form of planning applications or allocation through a future local plan.
35. A copy of the checklist is available from the Council. When requesting a copy, please inform the Council of the relevant parish and settlement(s) to enable relevant maps and aerial photographs to be supplied.

## 8. Monitoring and Review

36. The Council will monitor the implementation of the Rural Exception Site Guidance and Checklist following its adoption.
37. Monitoring will allow significant outcomes or deficiencies of the guidance and checklist to be identified and addressed through clarification, amendment, or replacement. It will also enable the Council to ensure that the guidance is being implemented effectively in support of existing and future planning policy.



## 9. Contacts

38. Initial help can be obtained from Council officers:

Senior Housing Officer (Policy & Enabling)  
Public Health and Housing Services  
Purbeck District Council  
01929 557386

Senior Planning Officer  
Planning Policy Team  
Purbeck District Council  
01929 557359

Development Management Team  
Purbeck District Council  
01929 557206

## Appendix 1

### Rural exception site checklist worked example



## Documents included in your checklist:

1. Flow chart – realising your rural exception housing site
2. Planning considerations guidance note
3. Planning constraints - worked example:
  - Plan 1 - absolute constraints
  - Plan 2 - other considerations
  - Plan 3 - aerial photograph
4. Site checklist 1 – worked example - planning considerations
5. Site checklist 2 – worked example - landownership
6. Useful contacts

## How to use the checklist:

### 1. Flow chart – realising your rural exception site:

The flow chart sets out the key stages and actions that you will need to follow to identify and deliver a rural exception site. The Council recommends that the parish council works through each option (in conjunction with the District Council, where required) to identify a suitable site, involve a Registered Provider, progress a proposal through the planning application process and ensure delivery.

### 2. Planning considerations guidance note:

You should refer to the planning considerations guidance note when assessing potential exception sites for suitability. You should use the guidance in conjunction with planning constraint maps and site checklist 1. The guidance note identifies **absolute constraints**, which in most cases are likely to prevent a site being suitable for development. You should identify any absolute constraints before all other planning considerations. The guidance also identifies other planning considerations that may be more likely to overcome, for example affecting the detailed location, site layout or design of a proposed scheme. Through identifying the absolute constraints and other planning considerations, you will enable the most suitable site to be identified.

### 3. Planning constraints – plan 1, 2 & 3:

When you request a copy of the checklist from the District Council, please inform the Council of the relevant parish and settlement(s) being considered. This will enable the Council to supply suitable maps and aerial photographs. Plans will be provided in A3 size and will include the following:

- Plan 1 identifies any absolute constraints affecting the settlement(s) concerned;
- Plan 2 identifies other planning considerations affecting the settlement(s) concerned; and
- Plan 3 provides an aerial photograph of the settlement(s) concerned and the surrounding area.

You should use the plans in conjunction with the planning considerations guidance note and site checklist 1 to identify constraints affecting sites. When assessing sites using the checklist, you should draw and label plans 1 & 2 in red, and return them to the District Council, together with two completed site checklists. Please note that owing to OS licence constraints, the Council cannot provide an aerial photograph for this worked example.

#### **4 & 5. Site checklists 1 & 2:**

You should complete the site checklists on planning considerations and landownership for each site identified on plans 1 & 2 in order to identify absolute constraints and other planning and landownership constraints affecting the site. You should also record any contact / discussion with landowners on checklist 2. Please then return the checklists to the District Council, together with plans 1 & 2 identifying the sites assessed.

