



Hartlepool
Borough Council



Planning Obligations Supplementary Planning Document

June 2026

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Part One – General Principles

1. Introduction

- 1.1. This Supplementary Planning Document (SPD) has been produced to support the 2018 Hartlepool Local Plan and to provide developers and other interested parties with information regarding the council's approach to securing planning obligations or conditions associated with development within the borough.
- 1.2. Planning agreements are allowed for under Section 106 of the Town and Country Planning Act 1990 (as amended). These are agreements between the council and developers (and/or the landowner, where the developer does not own the land) that secure contributions and other obligations to address community and infrastructure needs associated with development. They are sometimes known as "Section 106 agreements" (S106 agreements).
- 1.3. This SPD will supersede the previously adopted Planning Obligations SPD, which was adopted by the council in November 2015. This review is necessary to ensure compliance with local and national planning policy, legislation and guidance and to respond to the changing development industry context. Of particular relevance is the updating of extant figures to reflect the index in addition to informing the detail of policy QP1 of the local plan, this SPD will be a material consideration in determining planning applications, therefore non-compliance may form the basis for the refusal of planning permission.
- 1.4. This SPD is made up of two parts:
 - Part one sets out the council's general principles regarding planning obligations; and
 - Part two explains the thresholds and formulae used to calculate levels of planning obligations that the local authority may wish to seek.
- 1.5. Section 106 agreements must be agreed and in place before planning permission can be granted. It is advised that developers contact the council at the earliest stages of the development process to discuss their proposal and establish whether their proposed development would likely require a S106 agreement.

2. Purpose of the SPD

- 2.1. This SPD has been prepared to comprehensively set out the council's approach, policies and procedures with respect to planning obligations. It aims to provide clarity and enable developers to understand and anticipate any potential financial contributions at the earliest stage.
- 2.2. In line with the National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG), flexibility is embedded within this SPD to ensure the delivery of sustainable development is not unreasonably restricted in the instance of viability issues.
- 2.3. The council will regularly review this SPD and should the economic climate change, the levels of contributions will be reassessed accordingly. If a developer feels that the levels of contribution requested make their development unviable, they will be expected to submit a viability assessment of the scheme at application validation stage to allow for early discussions with a view to avoiding any associated delays.
- 2.4. This SPD provides guidance on the requirements and mechanisms for contributions from development for infrastructure and other related provision. It will:
- Provide greater clarity for developers and applicants;
 - Speed up the processing of applications;
 - Provide a clear framework for understanding requirements and basis for calculating contributions;
 - Play an important role in ensuring community and infrastructure needs are fulfilled as part of new development; and
 - Link to other relevant SPDs that provide additional information.
- 2.5. The key areas of infrastructure for which planning obligations are often sought are:
- Affordable Housing;
 - Play Facilities;
 - Playing pitches and outdoor sport Provision;
 - Built sport Facilities;
 - Highways Infrastructure including sustainable transport options;
 - Education Provision;
 - Community Facilities;
 - Green infrastructure and Ecology;
 - Training and employment; and
 - Heritage assets.

- 2.6. While the above list is not exhaustive, it generally reflects the council`s most common priorities for development sites. There may be circumstances where other contributions are sought to respond to other site-specific issues. In certain circumstances, if it is illustrated that the development would be providing a significant regeneration benefit, there may be an opportunity to reduce the planning obligation contributions associated with the development.
- 2.7. Planning obligations are negotiated on a site-by-site basis as each development proposal will have different circumstances and impacts. Infrastructure priorities may vary and will depend on several factors including local need, central government guidance and the current local and national political agenda.
- 2.8. There may be site-specific requirements other than those highlighted in this SPD and Action Plan that will be identified whilst an application progresses. These should be included in any S106 agreements and may be over and above those identified in the Local Plan Deliverability Risk Assessment, especially where windfall sites come forward.

3. Status of the SPD

- 3.1. This SPD expands on national planning policy and policies within the Hartlepool Local Plan 2018, in particular policy QP1 (Planning Obligations) and will support documents produced as part of the Local Development Framework. The guidance within this SPD will be a material consideration in determining planning applications.

- 3.2. This SPD will be subject to a consultation period of twelve weeks, with feedback being used to prepare a final version. Following this, it will be presented at the Neighbourhood Services Committee and formally adopted at Full Council.

