This Housing SPD forms part of the Local Development Framework. It should be read alongside the Authority’s Core Strategy and Development Policies DPD. Its aims are to:

- Provide an overview of the current housing issues in the North York Moors National Park
- Provide definitions and explanations of frequently used housing terms
- Provide further details of the housing policies in the Core Strategy and Development Policies document and how they will be implemented
- Provide guidance to potential applicants on how planning applications for housing developments will be assessed and what information is required to support them.

It should be a useful document for any person or organisation wishing to apply for planning permission in the National Park and for parish councils and individual landowners. It replaces the Housing Supplementary Planning Document adopted in June 2008.

This document can be made available in Braille, large print, audio and can be translated. Please contact the Planning Policy team on 01439 770657, email policy@northyorkmoors-npa.gov.uk or call in at The Old Vicarage, Bondgate, Helmsley YO62 5BP if you require copies in another format.
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SECTION 1 INTRODUCTION

1.1 Introduction

Housing is an integral part of the North York Moors National Park with traditional house styles and settlement patterns contributing greatly to the overall character of the Park. Local communities require a range of types of housing to continue to thrive into the future and the promotion of suitable housing falls within the National Park Authority’s socio-economic duties.

This document forms part of the Local Development Framework through which the National Park Authority aims to promote housing that will meet the needs of local communities while conserving the natural beauty and cultural heritage of the Park. The document is a material consideration in the determination of planning applications.
2.1 National policy

The Authority’s approach follows national policy guidance contained in Planning Policy Statements 3 ‘Housing’ and 7 ‘Sustainable Development in Rural Areas’.

PPS 3 outlines the government’s key policy objectives of providing a wide choice of high quality homes and improving affordability. In rural areas it supports the development of housing that will contribute to the creation and maintenance of sustainable communities in market towns and villages. It also encourages local planning authorities to adopt a rural exception site policy to enable small sites at the edge of villages to be developed specifically for affordable housing.

PPS7 identifies sustainable development as a key principle and highlights the importance of new development in rural areas being well designed, in keeping with its location and sensitive to the character of the countryside.

2.2 Regional policy

Regional policy guidance is contained in Policies H1, H4, H6, RR1 and C1 of the Yorkshire and Humber Plan Regional Spatial Strategy to 2026. The Regional Spatial Strategy does not include target figures for new houses to be provided in any of the region’s National Parks but encourages new development that will meet the needs of local communities. It will be replaced in due course by the Integrated Regional Strategy.

2.3 Local Development Framework

This Housing SPD supplements the Authority’s Core Strategy and Development Policies Development Plan Document which was adopted in November 2008 and has replaced the former North York Moors Local Plan (2003). The Core Strategy is the central element of the Local Development Framework for the National Park. It retains some housing policies from the Local Plan as well as introducing new ones. Core Policies J, ‘Housing’ and K, ‘Affordable Housing on Exception Sites’ are the key housing policies for the National Park.

2.4 North York Moors National Park Management Plan

The North York Moors National Park Management Plan provides the overarching strategy for the Park. It sets out a vision for the future and includes policies for fostering the economic and social well being of local communities. Its housing objectives are to resist new development aimed at satisfying external demand and to provide for a range of types and sizes of housing to meet local needs.
SECTION 3 HOUSING IN THE NORTH YORK MOORS NATIONAL PARK

3.1 Background

The North York Moors is a beautiful place with a long history of settlement. The quality of the landscape, the attractiveness of the built environment and the peace and tranquility of the National Park draw many people who want to live in the area. The Park lies within commuting distance of Teesside, York and Leeds and is also attractive to those wanting to retire or buy holiday homes.

Opportunities for new housing development are limited. Most settlements are in remote valleys which cross the moorland or are crowded into locations at the foot of steep cliffs along the coast. The Park is a protected landscape and one of the National Park Authority’s purposes is to conserve and enhance its natural beauty. The conservation of open countryside and significant open spaces within villages is therefore crucially important. There are only a handful of larger villages at the edges of the Park where there are more opportunities for new housing.

High external demand and limited opportunities for new development mean that house prices in the Park have risen dramatically over the last ten years. Despite poor economic conditions, the average house price reported in the Authority’s Annual House Price Survey 2009 was £250,185. Affordability is therefore a major concern for local people and is compounded by the fact that income levels are lower than the national average. The problem is acute for residents with low incomes who may face local prices for a terraced house more than 10 times higher than their annual household income. The comparable figure for England and Wales would be 7.7 times annual household income.

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1 North York Moors National Park Annual House Price Survey 2009 – Table 2

2 Annual Hours and Earnings Survey 2008, Office for National Statistics. The mean gross weekly pay for full time employee jobs in Great Britain was £578.20, whereas the average figure for the North York Moors’ four constituent authorities was £519.10.
The lack of affordable housing has an adverse impact on local communities and their services. If young families are driven out of rural villages because of high prices, local services and facilities may face closure. Increased numbers of commuters may lead to villages becoming dormitory communities with little demand for local shops or pubs and more limited support networks for children and elderly residents.

The National Park Authority addresses these issues in a number of ways in the current Local Development Framework, by restricting the development of open market housing to Helmsley and the larger villages near the edge of the Park and requiring 50% of the dwellings provided to be affordable, by applying local occupancy conditions to new housing developments in the smaller villages across the Park and by allowing affordable housing on ‘Exception sites’.

3.2 The National Park settlement hierarchy

The Local Development Framework for the National Park identifies a settlement hierarchy as follows:

- Local service centre – Helmsley
- Service villages – larger villages near the edges of the Park
- Local service villages – smaller villages which have a range of local services
- Other villages – villages with more limited services, often in remote locations
- Open countryside
The Authority supports different types of housing development in different locations. The first step in considering any housing proposal is therefore to check its place in the settlement hierarchy which is reproduced in Appendix A.

### 3.3 Housing development in the National Park

There are three main types of housing development that will be allowed in appropriate locations in the National Park:

**Open market housing** is developed for sale or rent on the open market, without any restrictions regarding occupation or price. Most existing housing in the Park is open market housing and the National Park Authority will support further suitable developments in larger settlements on the periphery of the Park (Helmsley and the Service Villages). In all but the smallest open market housing developments there will be a requirement to provide affordable dwellings as part of the scheme. Further details are provided in Section 5.