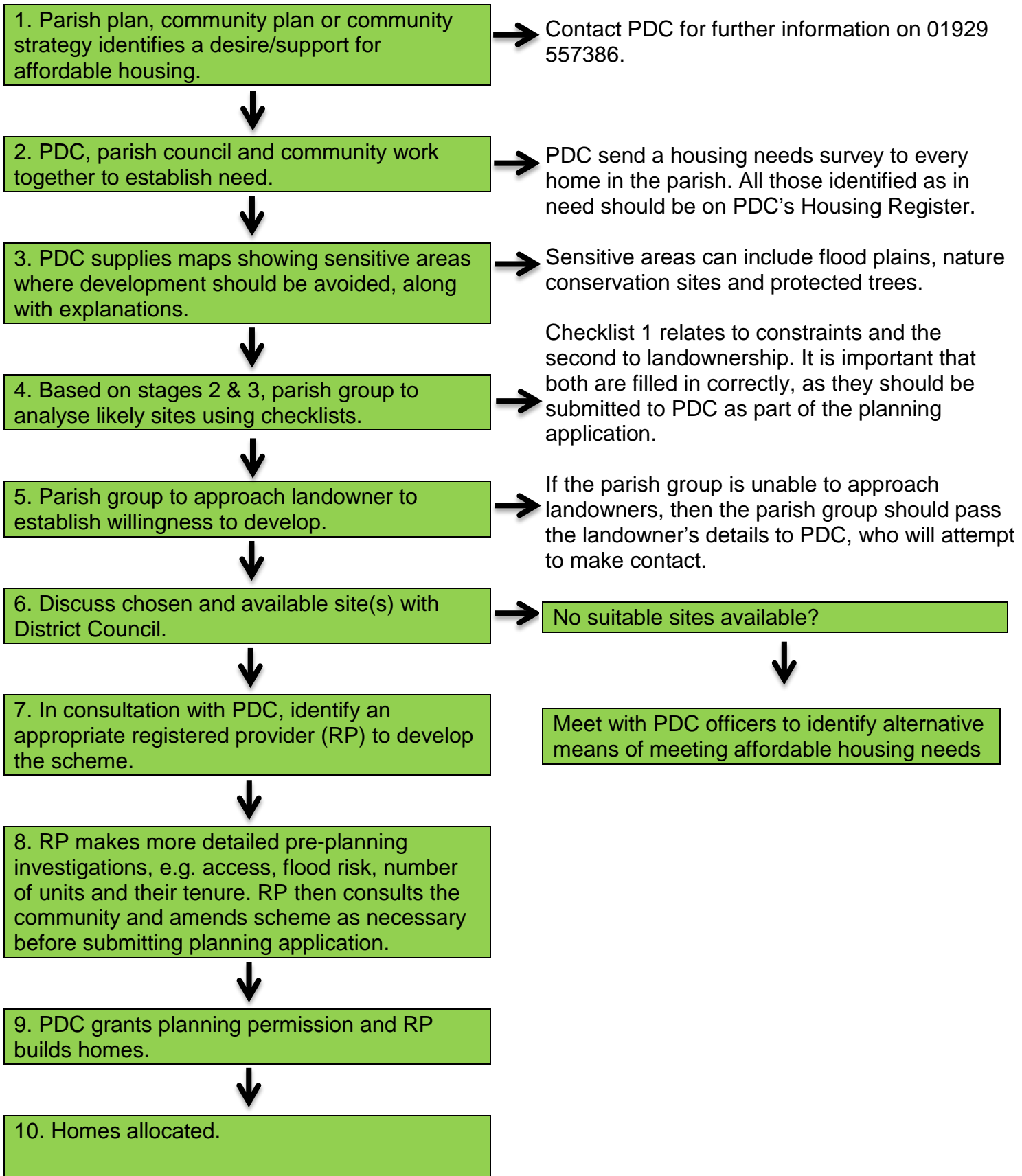
#### **6. Useful contacts**

A list of useful contacts should you wish to discuss any particular sites and their constraints / potential constraints.

## Flow chart: realising your rural exception site

### ACTION

### FURTHER INFORMATION



## Planning Considerations Guidance Note

### Absolute constraints

Planning consideration	Description	Further information contact details
<b>Absolute constraints</b>		
<b>Area of flood risk</b>	Area identified in the Strategic Flood Risk Assessment as being at risk of flooding, and in which inappropriate development should not take place.	<p>Planning Policy Team  Purbeck District Council  Tel. 01929 557359</p> <p>Environment Agency  South West Office  Tel. <b>03708 506506</b></p>
<b>Heathland buffer zone</b>	400m zone surrounding European protected Dorset heathland wildlife sites within which Natural England advises against any intensification of residential development due to the additional pressures and significant adverse impacts on the protected heathland, e.g. from increased wild fires, recreational uses and disturbance by domestic pets.	<p>Planning Policy Team  Purbeck District Council  Tel. 01929 557359</p> <p>Natural England  Dorset Area  Tel. 01929 557450</p>
<b>Internationally important nature conservation site</b>	Special Areas of Conservation, Special Protection Areas, and Ramsar Sites designated for their international importance.	Dorset Wildlife Trust Tel. 01305 264620
<b>National nature conservation sites</b>	National Nature Reserves and Sites of Special Scientific Interest designated for their national importance.	
<b>Scheduled ancient monuments</b>	Sites identified for their national archaeological importance.	<p>Planning Policy Team  Conservation Officer  Purbeck District Council  Tel. 01929 557388</p>