4. National Legislation and Policy

4.1. Planning obligations are normally secured via legal agreements usually made under Section 106 of the Town and Country Planning Act 1990 (as amended), usually in association with planning permission for new development. They normally relate to any aspect of a development that cannot be controlled by imposing a planning condition. They can serve various purposes:

- (a) restricting the development or use of the land in any specified way;
- (b) requiring specified operations or activities to be carried out in, on, under or over the land;
- (c) requiring the land to be used in any specified way; or
- (d) requiring a sum or sums to be paid to the authority on a specified date or dates or periodically.

4.2. The legal tests for when S106 obligations can be used are set out in Regulation 122(2) of the Community Infrastructure Levy (CIL) 2010 Regulations (as amended). These tests state that planning obligations may only be sought if it is:

- Necessary to make the development acceptable in planning terms;
- Directly related to the development; and
- Fairly and reasonably related in scale and kind to the development.

National Planning Policy Framework (NPPF) (2024)

4.3. Guidance regarding planning obligations is set out in paragraphs 35, 56 and 58-59 of the NPPF. The NPPF sets out the tests identified in paragraph 58 and advises that planning obligations should only be used where it is not possible to address unacceptable impacts through a planning condition.

4.4. The NPPF states that Plans should set out the contributions expected from development, further advising that those contributions should not undermine the deliverability of the plan. It is up to the applicant to demonstrate whether circumstances justify the need for a viability assessment at the application stage. The weight to be given to a viability assessment is a matter for the decision maker, having regard to all the circumstances in the case, including whether the plan and viability evidence underpinning it is up to date, and any change in site circumstances since the plan was brought into force.

4.5. A Deliverability Risk Assessment (DRA) was produced to accompany the local plan to illustrate plan-wide viability. The DRA set out infrastructure required to deliver the allocations in the plan and looked at development typologies and examples to illustrate viability. This was considered and agreed by all parties involved in the Local Plan Examination and found to be sound by the Planning Inspector.

Planning Practice Guidance (PPG) (2024)

4.6. The PPG advises that:

- It is not appropriate for SPDs to set out new formulaic approaches to planning obligations beyond those established through development plan policy.
- Plans should set out policies for the contributions expected from development to enable fair and open testing of the policy at examination. Plans should be informed by evidence of infrastructure and affordable housing need, and a proportionate assessment of viability.
- Government funding and delivery programmes for education do not replace the requirement for developer contributions in principle.
- Planning obligations are negotiable. Where they are negotiated on the grounds of viability, the weight to be given to a viability assessment is a matter for the decision maker. If applicants do not agree to a proposed planning obligation, this may lead to a refusal of permission or non-determination of the application.
- Local planning authorities are required to keep any planning obligation details, alongside details of any modification or discharge of the obligation, publicly available.
- Local planning authorities are encouraged to use and publish standard forms to assist with the process of agreeing planning obligations.
- Local planning authorities have to pay back planning obligations if unspent by an agreed date.
- Provision of affordable housing should only be sought for residential developments that are major developments, defined as development where 10¹ or more homes will be provided, or the site has an area of 0.5 hectares or more. In designated rural areas, local planning authorities may choose to set their own lower threshold in plans.
- The restrictions on seeking planning obligations do not apply to development on Rural Exception Sites.
- Affordable housing contributions should not be sought from the construction of a residential annex or extension to an existing home.

Community Infrastructure Levy (CIL)

4.7. The 2010 CIL regulations introduced the ability for councils to charge a levy on most types of new development. Financial contributions would be used towards a defined set of required infrastructure within the locality. The council has not

¹ The 2018 Hartlepool Local Plan has set a threshold of 15 or more dwellings for affordable housing contributions.

introduced a CIL charging schedule and have no current plans to bring one forward.

5. Local Policy

- 5.1. Local planning authorities are required to demonstrate that all development plan documents and SPDs are in conformity with the adopted Development Plan. The council adopted the Hartlepool Local Plan in May 2018 which forms the principal development plan document for the borough. Policy QP1 sets out the overall approach taken towards developer contributions. Policy HSG9 on affordable housing sets out the thresholds related to seeking affordable housing provision or contributions.
- 5.2. The following table links the types of infrastructure set out in this SPD with the key local plan policies.