**Affordable housing** is developed specifically for households whose needs cannot be met by the open market. It must be available at a low enough cost for local people to afford currently and in the future. It may be provided as part of an open market development or on an exception site. Further details are in Sections 5 and 7.

**Local needs housing** is housing which has a local occupancy condition attached to ensure that it meets the needs of local people in the National Park. Occupancy is restricted to those who meet certain criteria. Further details are given in Section 6.

Other types of housing development are occasionally needed in the National Park. Where an existing unsatisfactory dwelling in open countryside cannot be brought up to a satisfactory standard, it may need to be replaced. Proposals are dealt with under Development Policy 21 of the Core Strategy and Development Policies DPD and applicants should provide full details of the circumstances. The replacement dwelling must be of a similar size to the original and will be for local occupancy only. Replacement dwellings within settlements will be considered under Core Policy J of the Core Strategy and Development Policies DPD, ‘Housing’ and will also be for local occupancy only unless they are located in Helmsley or one of the Service Villages.

A new dwelling in open countryside may occasionally be needed to support an existing, financially viable agricultural or forestry enterprise. Applications should meet the requirements of Planning Policy Statement 7, Annex A and will be subject to rigorous independent agricultural assessment. They will be supported only where a dwelling in that location is essential and there is a functional need for a worker to be readily available at most times. A condition limiting occupation to those employed in the business will be applied and will be monitored from time to time to ensure that the requirements of the policy are still being met.
SECTION 3 HOUSING IN THE NORTH YORK MOORS NATIONAL PARK

There is a small demand for 'live-work' units in the National Park and applications will be assessed under Core Policy J, ‘Housing’ and Core Policy H, ‘Rural Economy’ of the Core Strategy and Development Policies DPD. Development Policy 8, ‘Conversion of Traditional Unlisted Rural Buildings’ and Development Policy 10, ‘New Employment and Training Development’ may also be relevant depending on the circumstances of the application.

Proposals for live-work units should be of an appropriate scale and activity level for the location concerned and should not cause any unacceptable loss of amenity for neighbouring properties. Proposals must be capable of supporting a genuine employment use and a local occupancy condition will be attached unless the live-work unit is located in the main built up area of Helmsley or one of the Service Villages. The Authority will not support applications for new build live-work units outside settlements.

3.4 Partnership working

The Authority is committed to working in partnership with local authorities, parish councils, housing associations, private developers and all those who have a part to play in providing good quality housing to meet the needs of local communities in the area.

The Park’s constituent local authorities are:

- Hambleton District Council
- Redcar and Cleveland Borough Council
- Ryedale District Council
- Scarborough Borough Council
- North Yorkshire County Council

The district and borough councils have responsibility for housing in their areas and the Authority aims to work with them, particularly regarding the provision of affordable housing. All the local authorities carry out regular housing needs assessments and recent surveys have found a high level of housing need in the National Park.

The Authority will liaise with local authority housing staff regarding the best way to meet the identified needs, looking at the extent and type of housing required in particular villages, the balance between different tenures and the selection of housing associations for affordable housing schemes.

In particular, the National Park Authority has close links with the Rural Housing Enablers for Scarborough, Ryedale and Hambleton. They play a key role in working with Parish Councils, landowners and housing associations, assisting with local housing needs surveys and helping to identify potential sites for affordable housing.
SECTION 3 HOUSING IN THE NORTH YORK MOORS NATIONAL PARK

Contact details for the local authorities and other housing organisations are given in Appendix B.

3.5 Design and renewable energy

New housing developments should enhance the existing built environment in villages across the Park. The Authority wishes to promote the development of good quality buildings with a low energy requirement which will ensure the long term sustainability of the National Park and its communities.

Proposed densities should be appropriate for the location and good design, including careful detailing and sensitive choice of building materials, is essential. All development in the National Park must comply with Development Policy 3 of the Core Strategy and Development Policies DPD, ‘Design’ and applicants should consider its requirements in drawing up specific proposals. Further guidance is available in the Authority’s Design Guide which is available on the Authority’s website at www.moors.uk.net.

More general design guidance is available from the Commission for Architecture and the Built Environment at www.cabe.org.uk and national design standards are set out by Building for Life at www.buildingforlife.org.

The Authority supports the principles of Secured by Design (www.securedbydesign.com) but recommendations must be considered in the context of crime levels in the local community and the fact that the National Park is a protected landscape. There can be particular problems where high timber fences and gates are suggested which have an ‘urban’ feel and are not appropriate for small rural settlements. The Authority will not support proposals which detract from the beauty and character of villages across the Park.

Applicants with proposals for five or more houses must meet the renewable energy requirements in Core Policy D of the Core Strategy and Development Policies DPD, ‘Climate Change’. Further guidance is available in the Renewable Energy Supplementary Planning Document.
SECTION 4  AFFORDABLE HOUSING – KEY DEFINITIONS

4.1 Affordable housing need

The National Park Authority considers that a household is in need of affordable housing if they are living in inadequate or unsuitable housing and cannot afford to rent or buy on the open housing market.

4.2 Affordable housing

The Authority’s definition of affordable housing as set out in the Core Strategy and Development Policies DPD is based on Planning Policy Statement 3:

‘Affordable housing is non-market housing provided to those whose needs are not met by the market. It can include social rented and intermediate housing (such as shared ownership). It should be available at low enough cost to afford based on local incomes and house prices and must include provision for the home to remain at an affordable price for future eligible households.’

The National Park Authority will consider proposals for a variety of types of affordable housing but all schemes must meet the requirement of providing well designed, good quality housing that is affordable for local people in perpetuity.

4.3 Affordability

The Authority is concerned with affordability for individual households and will be looking for affordable housing schemes where monthly rent and/or mortgage costs are less than 30% of gross monthly household income. The link to local incomes is a key factor in the Authority’s assessment of affordability.