## Other considerations

Planning consideration	Description	Further information contact details
<b>Other considerations</b>		
<b>Area of Outstanding Natural Beauty</b>	Area of countryside designated with the primary aim of conserving and enhancing the natural beauty of the landscape.	Dorset AONB Team Tel. 01305 228239
<b>Conservation area</b>	Area of special architectural and / or historic interest designated for preservation and / or enhancement of character and appearance.	Environmental Design Team Conservation Officer Purbeck District Council Tel. 01929 557388
<b>Flood risk</b>	Development must not be located in areas at risk of flooding.	Environmental Design Team District Engineer Purbeck District Council Tel. 01929 557271
<b>Green belt (South East Dorset)</b>	Area of countryside around the Poole/Bournemouth conurbation designated to prevent urban sprawl by keeping the land open in character.	Development Management Team Purbeck District Council Tel. 01929 557206
<b>Heritage Coast</b>	Stretch of coast designated in recognition of outstanding scenic value and need of special protection while allowing managed public access.	Natural Heritage and Tourism Section Purbeck District Council Tel. 01929 557337
<b>Highway safety considerations</b>	Highway access to new developments should reflect the volume and character of traffic likely to use the access and the road. Good visibility will be required for all proposed access roads to ensure highway safety is maintained. Works required to service the site should be considered e.g. visibility splays for highway safety, works requiring the removal of trees, hedges, banks or walls.	Dorset County Council Transportation & Highways Tel. 01305 224231
<b>Historic parks and</b>	Designated for their value as parks or gardens and for the	Environmental Design Team



<b>gardens</b>	contribution made to the character and distinctiveness of the landscape in which they are located.	Conservation Officer Purbeck District Council Tel. 01929 557388
<b>Listed building</b>	Buildings (and other built features) selected, graded and protected for their architectural and historic interest; association with nationally important people or events; or group value where several buildings comprise an important architectural or historic unity such as a square or terrace.	Environmental Design Team Conservation Officer Purbeck District Council Tel. 01929 557388
<b>Local nature conservation designations</b>	Local Nature Reserves, Sites of Nature Conservation Interest and other nature reserves designated for their local importance.	Natural Heritage and Tourism Section Purbeck District Council Tel. 01929 557337  Dorset Wildlife Trust Tel. 01305 264620
<b>Open space</b>	Areas of open space should be protected for their amenity value e.g. playing fields, allotments, play areas and informal areas of open space	Environmental Design Team Purbeck District Council Tel. 01929 557349
<b>Regionally Important Geological and Geomorphological Sites</b>	Sites identified for their geological and geomorphological interest.	Natural Heritage and Tourism Section Purbeck District Council Tel. 01929 557337
<b>Tree Preservation Order</b>	A tree or group of trees protected for their amenity value, beauty, contribution to the landscape, or scarcity.	Environmental Design Team Tree and Hedgerow Officer Purbeck District Council Tel. 01929 557213

## Blank checklists

### Site Checklist 1 – Planning Considerations

**Site details** (please tick relevant box)

Site	
Site name	
Site address	
Site size	
Number of dwellings proposed	

**Absolute constraints** (please tick relevant box)

	Yes	No	Don't know
Site is well related to a settlement			
Site located in or adjacent to area of flood risk			
Site located in or adjacent to Internationally Important Nature Conservation Site			
Site located in or adjacent to 400m heathland buffer			
Site in or adjacent to National Nature Conservation Site			
Site in or adjacent to Scheduled ancient monument			

**Other considerations** (please tick relevant box)

	Yes	No	Don't know
Site has highway safety considerations			
Site in or adjacent to AONB			
Site in or adjacent to conservation area			
Site in or adjacent to green belt			
Site in or adjacent to Heritage Coast			
Site in or adjacent to historic park or garden			
Site contains or adjacent to listed building			
Site in or adjacent to nature conservation designations			
Site in or adjacent to open space			
Site in or adjacent to Regionally Important Geological and Geomorphological Site			

Site contains or adjacent to TPO			
Other constraints – please identify/describe			

## Checklist 2 – Landownership

**Site details** (please tick relevant box)

<b>Site</b>	
<b>Site name</b>	
<b>Site address</b>	
<b>Site size</b>	
<b>Number of dwellings proposed</b>	

**Landowner details** (please complete where details are known)

<b>Landowner(s) name</b>	
<b>Landowner(s) address</b>	
<b>Has landowner been contacted?</b> Please provide details of date(s) of contact and initial feedback	