| Infrastructure Type | Local Plan Policy |
|--|---|
| Affordable housing | HSG9: Affordable Housing |
| Play facilities | INF4: Community Facilities NE2: Green Infrastructure |
| Playing pitches and outdoor sports provision | INF4: Community Facilities NE2: Green Infrastructure NE5: Playing Fields LT1: Leisure and Tourism |
| Built sports facilities | INF4: Community Facilities LT1: Leisure and Tourism |
| Highways infrastructure | INF1: Sustainable Transport Network INF2: Improving Connectivity in Hartlepool |
| Education provision | INF4: Community Facilities HSG4: The South West Extension Strategic Housing Site HSG5: High Tunstall Strategic Housing Site HSG6: Wynyard Housing Developments |
| Community facilities | INF4: Community Facilities HSG4: The South West Extension Strategic Housing Site HSG5: High Tunstall Strategic Housing Site HSG6: Wynyard Housing Developments |
| Green infrastructure | NE1: Natural Environment NE2: Green Infrastructure NE3: Green Wedges NE4: Ecological Networks NE5: Playing Fields NE6: Protection of Incidental Open Space LT1: Leisure and Tourism |
| Training and employment | INF4: Community Facilities |
| Heritage | HE1: Heritage Assets HE2: Archaeology HE3: Conservation Areas HE4: Listed Buildings and Structures |

| | |
|--|---|
| | HE5: Locally Listed Buildings and Structures HE6: Historic Shopping Parades HE7: Heritage at Risk |
|--|---|

- 5.3. Where development sites are within a neighbourhood plan area, developers must have regard to policies set out in any relevant neighbourhood plan. There is currently one made neighbourhood plan within the borough, the Hartlepool Rural Neighbourhood Plan (2018).
- 5.4. The Hartlepool Rural Neighbourhood Plan contains policy PO1 (Planning Obligations) that sets out the overall approach to securing planning obligations in the plan area. It links to appendix 5 of the rural plan that sets out environmental and community improvements for the plan area. Policy H2 on affordable housing sets out the thresholds related to seeking affordable housing provision or contributions. The Rural Plan working group have engaged with residents and sought agreement from Parish Council to update their priorities lists. The lists are contained within appendix E of this document and are considered to supersede those within the Rural Neighbourhood Plan.
- 5.5. The Hartlepool Local Infrastructure Plan was developed to support the production of the local plan in identifying the type of infrastructure required to facilitate and deliver allocations and proposals within the plan. Consideration of the infrastructure costs identified within the Local Infrastructure Plan were built into the Deliverability Risk Assessment and considered at the Local Plan Examination.

6. Types of Development, Threshold and Obligations

- 6.1. The thresholds for seeking planning obligation contributions are set out in Appendix A. Thresholds are set at practical levels that can be easily identified and measured. However, each planning application will be assessed on a case-by-case basis, judged on its merits and in light of its potential impacts.

Residential Development

- 6.2. The threshold for residential development is set between five and fifty units, depending on the type of obligation required. The base level of five units covers the majority of obligation types due to the increase in residents who are likely, and should be encouraged, to use facilities within the vicinity of the site.
- 6.3. For types of development which involve the provision of multiple units with shared facilities (HMO's, Student Accommodation, etc.) the number of units for the purposes of calculating costs will be based on the average bedroom number across Hartlepool of 2.3 persons per dwelling. As such, for an example HMO with 8 bedrooms, the number of units this would be classified as for calculation purposes would be $8 \div 2.3 = 3.4$.

Retail Development

- 6.4. Retail development of at least 500m² gross additional floor space will be expected to contribute towards green infrastructure to enhance the green links within the borough, helping the sustainability of the development, and to mitigate any environmental impacts created by the development. Highway infrastructure, training and employment and the production of a travel plan may also be considered necessary; this will be assessed on a case-by-case basis.

Business Use

- 6.5. Business uses, including offices development, that is of at least 1000m² gross additional floor space, or external area where no building is proposed i.e. with regard to an outdoor storage proposal, will be expected to contribute towards green infrastructure to enhance the green links within the borough, helping the sustainability of the development, and to mitigate any environmental impacts created by the development. Highway infrastructure, training and employment and the production of a travel plan may also be considered necessary; this will be assessed on a case-by-case basis.

Hotels, Boarding and Guest Houses

- 6.6. New Hotels, Boarding and Guest House type development or extensions to existing hotels of more than 10 bedrooms may be expected to contribute towards

green infrastructure, highway infrastructure, training and employment and production of a travel plan. This will be assessed on a case-by-case basis.

Assembly and Leisure

- 6.7. Assembly and leisure types of development that are at least 1000m² gross additional floor space may be expected to contribute towards green infrastructure, highway infrastructure, training and employment and production of a travel plan. This will be assessed on a case-by-case basis.
- 6.8. Any other development will be assessed on a case-by-case basis, based on the potential impacts.