Where a local housing needs survey has been carried out in connection with an exception site proposal, the results will normally show what local people can afford. On other schemes or if such information is not available, the Authority will use figures published by the Office for National Statistics which give the lower quartile average earnings for the Park’s constituent local authority areas. These figures are the best available to show the income levels of households likely to need affordable housing.

If proposals are for discounted sale schemes, the Authority will take into account government guidance that a household can afford to buy a home if the price is 3.5 times the gross annual income for a single earner or 2.9 times the gross annual income for households with two earners.
SECTION 4 AFFORDABLE HOUSING – KEY DEFINITIONS

If proposals are for any form of low cost home ownership, the Authority will also look at the level of deposit that will be needed to secure a mortgage as this can sometimes take the property out of reach of people who need affordable housing.

4.4 Affordable housing providers

Most affordable housing is developed by housing associations set up to provide and manage homes for people in housing need. Housing associations are non-profit making organisations and most are registered with the Tenant Services Authority. They are legally known as Registered Social Landlords (RSLs).

The National Park Authority expects most affordable housing schemes to be provided by RSLs. The Authority will consider proposals put forward by unregistered housing associations and private companies but will require robust evidence that they can develop and manage good quality housing that is affordable in relation to local incomes and will remain so in perpetuity.

4.5 Social rented housing

Social rented housing may be owned and managed either by local authorities or RSLs. In recent years most new social rented housing has been developed by RSLs, usually with an element of grant funding from the Homes and Communities Agency (formerly the Housing Corporation). RSL rents are determined with reference to a national rent regime and rent increases are controlled.

4.6 Intermediate affordable housing

This is housing at prices and rents above those of social rent but below market levels. The dwellings must still be available at low enough cost for eligible households to afford and there must be provision for them to remain affordable for future eligible households.

The two most common forms of intermediate affordable housing are shared ownership and discounted sale. They are often generally referred to as ‘low cost home ownership’:

- **New Build HomeBuy (formerly called Shared Ownership)**
  This is a type of shared equity scheme where a purchaser can buy an initial share in a home, normally between 25% and 75%, and pay rent on the remainder. The purchaser may buy additional shares - known as ‘staircasing’ - but under current legislation this would be up to a maximum of 80% in the National Park so that the property could not be sold outright onto the open market. The Authority would also require a ‘buy back’ provision in favour of the original housing provider.
SECTION 4 AFFORDABLE HOUSING – KEY DEFINITIONS

- **Discounted sale**
  This is where a property is offered for sale with a discount on its market price. The level of discount is applied to future sales and must be sufficient to ensure that the property is affordable to local eligible households.

Further details of low cost home ownership schemes can be found on [www.direct.gov.uk/en/HomeandCommunity](http://www.direct.gov.uk/en/HomeandCommunity).

The development of intermediate affordable housing usually involves an element of grant funding or another form of subsidy, for example, a Section 106 contribution or land offered at a low price.

### 4.7 Affordability in perpetuity

A key requirement for all affordable housing schemes is that they must remain affordable for future local residents. RSLs providing social rented housing achieve this through their rent regime. Other applicants should include information to demonstrate that there are robust arrangements in place which will restrict the future price or rent of dwellings to ensure that they are affordable for future residents.

Affordability ‘in perpetuity’ is particularly important for shared ownership schemes which can quickly become unaffordable if owners staircase up and are selling a much higher portion of the equity than they started with. Applications for shared ownership or discounted sale schemes must show how the dwellings will be kept affordable into the future and the Authority will need to approve the proposed legal documents including any leases prior to granting planning permission.
SECTION 5 OPEN MARKET HOUSING AND THE REQUIREMENT FOR AFFORDABLE DWELLINGS

5.1 Location of new open market housing development

Under the Authority’s Core Strategy and Development Policies, open market housing developments will be permitted in the main built up areas of Helmsley and the Service Villages of Ampleforth, Easington, Scalby, Sleights (including Iburndale), Thornton-le-Dale, West and East Ayton and the part of Guisborough that falls within the Park boundary. Open market housing will not be supported in smaller villages where the Authority’s policy is to use the limited opportunities for development to provide for local needs.

5.2 Requirement for affordable housing

The Authority’s requirement for affordable housing as part of open market housing developments is set out in Core Policy J of the Core Strategy and Development Policies DPD. 50% of the dwellings produced must be affordable:

- On sites larger than 0.1 hectares or
- Where two or more residential units are proposed.

Prior to its adoption in November 2008, the Authority’s Core Strategy and Development Policies DPD was subject to independent examination by the Planning Inspectorate. Although the document was found to be sound, the 50% affordable housing requirement in Core Policy J was given interim status for a period of three years. This was to allow time for a Viability Assessment of the policy to be carried out.

District Valuer Services carried out an independent assessment of the policy in 2009. A summary report is at Appendix C and a full copy of the Viability Assessment is available on the Authority’s website.
SECTION 5  OPEN MARKET HOUSING AND THE REQUIREMENT FOR AFFORDABLE DWELLINGS

The Assessment showed that there were problems with scheme viability with a 50% affordable housing requirement applied across the whole of the National Park. However, since the Assessment was based on costs and values at the end of 2008 in the middle of a major economic downturn, the Authority has decided to review the position again in Autumn 2010.

In the meantime, the Authority will treat each case on its merits and recommends early pre-application discussion of any proposals where the 50% affordable housing requirement in Core Policy J will apply.

When considering a particular proposal, the site area to be measured is the gross developable area including gardens, access drives and any areas of open space associated with the development. The policy applies to the conversion of existing properties, including listed buildings, as well as new build housing developments. Where a building to be converted is currently in use as a residential dwelling, the 50% affordable housing requirement applies to the extra dwellings created by the conversion. Care and retirement homes will fall within the policy if the accommodation to be provided is self-contained.

5.3 Type of affordable housing to be provided

The Authority will consult the local housing authority and the Rural Housing Enabler regarding the size and type of affordable housing need that has been identified for the area. This information will come from the District’s Housing Needs Assessment or from a local needs survey if one is available. The Authority will consider a range of types of affordable housing, including dwellings for social rent, shared ownership or discount for sale. Whatever form of affordable housing is chosen, the proposed units should clearly meet the need that has been identified in terms of tenure, size of dwellings and affordability.