**Leaseholder details** (please complete where details are known and landowner has not been identified above)

<b>Leaseholder(s) name</b>	
<b>Leaseholder(s) address</b>	

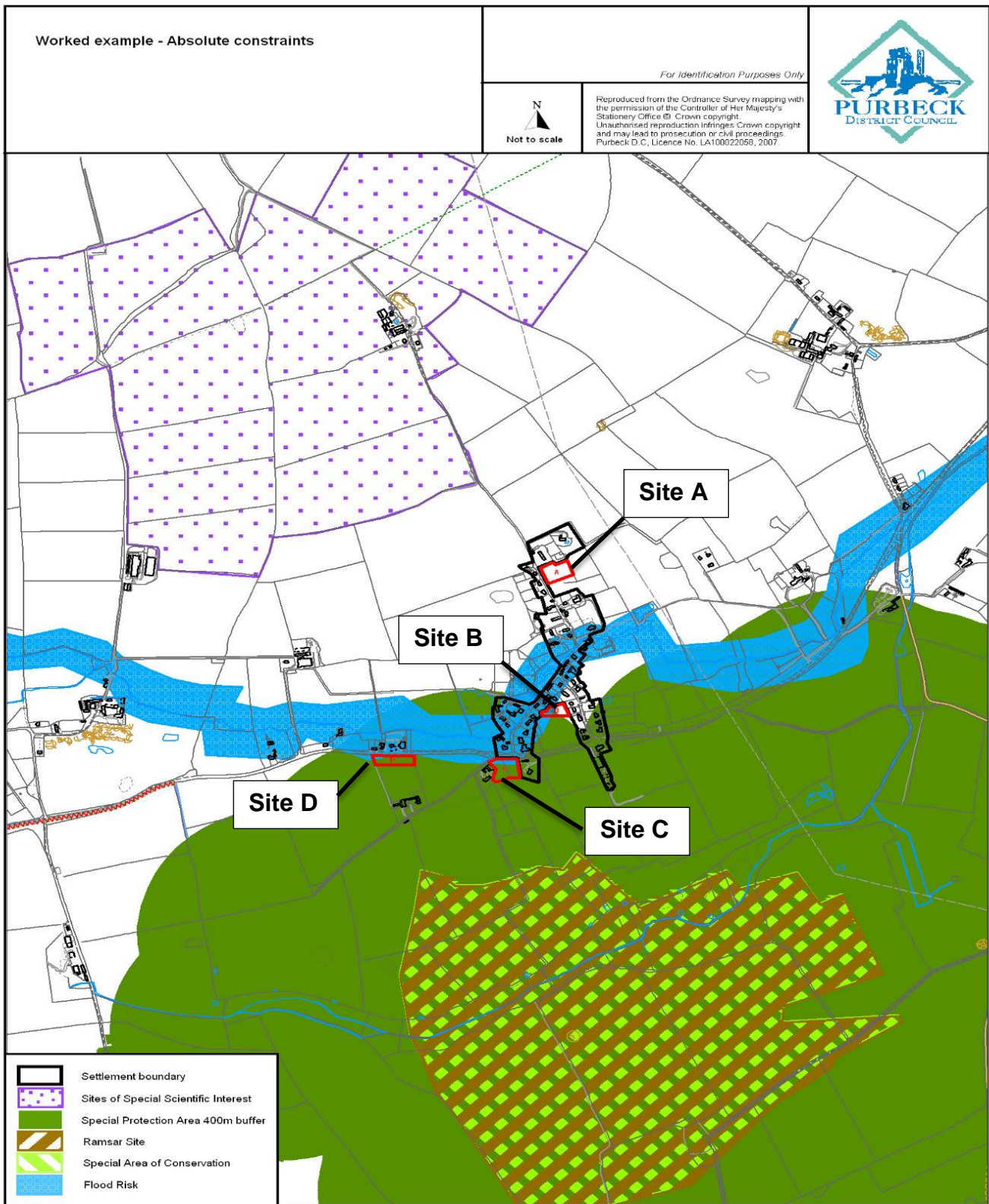
Registered Provider (RP) details (please complete where contact has been made for interest expressed. **Do not complete this part if you wish to develop a self-build affordable home**).

<b>RP organisation (name)</b>	
<b>RP direct contact (name)</b>	
<b>RP contact number</b>	
<b>Please provide details of date(s) of contact with the initial expression of interest from RP together with summary feedback</b>	

NB The actions identified here need to fit with the stages shown on the flow diagram. RPs would not proceed to acquire the site if it was not acceptable in detailed planning terms. Groups should not underestimate the difficulty in securing the cooperation and involvement of a willing landowner