Cumulative Impact of Joined up Developments

- 6.9. Planning obligations will be sought on developments below these thresholds if the council believes that the site is part of a larger development site. When determining contributions, the council will look at the cumulative impact of a number of adjoining small developments. Developing sites incrementally or subdividing a site to avoid contributions will not be acceptable. This would include cases where one site is divided between different developers or is proposed to be developed in a phased manner. This would ensure that necessary contributions are divided fairly between developers on the whole site and that services and facilities would meet overall needs and can be delivered in a comprehensive rather than piecemeal fashion.
- 6.10. Smaller sites may be required to provide financial contributions due to other circumstances, such as a lack of major infrastructure in the area, or if the development's location is deemed to be unsustainable.

7. In-Kind Contributions

- 7.1. The presumption will be that where there is a requirement for on-site infrastructure provision or improvement, the developer will provide this themselves. Where the council wishes to provide certain infrastructure, the developer will be required to donate the required land free of charge, together with a financial contribution in lieu of the developer providing these facilities.

8. Vacant Building Credit

- 8.1. Where a vacant building is brought back into any lawful use or is demolished to be replaced by a new building, the development should be offered a financial credit equivalent to the existing gross floorspace of relevant vacant buildings when the local planning authority calculates any affordable housing contribution which will be sought. Affordable housing may be required for any increase in floorspace. This is known as “vacant building credit”.

9. Pooling of Contributions

- 9.1. In cases where the level of contribution secured by the development is insufficient to fully fund the required infrastructure, the financial contribution will be held by the council and pooled with other contributions from other developments. The pool of money will be used to pay for the implementation of schemes once there are sufficient funds.

10. Unilateral Undertakings

- 10.1. A Unilateral Undertaking is made when an applicant offers a planning obligation in support of a planning application or a planning appeal. The undertaking is submitted when there is no monitoring to be undertaken or triggers stipulated, and the applicant is giving the council a sum of money. When submitted in conjunction with an appeal, the appellant’s solicitors normally draft the Undertaking, although the council and the appellant are required to discuss its terms prior to submission to the Inspector.

11. Index Linking

- 11.1. In large scale developments that are to be delivered in a number of phases, it is likely that financial contributions will be paid in stages. Trigger dates for the payment of financial contributions will be written into the S106 agreement.

- 11.2. In order to maintain the value of the financial contributions between the date of the planning permission and the date they are paid, the payments will be index linked in accordance with the All Items Retail Prices Index excluding Mortgage Interest Payments Index (RPIX) published by the Office for National Statistics, or such replacement index as agreed by the parties within the S106 agreement.
- 11.3. The council will charge interest for the late payment of financial contributions. Any such liability will be written into the S106 agreement so that developers are aware of the implications of late payment and agree to the terms when completing the agreement.

12. Review of baseline figures

- 12.1. The baseline methodologies used in the previous iteration of this document (published 2015) were based on the costs of providing the associated infrastructure, including the costs of labour, materials and otherwise. These assumptions have been updated using the Office for National Statistics ('ONS') Construction Output Price Indices (or 'OPI') from January 2014 to September 2024. These indices provide a figure which aims to reflect the ongoing impact of inflation costs on the construction industry.
- 12.2. The OPI used to calculate the revised figures for public infrastructure costs is the "Public (other than housing) index 2015=100" in "Table 2 New work output prices, not seasonally adjusted, index numbers and percentage change". The baseline index which has informed this report is the September 2024 figure of 138.1 (rounded down to **138**).
- 12.3. For clarity, a worked example of how the 138 index would apply to an example cost is shown below:

| 2015 Cost | September 2024 OPI | Revised 2025 Cost |
|-----------|--------------------|-------------------------------|
| £450 | 138 | $(450 * 138) / 100$ = £621 |

- 12.4. The figures provided within this document form the baseline figures for prospective applications and the council will regularly update these figures. If any legislation or guidance upon which the levels of contributions are based is subject to change, any such changes would be taken into consideration when reviewing this SPD.
- 12.5. Where evidence suggests a significant change to thresholds and the level of developer contributions, the council will rely upon all up to date evidence and figures as a material consideration in the decision-making process.