The affordable housing should be provided to a high quality and should meet the standards set by the Homes and Communities Agency. It should be an integral part of the proposed development and should be similar to the open market housing in scale and appearance. Applicants should show clearly on a site layout plan which units will be affordable.

For new build schemes, the proposed site density should be appropriate for the specific location, bearing in mind the form of the surrounding built up area and existing open spaces within the settlement. Proposals which appear to avoid or reduce the requirement to provide affordable housing by including fewer dwellings than appropriate will not be supported.
SECTION 5  OPEN MARKET HOUSING AND THE REQUIREMENT FOR AFFORDABLE DWELLINGS

Where applications are for an ‘odd’ number of dwellings, the required affordable housing provision will be 50% of the total number less one (for example, for a 7 unit scheme it will be 50% x (7-1) = 3), with a financial contribution in lieu of the outstanding ‘half’ dwelling. The financial contribution will generally be half of the difference between the open market value and the agreed ‘transfer’ price for the affordable units (see below).

In the majority of cases, the affordable housing will be provided as part of the proposed development and this is the Authority’s preferred approach. Occasionally there may be circumstances where this is not practicable and the Authority will consider accepting the same number of affordable dwellings on another site. The housing must still clearly meet the identified needs of local people. Only in exceptional circumstances will a commuted sum be accepted in lieu of the required affordable housing. The Authority will normally aim to use any commuted sums to help deliver or improve another affordable housing scheme, preferably in the same part of the National Park.

5.4 Working in partnership with a Registered Social Landlord

In most cases the completed affordable units will be transferred to a local Registered Social Landlord and the Authority will liaise with the relevant local housing authority and the applicant at an early stage regarding a suitable partner RSL.

Agreement must be reached with the RSL regarding the specification of the affordable dwellings and the transfer price of the completed units. The Authority will expect the applicant to agree a figure that is consistent with existing practice in the local housing authority where the scheme is located. The affordable dwellings should be completed and handed over to the RSL in a timely manner along with the rest of the development. The RSL will be responsible for allocation of the affordable dwellings and it is expected that wherever possible they will be used to meet the needs of people in the community where the housing is located.

5.5 Financial viability

If the requirement to provide 50% affordable housing leads to difficulties with the financial viability of the proposed development, applicants may ask for an independent financial viability assessment. This will be carried out by the Valuation Office Agency and applicants will need to provide development details including scheme drawings, a brief specification, cost information and anticipated values at completion. A list of the information required for a financial viability assessment is at Appendix D.

The cost of financial viability assessments will be met by the applicant and further details of the Valuation Office Agency service are available on the Authority’s website. The conclusions of the financial viability assessment will be relevant for a specified time period which will be determined by prevailing market conditions. If an approved development has
SECTION 5  OPEN MARKET HOUSING AND THE REQUIREMENT FOR AFFORDABLE DWELLINGS

not been completed within the specified period, an updated financial viability assessment may be required.

If the assessment shows that there are genuine difficulties with financial viability, the Authority will discuss with the applicant the best way forward. This may include the RSL applying for Social Housing Grant (SHG) from the Homes and Communities Agency to enable the affordable housing to be provided. The Authority will consider a reduction of the affordable housing target only after all other avenues have been explored.

In discussions with developers regarding the affordable housing provision required under Core Policy J, the Authority will have regard to the guidance in the North Yorkshire Affordable Housing Negotiation Protocol, a copy of which is on the Authority’s website.

5.6 Procedures for submitting applications

An Affordable Housing Proposal form should be included with all applications for open market housing developments where there is a requirement for affordable housing to be provided. The form is available on the Authority’s website and a copy is attached at Appendix E. Full details of the proposed affordable housing should be included together with information on the stage that negotiations with the RSL partner have reached. The Authority will expect ‘in principle’ agreement to have been reached on the transfer price and the Heads of Terms of the S106 Agreement before a planning application is validated.

The agreements reached regarding the affordable housing provision will be secured by means of a S106 Agreement. A list of standard Heads of Terms to be included in a typical agreement is at Appendix F.
SECTION 6 LOCAL NEEDS HOUSING

6.1 Background

Most of the housing available in the National Park is open market housing, available to anyone who chooses to and can afford to live there. Because of the natural beauty of the Park and its proximity to urban areas, there is considerable external demand for properties from commuters and others wishing to buy homes in the area.

Since 1992 the National Park Authority has sought to ensure that limited opportunities for new housing are used to meet the needs of local people by applying local occupancy conditions to certain new houses. The Core Strategy continues this approach in Core Policies B and J. Although open market housing developments will be supported in the larger settlements at the edge of the Park (Helmsley and the Service Villages), all new housing development in other villages should be for people with a strong local connection and will be subject to a local occupancy condition.

Anecdotal evidence suggests that the market value of properties with a local occupancy condition is typically reduced by about 15% to 20%. Although they do not fit the definition of ‘affordable housing’, they fall between open market and affordable dwellings and therefore contribute to a balanced mix of types of housing available in the National Park.

6.2 Local occupancy policy

Core Policy J of the Core Strategy and Development DPD sets out the Authority’s local occupancy policy which is reproduced below.

The occupancy of local needs housing will be restricted to:

A People who are currently living in and have permanently resided in the National Park for 5 years or more and are living in accommodation that no longer meets their requirements  or

B People who do not currently live in the National Park but have a strong and long standing link to the local community including a previous period of residence of 5 years or more  or

C People who have an essential need to move to live close to relatives who are currently living in and have resided in the National Park for at least the previous 5 years or more and require support for reasons of age or infirmity  or
SECTION 6 LOCAL NEEDS HOUSING

D People who require support for reasons of age or infirmity and need to move to live close to relatives who are currently living and have resided in the National Park for at least the previous 5 years or more or

E People who need to live in the National Park as a result of current sole employment within that parish or adjacent parishes within the National Park.