# Worked Example - Planning Constraints

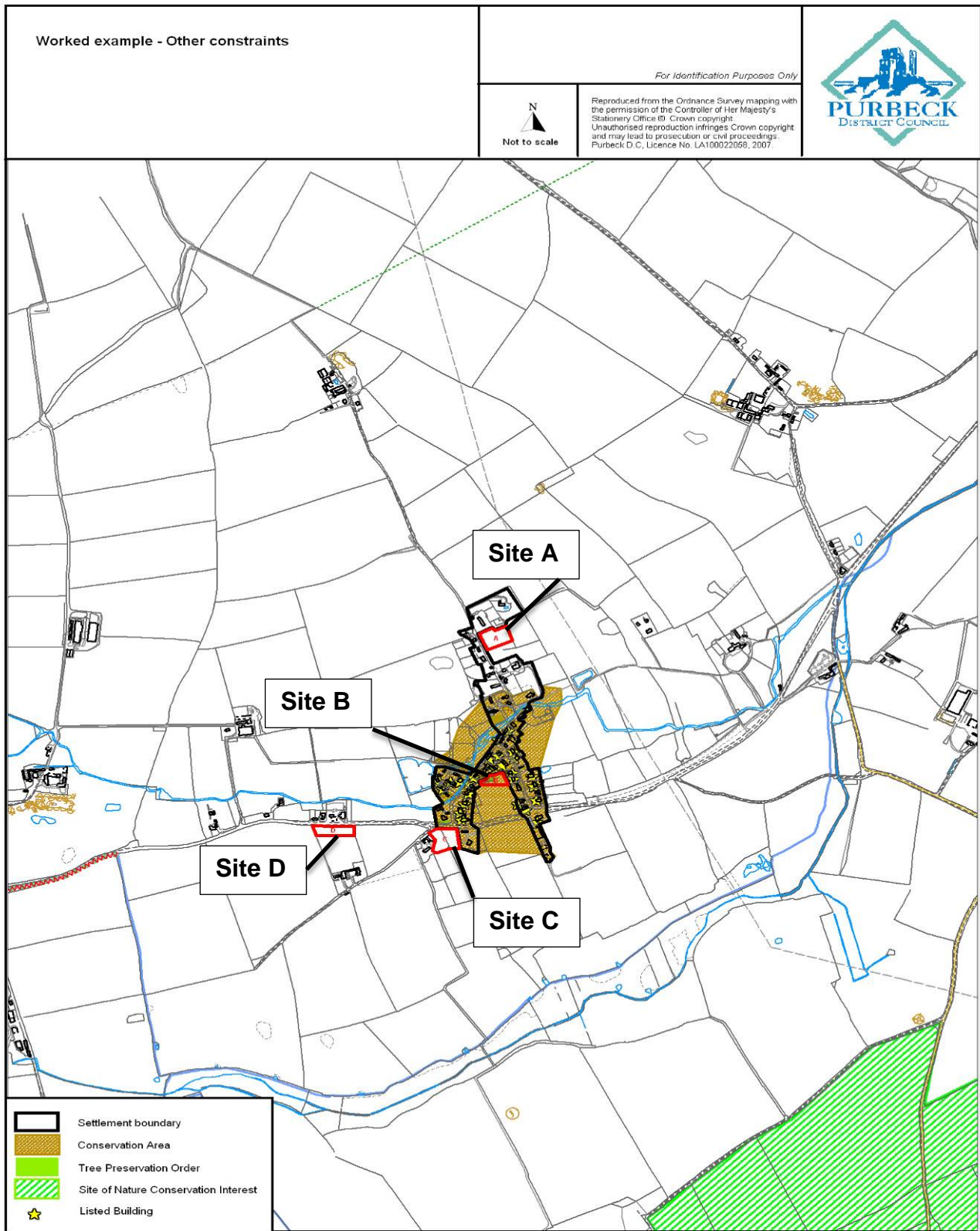
## Plan 1 - Absolute Constraints





# Worked Example - Planning Constraints

## Plan 2 - Other Considerations



## Worked Example – Site Checklist 1 - Planning Considerations

**Site Details** (please tick relevant box)

<b>Site</b>	B
<b>Site name</b>	B Field
<b>Site address</b>	B Lane
<b>Site size</b>	0.2 Ha
<b>Number of dwellings proposed</b>	5

**Absolute constraints** (please tick relevant box)

	Yes	No	Don't know
<b>Site is well related to a settlement</b>	✓		
<b>Site located in or adjacent to area of flood risk</b>	✓		
<b>Site located in or adjacent to Internationally Important Nature Conservation Site</b>		✓	
<b>Site located in or adjacent to 400m heathland buffer</b>	✓		
<b>Site in or adjacent to National Nature Conservation Site</b>		✓	
<b>Site in or adjacent to Scheduled ancient monument</b>		✓	

**Other Considerations** (please tick relevant box)

	Yes	No	Don't know
<b>Site has highway safety considerations</b>		✓	
<b>Site in or adjacent to AONB</b>		✓	
<b>Site in or adjacent to conservation area</b>	✓		
<b>Site in or adjacent to green belt</b>		✓	
<b>Site in or adjacent to Heritage Coast</b>		✓	
<b>Site in or adjacent to historic park and garden</b>		✓	
<b>Site contains or adjacent to listed building</b>			✓
<b>Site in or adjacent to nature conservation designations</b>		✓	
<b>Site in or adjacent to open space</b>		✓	

<b>Site in or adjacent to Regionally Important Geological and Geomorphological Site</b>		✓	
<b>Site contains or adjacent to TPO</b>	✓		
<b>Other constraints – please identify / describe</b>	May be covenant restricting use of site.		