13. Maintenance Costs

- 13.1. Where contributions are secured for facilities that are predominantly for the benefit of users of the associated development then it may be appropriate for developers to contribute to their maintenance. The length of the maintenance contributions will be determined on a case-by-case basis and will take into account viability considerations. The long-term maintenance of new infrastructure such as parks, SUDs and green spaces will need to be secured should such features not be the subject of adoption by the council or another appropriate public body. In some instances, the maintenance of landscapes, SUDs or estate roads will become the responsibility of an estate management company.
- 13.2. Of particular note, where a developer proposes the use of coloured tarmac in residential development, the maintenance of these surfaced areas will be subject to a commuted sum.

14. Economic Viability

- 14.1. For the developments listed in the table in Appendix A, the council expects the full relevant planning obligation requirements to be taken into account when negotiating the price of the land. The developer must be able to show unknown development costs that could not have reasonably been foreseen at the time the land was bought to consider waiving or reducing any requirements. As per the PPG, the price paid for land is not a relevant justification for failing to accord with relevant policies in the plan.
- 14.2. In the case where the developer does not believe it is viable to pay the planning obligations; the onus is on the developer to justify what changes or differences there are between relevant assumptions made in the Deliverability Risk Assessment (which supported the local plan) and the application.
- 14.3. The NPPF places the onus on the developers to demonstrate whether a viability assessment will be required at application stage and should be prepared with the expectation that they'll be publicly available. Where a viability assessment is submitted with a planning application, the executive summary should refer to the DRA that informed the local plan and summarise what has changed since then to justify the need for the departure from the planning obligations.
- 14.4. If an agreement on the viability position cannot be reached, the view of the District Valuer Service may be sought and/or the application may be

recommended for refusal. The developer will be expected to meet the costs of this referral.

15. Legal and Administrative Costs

- 15.1. Developers will be required to pay any legal/professional fees incurred by the council in the preparation and completion of the agreement.

16. Drafting and finalising Section 106 Agreements

- 16.1. Where pre-application advice has previously indicated that a Section 106 agreement would be necessary to facilitate development, the developer is required to provide draft heads or terms for a proposed S106 agreement on submission of a planning application.
- 16.2. When considering affordable housing provision within a legal agreement, developers are expected to engage with Registers Providers (RPs) and any other necessary organisation/person at an early stage in the development process. Engaging with RPs from the outset better informs viability and deliverability of affordable units, to ensure that affordable home delivery is considered from the outset.
- 16.3. Once an application is determined and the section 106 parameters are agreed within the planning report then, in consultation with the Planning and Development Services department and relevant HBC officers, the agreement will be drafted by the council's Legal Services team, or by solicitors acting on the council's behalf, all at a cost to the developer.

17. Monitoring

- 17.1. The council has an established process for monitoring and managing S106 agreements, including a database with details of all agreements, where provision will be/has been made and where financial contributions have been/will be spent.
- 17.2. There are two aspects to monitoring and managing legal agreements these being:
- Financial monitoring and management of the monies associated with receiving the income; and
 - Physical monitoring.
- 17.3. As of the date of publication, the charge for the monitoring of planning obligations are as follows:

- For minor development (PS Code 13 to 24) £400 per agreement relating to financial monitoring and £450 per agreement relating to physical monitoring.
- For major development (PS Code 1 to 12) £550 per obligation.

17.4 For Discount Market Sale Housing units, a fee of £250 per application should be paid when submitting an application to ascertain the suitability of prospective applicant. The fee can be paid for by the developer, applicant or seller or any such person/organisation acting on the persons behalf.

17.5 The council proactively pursue any late payments. Interest will be added to late payments. Monitoring and management charges will be embodied within S106 agreements.

18. Payment of Obligations

18.1 All developer contributions will be paid to the council on commencement of the development, or at any trigger points as agreed in the S106 agreement. The S106 agreement will contain details regarding the period in which any contributions will have to be spent. If these contributions are towards strategic infrastructure and/or rely on additional grant funding then the period for spending may be longer than five years. The money will be allocated throughout the various council departments to be used towards the delivery of facilities within the borough. A payback mechanism should be included within section 106 legal agreements.

19. Pre-application Enquiries

19.1. Submission of a One Stop Shop enquiry to the council's Development Management team is advisable to seek clarification of the likely obligations that may be sought on prospective developments. Please note there is a fee payable for this service.