All applicants will need to demonstrate to the satisfaction of the National Park Authority that the needs of the identified proposed occupants are genuine, that the proposal represents the most practical and sustainable solution to meet the need identified and why the existing housing stock cannot meet their needs.

Part A of the local occupancy policy covers people who are currently living in the National Park and have resided there for 5 years or more. Several parishes are split by the Park boundary and in most cases residence in any part of the parish will be acceptable for the purposes of the policy. However, in the following parishes where the main town or village lies outside the Park boundary, residence must be strictly within the Park boundary:

- Allerston
- Burniston
- East Ayton
- East Harlsey
- Ebberston and Yedingham
- Great Ayton
- Great and Little Broughton
- Great Busby
- Guisborough
- Ingelby Arncliffe
- Irton
- Kirkby in Cleveland
- Kirkbymoorside
- Lockwood
- Nawton Beadlam
- Newby
- Pickering
- Potto
- Scalby
- Snainton
- Sutton under Whitestonecliffe
- West Ayton

For Part B of the policy, the Authority will look for a strong, on-going and long standing link to the specific local community where the property is located. A long standing connection to the Park as a whole will not be sufficient. For example, a person who has grown up in a particular community, has close family still living there and who wants to return after a period of study or employment, would meet the policy requirements. However, a family who has spent holidays in the National Park over many years but has no other links to the local community would not qualify.

For Part E of the policy, the Authority will look for confirmation that the employment is permanent rather than temporary and, whether full-time or part-time, constitutes the main element of the household’s income.
SECTION 6 LOCAL NEEDS HOUSING

6.3 Circumstances where a local occupancy condition will apply

A local occupancy condition will be applied:

- Where a new dwelling is developed on an infill site within the main built up area of one of the Park’s Local Service Villages or Other Villages;
- Where one or more new dwellings are created through the conversion or subdivision of an existing building within the main built up area of one of the Park’s Local Service Villages or Other Villages (whether or not the building is listed).
- Where a building is substantially altered so that the original dwelling is not retained, a local occupancy condition will be attached to all new dwellings in the converted building;
- Where an agricultural or forestry occupancy condition is being removed;
- In certain other circumstances, for instance where a replacement dwelling is built or where an unlisted traditional building in open countryside is being converted for local needs letting or for use as a live-work unit;
- In very exceptional cases where an application is approved contrary to the policies set out in the Core Strategy and Development Policies DPD or because of special circumstances.

The local occupancy restriction will be applied as a condition of planning permission and relates to the property. This means that the first and all subsequent occupants must meet the local occupancy criteria. Any person wishing to purchase an owner occupied property which has a local occupancy condition attached will need to obtain written approval from the National Park Authority that they comply with the condition.

The Authority will monitor local occupancy planning conditions on a regular basis and will take action where appropriate. If a person has been occupying a property contrary to the terms of a local occupancy condition, the time spent in the property will not count as part of their period of residence in the National Park in any consideration of their case.

6.4 Information to be provided with applications for Local Needs Housing

Planning applications for Local Needs Housing developments should include a Local Occupancy proforma, a copy of which is at Appendix H and can be downloaded from the Authority’s website. If the proposal is for a conversion which will produce more than one dwelling, a separate form is needed for each unit.

The information provided should include details of any existing accommodation that is available in the area and show why the development is the most practical way of meeting the proposed occupants’ housing needs.
6.5 Former council houses with local occupancy covenants

Many former council houses in the National Park are subject to a local occupancy restrictive covenant. These were attached by the local housing authority when the houses were first sold to tenants under Right to Buy legislation. Responsibility for checking and approving new owners lies with the relevant local authority and prospective purchasers should approach them rather than the National Park Authority.
SECTION 7 AFFORDABLE HOUSING ON EXCEPTION SITES

7.1 General principles

Core Policy K of the Core Strategy and Development Policies DPD allows for the development of affordable housing as an ‘exception’ to normal planning policy in certain circumstances:

Core Policy K – Affordable Housing on Exception Sites

In order to maintain the sustainability of local communities, proposals for the development of 100% affordable housing as an exception to normal policy will be supported where need has been identified, on sites:

1. Adjacent to the main built up area of Helmsley and the Service Villages.

2. On sites which could accommodate more than 1 unit within and adjacent to the main built up area of the Local Service Villages.

3. Within or adjacent to the main built up area of Other Villages on sites which could accommodate more than 1 unit, where it can be demonstrated through a Sustainability Appraisal that the development will contribute to the environmental, social and economic sustainability of the settlement.

The affordable housing provision must be to meet the needs identified through a current housing needs survey. Robust arrangements must be demonstrated to ensure that all units provided as an exception to normal policy remain affordable to the local community in perpetuity.
SECTION 7 AFFORDABLE HOUSING ON EXCEPTION SITES

Proposals for exception sites should stem from a locally identified need for affordable housing. The support of the community is important and the housing should be specifically tailored to meet local needs. However, the Authority does not encourage the development of one bedroom affordable dwellings because of their lack of flexibility. As a general rule schemes should be small in scale, up to six to eight dwellings, and sympathetic to the form and character of the settlement. They should be well related to existing services and facilities.

7.2 Delivering affordable housing on exception sites

The Rural Housing Enabler for the area will normally be involved in the development of an exception site scheme and will carry out a local housing needs survey. The RHE works with the Parish Council, landowners and housing associations to help identify potential sites and the Authority will liaise closely with them in looking at possible options.

Because of the restrictions on its use, the land value for an exception site is less than it would be for an open market housing development and this helps to ensure that the housing is affordable for local people.

Exception sites will normally be developed by a local RSL but proposals from other housing providers will be considered as long as they fulfill all the requirements set out in this document and include robust arrangements for the housing to be affordable to local people in perpetuity. If the proposals are for rented accommodation, applicants must show that they have satisfactory arrangements to provide good quality management of the properties.

7.3 Evidence of local need

There should be clear and up-to-date evidence of the need for affordable housing in the community where the exception site is located. The evidence must address housing need rather than housing choice. It should demonstrate that there are households with links to the local community who are currently in inadequate or unsuitable accommodation and are unable to rent or buy on the open market.