## Worked Example - Site Checklist 2 – Landownership

**Site details** (please tick relevant box)

<b>Site</b>	B
<b>Site name</b>	Field B
<b>Site address</b>	Lane B
<b>Site size</b>	0.2 ha
<b>Number of dwellings proposed</b>	5

**Landowner details** (please complete where details are known)

<b>Landowner(s) name</b>	Miss B
<b>Landowner(s) address</b>	Address line 1 Address line 2 Address line 3 Address line 4 Postcode
<b>Has landowner been contacted?</b> Please provide details of date(s) of contact and initial feedback	Landowner approached parish council on 12/08/13 and willing to consider potential as rural exception site.

**Leaseholder details** (please complete where details are known and landowner has not been identified above)

<b>Leaseholder(s) name:</b>	n/a – landowner identified
<b>Leaseholder (s) address:</b>	n/a – landowner identified

**Registered Provider (RP) details** (please complete where contact has been made or interest expressed)

<b>RP organisation (name)</b>	RP B
<b>RP direct contact (name)</b>	Mr B
<b>RP contact number</b>	Tel ##### #####
<b>Please provide details of date(s) of contact with of initial expressions of interest from RP together with summary of feedback</b>	Contact made by phone on 19/08/13. Meeting to be arranged for September.

NB: The actions identified here need to fit with the stages shown on the flow diagram. RPs would not proceed to acquire the site if it was not acceptable in detailed planning terms. Groups should not underestimate the difficulty in securing the cooperation and involvement of a willing landowner.

## Other Useful Contacts

<p>Crime Prevention and Design Advisor Community Safety Team Dorset Police Madeira Road Bournemouth BH1 1QQ 01202 222546</p>	<p>Building Control Purbeck District Council Westport House Worgret Road Wareham BH20 4PP 01929 557307</p>	<p>Citizens Advice Bureau Mill Lane Wareham Dorset BH20 4RA 01929 551257</p>
<p>Planning Services Purbeck District Council Westport House Worgret Road Wareham BH20 4PP 01929 557359</p>	<p>Dorset Environmental Records Centre Library Headquarters Colliton Park Dorchester ST1 1XJ 01305 225081</p>	<p>Dorset County Council County Hall Colliton Park Dorchester DT1 1XJ 01305 251000 <b>Archaeology</b> – 01305 224222 <b>Transportation &amp; Highways</b> – 01305 224231 <b>Rights of Way</b> - 01305 224463</p>
<p>Dorset Wildlife Trust Brooklands Farm Forston Dorchester Dorset DT2 7AA 01305 264620</p>	<p>English Heritage 29 Queen Square Bristol BS1 4ND 01179 750700</p>	<p>Environment Agency South West Regional Office Manley House Kestrel Way Exeter Devon EX2 7LQ 03708 506506</p>
<p>Environmental Services Purbeck District Council Westport House Worgret Road Wareham BH20 4PP <b>Pollution</b> – 01929 557267 <b>Commercial</b> – 01929 557275 <b>Contaminated Land</b> – 01929 557267 <b>Licensing</b> – 01929 557267</p>	<p>HM Land Registry Melcombe Court 1 Cumberland Drive Weymouth</p>	<p>Natural England Dorset Team Slepe Farm Arne Wareham Dorset BH20 5BN 01929 557450</p>
<p>Southwest Homes Hatfield House Hatfield Road Torquay</p>		<p>Wessex Water Planning Liaison Manager Operations Centre Claverton Down Road</p>

TQ1 3HF 0300 100 0021		Claverton Down Bath BA2 7WW 01225 526303 or 01225 526288
--------------------------	--	--

## Appendix 2

### Example of a parish housing needs survey



### PARISH HOUSING NEEDS SURVEY

Parish Housing Needs

Return date:

Extra forms/contact person for this survey - Chris McDermott, Senior Housing Officer (Policy and Enabling), Purbeck District Council, Westport House, Worgret Road, Wareham BH20 4PP. Tel. 01929557386. Email. [chrismcdermott@purbeck-dc.gov.uk](mailto:chrismcdermott@purbeck-dc.gov.uk)

#### Potential offers of land

Local affordable housing can only be provided on land which is made available at a very modest cost, therefore communities are dependent on the willingness of local landowners to consider making such land available. Exception sites planning policy requires this low valuation in order to deliver local priority and perpetuity. The Housing Officer welcomes approaches from land owners willing to make such sites available where these relate to existing settlements and do not constitute scattered development. The eventual choice of site will be decided by the Planning Department taking into consideration the views of the community.

#### PART ONE - for the whole community

We need to get the views of as many people as possible. Please help by completing this section and returning the form whether or not your own household is in need of affordable housing.

Q1 Is this your main home?

Yes.....  No.....

Q2 Has anyone from your family moved away from the parish in the last 5 years specifically due to the cost of local accommodation?

Yes.....  No.....