Email: development.control@hartlepool.gov.uk

Telephone: (01429) 523741

20. Contact Details

20.1. For further details on any information found within this SPD, the council's Land Use Policy team can be contacted.

Email: landusepolicy@hartlepool.gov.uk

Telephone: (01429) 284308

Part Two – Specific Contributions

21. Affordable Housing

National Policy and Guidance

- 21.1. The NPPF (Annex 2) defines affordable housing as housing for sale or rent, for those whose needs are not met by the market and which complies with one or more of the following definitions:
- a) Affordable housing for rent
 - b) Starter homes
 - c) Discounted market sales housing
 - d) Other affordable routes to home ownership.
- 21.2. In terms of housing, the NPPF aims to significantly boost the supply of housing, both market and affordable. It requires the council to ensure that the local plan meets the full, objectively assessed needs for market and affordable housing in the housing market area.
- 21.3. Where affordable housing needs have been identified, councils are required to set policies for meeting the need on-site for affordable housing unless off-site provision or a financial contribution of broadly equivalent value can be robustly justified.
- 21.4. The NPPF advises that provision of affordable housing should not be sought for residential developments that are not major developments, except in rural areas, where local policies can set a lower threshold. Generally, at least 10% of the homes delivered as part of a major development should be available for affordable home ownership, however local authorities can set their own thresholds.

Hartlepool Local Plan (2018)

- 21.5. The Hartlepool Strategic Housing Market Assessment 2015 (SHMA) informed the local plan. The SHMA identified an affordable housing need of approximately 44%. Whilst this is a high level of affordable housing need, the council appreciates that providing affordable housing as part of private development can have an impact on economic viability. A balance is to be struck between providing affordable housing at a level which is economically viable.

- 21.6. Affordable housing viability work was undertaken in preparation of the local plan. The economic viability assessment showed that the development of residential property on sites with a threshold of 15 or more dwellings would marginally be economically viable (assuming a 12% profit) when contributing 18% affordable housing along with other required contributions.
- 21.7. Local plan policy HSG9 (Affordable Housing) requires the delivery of 18% affordable housing in respect of all applications or proposals for C3 residential developments that consist of a gross addition of 15 dwellings or more. The affordable homes provided should be pepper potted, where appropriate, and be indistinguishable from the market units. More information can be found within the Residential Urban Design Code SPD (2026).
- 21.8. Provision of affordable housing should be on-site but policy HSG9 allows for off-site financial contributions in certain circumstances where applicants are able to provide sound, robust evidence why the affordable housing cannot be incorporated on-site.
- 21.9. Policy HSG9 advises that the affordable provision, tenure and mix will be negotiated on a site-by-site basis having regard to the economic viability of the development and always taking into account the most up-to-date evidence of housing need, aspiration and the local housing market, this can include documents such as the SHMA but can also include information from the council's housing teams with regard to current housing need based on housing waiting lists.
- 21.10. Policy QP1 (Planning Obligations) states that the council may seek obligations relating to affordable housing and housing market renewal.

Hartlepool Rural Neighbourhood Plan (2018)

- 21.11. Policy H2 (Affordable Housing) makes provision for 18% affordable housing to be required in proposals of six or more dwellings (gross). For schemes of between six and ten units, financial contributions in lieu of onsite provision would be acceptable, with any commuted sums used for the provision of affordable housing within or adjacent to the villages in the plan area, as per the 2018 Rural Neighbourhood Plan. This policy also provides a steer on the design and the location within the site for the affordable housing, plus options regarding development viability.

Threshold

- 21.12. Affordable housing will be required on all planning applications for residential development that consist of:

- A gross addition of 6 or more dwellings within the Rural Neighbourhood Plan area; or
- A gross addition of 15 or more dwellings within all other areas of the borough.

21.13. The council will not accept sub-division of sites or phasing of development as an attempt to avoid providing the affordable housing requirement.

Level of Contribution

21.14. An affordable housing target of 18% will be required on all sites above the minimum threshold.

21.15. Rounding down is not an acceptable method. The below shows a worked example of the scenario.

21.16. In cases where the affordable housing figure is calculated as a decimal, the council would require the applicant to provide either:

- The number of units equal to the full amount of whole numbers calculated, plus a financial contribution equal to the remaining amount; or
- The number of units rounded up to the next whole number.

Affordable housing example calculation

Development of 20 dwellings. 18% of 20 = 3.6 affordable housing units.

The applicant would be expected to provide **3 on-site** units and a financial contribution of **0.6** units

£64,809.40 (example cost per affordable house to be paid by developer) x 0.6 =
£38,885.64

Location of Affordable Housing Provision

21.17. In accordance with the local plan, generally all (numerically rounded) affordable housing provision will be expected to deliver on-site. Only in certain circumstances will it be acceptable for provision to be made off-site, and applicants will be required to provide sound, robust evidence to detail why the affordable housing cannot be incorporated on site.