Local Housing Authorities carry out Housing Needs Assessments for their areas on a regular basis and the Rural Housing Enabler will check whether the district wide survey has identified a need for affordable housing in the relevant parish and, if so, for what type of housing.

Information on local housing needs quickly becomes out of date and, if the data available from a district wide survey is getting old or there are concerns over the size of a proposed development in relation to the identified need, a parish level survey may be required. The survey should be carried out by an independent and suitably qualified person or
SECTION 7 AFFORDABLE HOUSING ON EXCEPTION SITES

organisation, normally the Rural Housing Enabler and should cover the whole of the parish where the exception site is located.

The survey report should show the number of households in need of affordable housing and give details of:

- The nature of the housing need, for example, inadequate facilities or overcrowding in the present home, inability to afford current accommodation, the need to set up an independent home or to be closer to employment or a dependent relative;
- The size, type and tenure of accommodation required, including the need for housing for elderly people, wheelchair users, others with special needs and their carers;
- Whether the accommodation is needed immediately or in the future;
- What rent and mortgage payments households in need of accommodation could afford;
- Confirmation of their local connection to the parish.

It may be necessary to update parish level information if more than 18 months has passed since it was collected, especially if the identified need was for only a small number of units.

7.4 Drawing up a scheme

The size of an exception site development and the type and tenure of dwellings provided should be related to the detailed housing needs identified in the local survey. Careful thought needs to be given to design, particularly as sites are likely to be near the edge of the built up area of the village. Any new housing development should be in a form which is appropriate for the edge of the settlement and creates a suitable link with the surrounding countryside.

Affordable housing in Castleton

It is most important that the households identified in the local survey should be able to afford the housing that is proposed. Applicants will also need to demonstrate that there are robust arrangements in place to restrict the future price or rent of properties to ensure affordability for future residents. All relevant information, including draft leases where appropriate, should be included with the planning application.
SECTION 7 AFFORDABLE HOUSING ON EXCEPTION SITES

7.5 Local connection for Affordable Housing on Exception Sites

Affordable housing on exception sites is intended to meet the needs of the local community. Occupants must have a local connection and must satisfy at least one of the following criteria:

- They must have been living in the parish for at least 5 years, either immediately prior to occupation or within the last 10 years or
- They must have current sole employment within the parish, defined as employment which provides the household’s main income, or have had such employment for at least 5 years within the last 10 or
- They must have a close family connection to the parish, defined as having parents, children or siblings who have lived in the parish for at least 5 years immediately prior to occupation.

The local connection requirement applies to the first and all subsequent occupants of exception site dwellings and will be secured through a Section 106 legal agreement. If it is not possible to find a suitable occupant at any point, the agreement includes ‘cascade’ arrangements whereby occupants can be selected from adjoining parishes and then from elsewhere in the National Park.

The Authority expects the developer and any subsequent managing organisation to make appropriate checks to ensure that residents’ local connection is genuine, for example by asking prospective occupants to nominate someone within the community who can confirm their local connection.
SECTION 7 AFFORDABLE HOUSING ON EXCEPTION SITES

7.6 Section 106 agreements for exception sites

The Authority’s policy objectives in relation to affordable housing on exception sites will be secured by means of a Section 106 legal agreement. The main obligations in the agreement are:

1. All dwellings in the development shall be available as affordable housing in perpetuity.
2. All occupants shall have a local connection and shall have been selected because of their housing need.
3. A dwelling shall only be occupied as the sole or main residence of the occupant.

The Authority has a standard form of agreement which is available on the website. Each party will bear their own legal costs in connection with the S106 agreement.

The Authority will monitor S106 obligations from time to time. The organisations responsible for the management of affordable housing on exception sites should have relevant information available to enable monitoring checks to be made. This should include rent levels, sale price at the last re-sale for low cost ownership schemes and details of occupants' housing need and local connection.

7.7 Sustainability Appraisal for ‘Other Villages’

The smallest communities in the National Park, ‘Other Villages’ in the Core Strategy settlement hierarchy, have limited public transport and facilities and proposals for affordable housing in these villages must be supported by a Sustainability Appraisal.

The purpose of the Sustainability Appraisal is to demonstrate that the proposed site is a suitable location for new affordable housing and that the development will contribute to the environmental, social and economic sustainability of the settlement.

It should include information about:

- Local services such as shops, post offices, pubs, petrol stations and bus services, including any mobile services
- Facilities such as churches, village halls, clubs or play facilities, including those shared amongst groups of parishes
- Community activities taking place on a regular basis
- Journeys people would need to make for work and school, shopping and social activities.

The Authority will support applications where a reasonable part of people’s everyday needs can be met within the local area and where the new development could help retain existing services, for example by providing more custom for a local shop or by keeping
SECTION 7 AFFORDABLE HOUSING ON EXCEPTION SITES

young families in the local community thereby maintaining the need for a local primary school. The Authority will also look at whether the development will help to maintain social support networks and promote a balanced community.

The Authority will make a judgment on the overall balance of information presented as to whether the proposed exception site is a suitable location for the affordable housing scheme.

North York Moors National Park Authority

April 2010
<table>
<thead>
<tr>
<th>Local Service Centre</th>
<th>Helmsley</th>
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<td><strong>Service Villages</strong></td>
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<td>Ampleforth</td>
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<td>Easington</td>
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<td>Guisborough (part located within National Park)</td>
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<td>Scalby</td>
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<td>Sleights</td>
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<td><strong>Other Villages</strong></td>
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<td>Egton Bridge</td>
<td>Nether Silton</td>
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<td>Ellerby</td>
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<td>Faceby</td>
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<td>Fadmoor</td>
<td>Newton under Roseberry</td>
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<td>Gillamoor</td>
<td>Old Byland</td>
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<td>Glaisdale</td>
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<td>Goathland</td>
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<td>Goldsborough</td>
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<td>Grosmont</td>
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APPENDIX B USEFUL CONTACTS

Local planning authority

North York Moors National Park Authority
The Old Vicarage
Bondgate
Helmsley
YO62 5BP
www.moors.uk.net

Local housing authorities

Hambleton District Council
Civic Centre
Stone Cross
Northallerton
DL6 2UU
0845 121 1555
www.hambleton.gov.uk