If you answered 'Yes' to this question and the family members need to move back to the parish, please pass this form to them, or request another form for them from the Housing Officer at the above address.

Q3 If need is proven would you be in favour of a small development of affordable housing to meet the need of people living in the parish?

Yes.....  No.....

#### PART TWO - for people in housing need

Please complete and return the rest of this form only if you believe you are in need of LOCAL AFFORDABLE HOUSING.

Complete a separate form for each household in need of housing. For instance, if a whole family will move, together complete one form. Or if mature children are in need of independent accommodation, complete one form for each person needing accommodation.

Extra forms available from the Housing Officer at the address above.

**Students in full time education:** The survey cannot take into account the future housing need of students in full time education where it would be difficult to determine if they will return to/remain in the locality.

**ABOUT YOUR HOUSEHOLD**

Please tick which applies to your household:

**Q4a** Everyone in your household needs to move together within the next 5 years.

**Q4b** You are currently part of an existing household, but need to form a new independent household within the next 5 years.

**Q4c** You/your household had to leave the parish due to prohibitive local housing costs and need to return within the next 5 years. (If you know other people to whom this would apply please get them to request forms from the Housing Officer)

**Q4d** Please complete the table below for everyone in the household needing to move

	<i>Age</i>	<i>Gender</i>	<i>Relationship</i>	<i>Occupation</i>	<i>Work Location</i>
You	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other person 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other person 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other person 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other person 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other person 5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**THE HOUSING REGISTER**

**Q5** Is your household on the Local Authority Register? (See notes separate page)  
 Yes.....  No.....

**WHERE YOU LIVE?**

**Q6** Do you live in this parish now?  
 Yes.....  No.....

**WHERE DO YOU NEED TO LIVE?**

**Q7** In this parish?  
 Yes.....  No.....

**Q8** In another parish?  
 Yes.....  No.....

If yes, first choice ...

**Q9 In another town?**

Yes.....

No.....

**If yes, first choice ...**

**YOUR LOCAL CONNECTION**

**Q10 If you need to be housed in this parish, what is your connection to the parish? (Tick one or more)**

*Members of the household grew up in the parish*.....

*Members of the household currently live in the parish*.....

*Members of the household are currently employed in the parish*.....

*Members of the household have close family in the parish*.....

**Q11 Please indicate how many years your household has lived in this parish?**

*under 1 year*.....       *more than 2 years*.....       *more than 10 years*.....

*1-2 years*.....       *more than 5 years*.....

**Q12 Your accommodation at the moment (Tick one box only)**

Are you currently?

*Living with your parents or family*.....

*Renting from a private landlord*.....

*Own your home without a mortgage*.....

*Living in accommodation that is tied to your job*.....

*Own your home with mortgage*.....

*Living in sheltered accommodation*.....

*Sharing ownership of your home with a housing association*.....

*Living in a caravan or mobile home*.....

*Renting from a housing association*.....

*Other (please specify below*.....

**REASONS FOR NEEDING TO MOVE**

**Q13 Please tick your households main reason for needing to move (Tick one box only)**

*Need larger accommodation*.....

*Need to be closer to a carer or dependent, to give or receive support*.....

*Need smaller accommodation - present home is difficult to manage*.....

*Need to avoid harassment*.....

*Need physically adapted accommodation*.....

*Need to have secure tenancy*.....

*Need cheaper accommodation*.....

*Need to change tenure*.....

*Need to be closer to employment*.....

*Need to move into your own accommodation*.....

*Other (please specify below*.....

**Q14 Income:**

Please indicate your approximate total annual income before tax. This should be all forms of income (for example interest on investments) for everyone in the household needing to move together.

Annual Income before tax £



Q15

**Savings or equity:**

Please indicate the amount of any savings, equity in your current home or other property, or investment, which could provide a deposit towards shared ownership

£

Q16

**SHARED OWNERSHIP**

If you have sufficient income, would you be interested in the possibility of a shared ownership home? (See notes page)

Yes.....  No.....

Q17

**SPECIAL NEEDS**

Do you require special adaptations ie. wheelchair access?

Yes.....  No.....

Q18

Could you stay in your present home if the above adaptations were made?

Yes.....  No.....

Q19

**SCHEME DESIGN**

Which of the following scheme design considerations are important to you?

	Yes	No
Work from home provision workshop and/or office .....	<input type="checkbox"/>	<input type="checkbox"/>
Adequate domestic storage space.....	<input type="checkbox"/>	<input type="checkbox"/>
Car free area around houses .....	<input type="checkbox"/>	<input type="checkbox"/>
Safe play zone for children .....	<input type="checkbox"/>	<input type="checkbox"/>
Garden area .....	<input type="checkbox"/>	<input type="checkbox"/>
Car parking .....	<input type="checkbox"/>	<input type="checkbox"/>
Low heating costs .....	<input type="checkbox"/>	<input type="checkbox"/>
Environmentally friendly construction .....	<input type="checkbox"/>	<input type="checkbox"/>

Q20

**LOCAL AMENITIES**

If you need to be housed in this parish will you have adequate access to amenities such as transport, school, shopping etc?