21.18. The delivery emphasis of affordable housing will be strongly favoured to provide on-site provision as there is a short supply of available development land within the urban area of Hartlepool to cater for off-site developments. In the unlikely event that a developer is proposing for the provision of affordable housing off-

site, there should be early discussions with the council to identify a suitable site or sites.

- 21.19. For instances where off-site provision is agreed, the timing of the provision, or the payment of the off-site contribution, will be related to the completion of numbers of properties on the associated general market housing site. The general approach will be to secure completion of the affordable homes proportionally to the general market housing, unless the timing is otherwise agreed with the council. In this situation, affordable housing contributions may directly relate to the council's and registered providers provision of affordable housing.
- 21.20. Where an off-site provision is agreed to be acceptable, the level of contribution is calculated by deducting the transfer price of the unit from its open market value.
- 21.21. The following table shows a calculated example of off-site affordable housing contributions.

Example of Financial Contribution

The off-site contribution is calculated as follows: (a) + (b) = (c). Where:

- (a) = How much a registered provider can secure in finance. This equates to 60% of the market value on an on-site affordable dwelling.
- (b) = Gap funding contribution from the developer. This equates to 40% of the market value on an on-site affordable dwelling.
- (c) = Borough wide average cost of a home within the borough of Hartlepool.

The following scenario illustrates how a 100 dwelling development could contribute to an off-site commuted sum.

| Developer Consideration | Amount |
|---|---------------|
| Total dwellings on the site | 100 |
| Affordable requirement | 18% |
| Affordable units | 18 units |
| Borough wide average cost of a home (new-build) | £205,944* |

Using the above (a) + (b) = (c) equation the following is acceptable:

- (a) + (b) = £205,944
- (a) = 60% of market value = £123,566.40
- (b) = 40% of market value = £82,377.60

The developer is required to provide 18 units, therefore:

Theoretical Off-Site Commuted Sum = 18 x £82,377.60 = **£1,482,796.80**

** Average house price information compiled from Land Registry data. Average price for new build in Hartlepool between February 2024 - February 2025. This figure will be updated annually.*

<https://landregistry.data.gov.uk/app/ukhpi/browse?from=2024-02-01&location=http%3A%2F%2Flandregistry.data.gov.uk%2Fid%2Fregion%2Fhartlepool&to=2025-02-01&lang=en>

Type and Tenure

- 21.22. Developers will be expected to achieve a mix of 70% social rented or affordable rented and 30% intermediate tenure mix on each site. Housing type and tenure split will be negotiated on a site-by-site basis, having regard to the most up-to-date evidence of need, mix of tenures of existing housing nearby, the desire to create balanced communities, and the constraints and requirements of providing on-site provision. Where a developer is proposing a target which deviates from the 70/30 split, there should be early discussions with the council to ensure an appropriate mix is achieved.

Discount Market Sales Housing

- 21.23. Discount Market Sales Housing (DMSH) is a form of 'intermediate' affordable housing outlined within the National Planning Policy Framework (Annex 2) and offers an alternative to shared ownership schemes. DMSH has been developed with the aim of increasing home ownership and to aid those who would otherwise not be able to afford² a home on the development site on which the DMSH is located.
- 21.24. With DMSH the purchaser owns their home outright and the owner is responsible for all repair and maintenance costs.
- 21.25. DMSH represent private developers' contribution to affordable housing and will be subject to terms and conditions contained in a section 106 legal agreement (S106 of the Town and Country Planning Act, 1990 as amended). This SPD puts forward that a fee of £250 should be paid upon submission of a DHMS application however this sum may change, the fee will be set out on the council's website and set out at pre app and application stage.
- 21.26. A more specific policy advising on the DMSH application process is included within this SPD at Appendix F.

Future Management of Affordable Housing

- 21.27. All affordable units, secured as part of a planning application, should be delivered by means of a S106 agreement, with appropriate provision to secure the retention of properties as affordable units in perpetuity, preferably through a registered provider.
- 21.28. The council regards partnership delivery with an RP as the preferred means of securing affordable housing, tied in means of a S106 agreement to which the RP will be party. This would apply to all the forms of affordable housing. Developers should approach the council early in the process to allow for drafting of the S106 agreement and to discuss the involvement of registered provider.