Ryedale District Council
Ryedale House
Malton
YO17 7HH
01653 600666
www.ryedale.gov.uk

Redcar and Cleveland Borough Council
Belmont House
Rectory Lane
Guisborough
TS14 7FD
01642 774774
www.redcar-cleveland.gov.uk

Scarborough Borough Council
Town Hall
Scarborough
YO11 2HG
01723 232323
www.scarborough.gov.uk

County Council

North Yorkshire County Council
County Hall
Northallerton
DL7 8AD
01609 780780
www.northyorks.gov.uk

Rural Housing Enablers

Hambleton RHE
01609 767048

Scarborough and Ryedale RHE
01723 232323

Housing Associations

Broadacres
Broadacres House
Mount View
Standard Way
Northallerton
DL6 2YD
01609 767900
www.broadacres.org.uk

Endeavour Housing Association
Endeavour House
St Mark’s Court
Thornaby
Stockton on Tees
TS17 6QN
0800 980 9050
www.endeavourha.co.uk
APPENDIX B USEFUL CONTACTS

Coast and Country Housing
14 Ennis Square
Dormanstown
Redcar
TS10 5JR
01642 771300
www.cch-online.org.uk

Home Housing
Knight House
2 Sandbeck Court
Wetherby
LS22 7BA
01937 588497
www.homegroup.org.uk

Sanctuary Housing
Sanctuary House
Unit 15
Killingbeck Drive
Leeds
LS14 6UF
0800 781 0401
www.sanctuary-housing.co.uk

Yorkshire Coast Homes
Brook House
4 Gladstone Road
Scarborough
YO12 7BH
0845 065 5656
www.ych.org.uk

Ryedale Housing Association (part of Yorkshire Housing)
Yorkshire House
6 Innovation Close
Heslington
York
YO10 52F
01904 754420
www.yorkshirehousing.co.uk

Other organisations

Homes and Communities Agency
2nd Floor
Lateral
8 City Walk
Leeds
LS11 9AT
0300 123 4500
www.homesandcommunities.co.uk

The Commission for Architecture
and the Built Environment
1 Kemble Street
London
WC2B 4AN
020 7070 6700
www.cabe.org.uk

National Housing Federation
Manchester Office
City Point
701 Chester Road
Manchester
M32 ORW
0161 848 8132
www.housing.org.uk

Rural Action Yorkshire
William House
Shipton Road
Skelton
York
YO30 1XF
0845 313 0270
www.ruralyorkshire.org.uk
Affordable Housing Viability Assessment for North York Moors National Park Authority

EXECUTIVE SUMMARY

1. District Valuer Services has been commissioned by North York Moors National Park Authority to produce financial appraisals in respect of a number of potential and existing residential use sites across the National Park area.

The appraisals have been designed to assess the impact on development viability of the requirements for the provision of Affordable Housing at a level of 50%, as set out in Core Policy J of the Authority’s Core Strategy and Development Policies Development Plan Document adopted on 13 November 2008. The results from this work are to be included in a revised Housing Supplementary Planning Document currently being prepared.

2. The Authority wish to test viability for a range of sites in a variety of development circumstances. An appraisal approach has been used which would permit this, reflecting the proposed levels of affordable housing and housing mix, as provided by the Authority’s Planning Department.

The ‘modelling’ approach used in this report responds to these requirements. It is important to stress that the prescribed ‘test’ developments, designed to meet the Authority’s combined planning policies, do not necessarily match any existing or future project proposals for the sites in question. No dialogue has been entered into with landowners or developers (in respect of the specific sites) in carrying out this study.

3. The Authority identified 13 sites and buildings in a range of locations for testing. Having considered the properties and any development proposals for them where they existed, in conjunction with the Authority’s Planning personnel, we considered actual/notional development schemes for each site, which would generally meet the current development control objectives. These schemes reflected the requirement for the full provision of affordable housing as required in the Core Strategy and Development Policies DPD.

4. Local market conditions in respect of residential development were considered. It is evident that new build sale prices in the National Park vary quite considerably by area and reflect specification and design quality. As a result, values were ascribed individually to each element of the development on the test sites.
5. We considered assumptions in respect of development costs and other financial and site assumptions required to carry out the appraisals. We assumed there were no “abnormal” development costs, such as for decontamination and off-site highway works, nor any Section 106 planning agreement obligations (other than for affordable homes). Appropriate assumptions were made to determine the building programme for each site.

6. Development appraisals were produced for all 13 sites. The approach used was to determine the appropriate level of developer’s profit after taking into account the costs of development including the proposed affordable housing requirement, likely income from sales, and a suitable level of value for site acquisition having regard to the market conditions and the existing and alternative use values of each of the sites.

We considered that developers would expect a higher level of profit on the Market Value element of the scheme than on the Affordable Housing element reflecting, in the appraisals, the nature of the development and the associated risks. A “blended” result gave developer’s profit of 15% of total scheme costs.

7. The valuations and appraisals were agreed to be as at 13 October 2008, this being the date of the Planning Inspector’s report. Given the current depressed nature of the housing market, use of this date posed some constraints in the collection of meaningful and sufficient raw sales data.

8. The appraisals have been tested for sensitivity analyses to allow for increases in residential market prices at 110% and 120% of those current at the valuation date. This methodology reflects the long term nature of the Authority’s housing policies and the potential for changes in viability as a result of any improvements in the general market.

We have shown the percentage of affordable homes that can be provided on each site at the three different market price levels aforementioned.

9. The results of the study were that the obligation to provide 50% affordable housing (with no social housing grant) was not viable on any of sites as at the valuation date.

10. However, apart from a number of “special case” properties, the majority of the sites do achieve 50% affordable homes, or approaching that level, when prices are 10% and 20% above those applying in October 2008.

11. The results need to be viewed in light of the current property market and the prospects of a recovery during the term of the Authority’s policies. We would
APPENDIX C AFFORDABLE HOUSING VIABILITY ASSESSMENT...
DVS REPORT – EXECUTIVE SUMMARY

anticipate house prices to improve in the short to medium term but it is impossible to say by how much and when. Current market commentaries are very mixed in this regard.