Yes.....  No.....

Q21

**TRANSPORT**

If you are a car user and could be offered an affordable home in the parish, please describe the effect this would have on the number of vehicle journeys you make in and out of the parish?

*I would make fewer car journeys than I currently do.....*

*There would be no change, I would make the same number of vehicle journeys .....*

*I would make more vehicle journeys.....*

If this survey shows that there is a need for affordable housing for local people, the Housing Officer will need to stay in touch with you to ensure you have best chance of receiving an offer of housing if your need is verified. Therefore, it would be advisable to provide your name and contact details below:

Name:

Address:

Telephone No:

If providing contact details - I give my permission for the information I have provided to be used in confidence in discussion of my housing need with relevant Housing Associations.

Signed:

Date:

**Please use this space for any additional comments:**

We are always trying to improve our services to meet the needs of all our residents. We want to know that all residents are getting fair services from us and that, over time, things are improving. To help us do this, please could you answer the following question.

**Do you feel that you have been treated fairly by Purbeck District Council on all equality grounds (including age, gender, ethnic origin, religion or sexual orientation)?**

Yes.....  No.....

**If No please give details and your name and contact details so that we can respond.**

**THANK YOU for taking the time to complete this questionnaire. The results of this survey will be available in the coming months and will help the parish to decide on its future plans.**



## SUPPORTING NOTES

### What is this survey for?

The purpose of this survey is to determine the level of need for better provision of local affordable housing for the parish, for instance through conversion of existing buildings, better use of existing affordable housing or provision of some new affordable homes. The information you provide will be treated confidentially.

### Who may be eligible for Affordable Housing?

According to Local Plan policies, affordable housing should be made available to households unable to meet their own housing needs due to the disparity between household income and the cost of appropriate accommodation to rent or to buy on the open market. The measure of an affordable housing cost recommended in the Council's own District Housing Survey is 25% of gross income. For instance, households who are paying more than this proportion of their income for housing, or who are unable to form an independent household may be eligible for an offer of an affordable home.

### What tenures are included in the term Affordable Housing?

**Affordable Rented Housing** - let by private registered providers of social housing to households who are eligible for social rented housing. Affordable rent is subject to rent controls that require a rent of no more than 80 per cent of the local market rent (including service charges, where applicable).

Affordable rents will apply to newly built homes that are provided by registered providers. In addition some properties will be re-let at these rent levels when they are vacated.

**Social Rented Housing** - Renting from a Housing Association. Rent levels are between 50% and 80% of market rented housing. A typical private rent for a 3 bedroom home in Dorset can cost around £850pm, requiring 51% of gross income, or 68% of net income for households earning £26,000 pa gross. The rate for a similar social rented home is currently in the region of £480 pm.

**Shared Ownership** - Shared ownership allows intermediate earning households (usually those earning something over £26,000 pa) to buy a share of a home from a housing association by taking out a mortgage, and paying rent on the share not owned. This means you have an opportunity to acquire a stake in your home which you can take with you. As an example, a 40% share (£80,000) of the market value (£200,000) of a three bedroom home would cost £467 pm on a mortgage with a 5% interest rate. The rent and service charge to the housing association of £225 pm makes a total housing cost of £692 pm.

### Equity Loans

**Homebuy Direct** - You buy 100% of your home but only have to cover 70% with your mortgage and deposit. The remainder is covered by an equity loan funded jointly by the government and housing developer. There's nothing to pay on the loan for five years, after which there's a small charge which increases each year.

**First Buy** - A new scheme where you buy 100% of your home but only have to pay for 80% initially - and you only need 5% as a deposit. The rest is covered by an equity loan for which there's no charge for the first five years. After this there's a small charge which rises each year.

**Developers' Own Schemes** - Many private housing developers have their own equity loan scheme, and the details vary but in general you pay for between 70% and 85% of the value of your property, and the rest is covered by an equity loan. There's often nothing to pay for this loan, but you're expected to buy the remaining equity within ten years.

### Try Before You Buy

**Rent to Homebuy** - This is available on selected new developments and gives you the opportunity to rent the home you wish to buy at a reduced rate, on the understanding that you'll buy it through shared ownership within a specific time.

South West Homes is the Homebuy Agent for South West England.

South West Homes  
Hatfield House  
Torquay  
Devon  
TQ1 3HF

Telephone: 0300 100 0021

Website: [www.southwesthomes.org.uk](http://www.southwesthomes.org.uk)