12. A reasonable estimate could be that to achieve the 110% level (compared to October 2008) may take 3/4 years. The 120% level is more problematic and may be some way in the future, although there is no reason to expect that this will not occur during the Authority’s policy period. Underlying land values may not follow, however, as there will have to be a re-alignment of landowner’s aspirations to reflect the new affordable housing requirements.

District Valuer Services
September 2009
The following information should be submitted to the Authority where an independent financial viability assessment is required for a planning application for open market housing incorporating affordable dwellings:

1. Scheme drawings, layouts, brief specifications and dwelling sizes

2. Anticipated sale prices or lease rents with evidence of values of similar schemes in the locality

3. Land cost and fees

4. Build costs of the dwellings and site infrastructure supported by independent quantity surveyor estimates

5. Cost of abnormals, if any, with supporting reports and independent estimates

6. Design and project management fees, planning and building regulation fees

7. Cost of geotechnical and environmental surveys together with a summary of the findings

8. Interim/development finance calculation with details of loan facility from the funder.
# AFFORDABLE HOUSING PROPOSAL FORM

**Applicant/Agent**

**Applicant’s/Agent’s Address**

**Site Location/Address** *(location plan attached)*

**Telephone no.**

**Email address**

**Summary of proposed development** *(please state total number of units, their type and size and the number of bedrooms for each unit)*
### APPENDIX E  AFFORDABLE HOUSING PROPOSAL FORM

**Summary of affordable housing provision** (please state total number of affordable homes, their type, size, number of bedrooms and tenure for each unit. Please also provide a plan of the site with the location of the affordable homes clearly indicated)

<table>
<thead>
<tr>
<th>/* Summary of affordable housing provision */</th>
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**Summary of terms agreed with Registered Social Landlord** (please indicate name of RSL, confirm whether an actual sale price for the affordable homes has been agreed for each unit, and confirm whether Heads of Terms of a s106 agreement have been agreed)

<table>
<thead>
<tr>
<th>/* Summary of terms agreed with Registered Social Landlord */</th>
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</table>
1. The number, type and tenure of the proposed affordable dwellings.

2. The location of the affordable dwellings within the proposed development.

3. Arrangements for the affordable dwellings to be transferred to a Registered Social Landlord at an agreed cost.

4. Confirmation of the partner RSL.

5. Provisions to ensure that the affordable dwellings are affordable in perpetuity.

6. Design and development standards for the affordable dwellings – generally to meet HCA requirements.

7. Arrangements for nominations from the local housing authority.

8. Arrangements for any service charges relating to the affordable dwellings, to ensure affordability.

9. Timescale for completion of the affordable dwellings.

10. Calculation and arrangements for payment of any commuted sums.
APPENDIX G LOCAL OCCUPANCY PROFORMA

LOCAL OCCUPANCY PROFORMA

To be used when applying for full and outline planning permission for Local Needs Housing, to discharge conditions as part of a Condition Verification Check and to confirm accordance with Local Occupancy conditions as part of the National Park Authority’s monitoring procedures. For further information about Local Needs Housing, please refer to the Housing Supplementary Planning Document available at www.moors.uk.net

Address of Local Needs Housing

………………………………………………………
………………………………………………………
………………………………………………………

Planning application reference no. (office use) ..........................................

Do you currently live in the North York Moors National Park? Yes/No

Please complete all sections below which are relevant to your personal circumstances. All information which falls within the definition of personal data under the Data Protection Act 1998 will be used on a strictly confidential basis.

If you currently live in the North York Moors National Park, please complete this section:

Please give your current address

………………………………………………………
………………………………………………………
………………………………………………………

How long have you lived at this address? ............ Years .............Months

If less than 5 years, please give your addresses for the last 5 years with the relevant dates

………………………………………………………
………………………………………………………
………………………………………………………

Please attach documents which give evidence of your place of residence for the last 5 years eg household bills, copies of entry on Electoral Roll
APPENDIX G  LOCAL OCCUPANCY PROFORMA

Please confirm your reasons for needing to move to the proposed Local Needs Housing development.

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If you live outside the North York Moors National Park, please complete this section:

Have you previously lived in the North York Moors National Park? ………………Yes/No

Please give addresses for your previous period(s) of residence in the North York Moors National Park with the relevant dates

From..................To.................... From..................To....................
…………………………………………………………………………………………………………………………
…………………………………………………………………………………………………………………………
…………………………………………………………………………………………………………………………
Please attach documents which give evidence of your previous residence in the National Park eg household bills, copies of entry on Electoral Roll

Do you have a strong and long standing link to the local community ………………Yes/No

If Yes, please give details of your link to the community, including addresses and length of residence of any family members living in the locality

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Please complete any of the following details that apply to you.

Do you need to move to be close to a relative who is currently living in the National Park and requires your support? ………………………………………………………………Yes/No

If Yes, please give details including the name and address of your relative, how long they have lived in the National Park and the reasons for them needing you to live close by to give support.

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APPENDIX G  LOCAL OCCUPANCY PROFORMA

Do you need to move to be close to a relative who can provide you with essential support and who is currently living in the National Park? .....Yes/No

If Yes, please give details including the name and address of your relative, how long they have lived in the National Park and the reasons for you needing to live close by.

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Do you need to move to live close to your place of employment in the National Park? .....Yes/No

If Yes, please give details of your employment including the address, the type of employment, the number of hours and whether it is permanent or temporary. Please provide full details if you are self employed. If you need to move to take up a job offer, please say when your employment will start. Please attach a letter from your employer confirming your employment or job offer.

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This section to be completed by all proposed occupants

How many people are there in your household? ...........

Age Male Female
0-15 ......... .........
16-20 ......... .........
21-64 ......... .........
65+ ......... .........

What type of accommodation do you require (eg house, bungalow, number of bedrooms, garden)?

……………………………………………………………………………………………………………………

Is suitable accommodation available within the existing housing stock to meet your requirements? Please provide details of properties currently on the market in the village where the proposed development is located.

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April 2010