Design and Location of Affordable Housing

- 21.29. The council supports the development of sustainable mixed and balanced communities. To avoid the negative implications of social exclusion and isolation,

² It may be the case that a person would 'otherwise not be able to afford a home' if despite a healthy salary they have a poor credit rating, high necessary outgoings such as necessary debt, child maintenance etc. in these circumstances, if evidenced, then an applicant is likely to be successful. Unsuccessful applicants would be those who have made lifestyle choices and have high outgoings particularly with regard to non-essential outgoings i.e. high car payments, high TV/mobile subscriptions etc. then if such lifestyle choices were adjusted then it's likely that such an applicant would 'otherwise be able to afford a home'.

affordable homes within housing schemes should be evenly distributed across the site (pepper potting) and not disproportionately allocated to the periphery or in one area. The council will normally require affordable homes to be grouped together in clusters of no more than five properties. Affordable properties should not be distinguishable from the market housing.

- 21.30. In apartment developments the council requires this pepper potting to be maintained. However, it is recognised that other issues may impact upon the distribution of affordable units in apartment blocks, including difficulties in their management and financial concerns regarding levels of service charges. The benefits of this will be weighed against the scope to achieve an acceptable degree of pepper potting where required. The level of pepper potting on apartment schemes will therefore be negotiated on a site-by-site basis.
- 21.31. The council expects the location of affordable housing to be discussed and agreed at an early stage in conjunction with any appointed RP. The final location must be agreed before development commences.

Transfer Prices

- 21.32. The council will expect the applicant and registered providers (RPs) to negotiate transfer prices on a site-by-site basis, this is because these are likely to fluctuate depending on matters such as housing market and site conditions.

Future Policy Changes

- 21.33. The council will ensure that evidence is kept up to date. If new evidence would change the levels or mix of affordable housing required, the new evidence will supersede the requirements set out within this draft SPD until such a time as this document is refreshed to reflect any such changes.

22. Built Sports Facilities

- 22.1. Built sports facilities typically constitute indoor built facilities such as leisure centres but can also be built outdoor facilities such as multi-use games area pitches and associated infrastructure. The provision of local sports facilities is essential to the health and well-being of the population. Where development occurs, it is vital that sufficient sports provision is made to allow residents to lead active lifestyles.

National Policy and Guidance

- 22.2. The importance of sport and high-quality facilities is recognised in the NPPF as contributing towards the achievement of various outcomes including:

- Increased participation in physical activity;
- Reducing obesity, particularly amongst children and young people;
- Economic regeneration;
- Increasing access and targeting under-represented groups.

- 22.3. The NPPF promotes the use of sports facilities and advises local authorities to guard against their loss, particularly where this would reduce the community's ability to meet their day-to-day needs. It also identifies the need for local assessments of facilities to identify any qualitative or quantitative issues that need to be addressed, thus helping to ensure adequate provision is made to meet the needs of the community.

- 22.4. Paragraph 83 of the NPPF encourages the council to promote the retention and development of sports venues in rural areas.

Hartlepool Local Plan (2018)

- 22.5. The local plan recognises the need for sports and leisure facilities that will attract large numbers of visitors to locate in sustainable locations in line with national guidance.

- 22.6. Policy INF4 (Community Facilities) states that the council will protect, maintain and improve existing facilities where appropriate. The provision of new facilities to serve developments and to remedy any existing deficiencies will be supported.

- 22.7. Policy QP1 (Planning Obligations) states that the council may seek obligations relating to built sports facilities.

Hartlepool Rural Neighbourhood Plan (2018)

- 22.8. Policy C1 (Safeguarding and Improvement of Community Facilities) protects community buildings, play areas, sports/recreation facilities, allotments and open spaces from loss unless they are surplus to requirements or are being replaced by improved similar provision. The policy is clear that planning obligations will be sought where new development would create the need for new or improved facilities.
- 22.9. The Plan supports new facilities that would be appropriate to their location, and a list of priority schemes for new or improved facilities within the Plan area is provided.

Playing Pitch and Indoor Facilities Strategy

- 22.10. The Strategy provides an evidence base to support investment and the delivery of sport and physical activity across the borough. The Strategy was developed using Sport England guidance and provides a set of strategic priorities for indoor sport and leisure provision to meet existing and future need across the borough.

Thresholds and Levels

- 22.11. Given the importance of sports facilities in creating a healthy and active borough, where people have a range and choice of high-quality activities in which they can partake, it is considered that all developments of five or more dwellings should contribute towards the provisions and or maintenance of built sports facilities.
- 22.12. The level of contribution will be **£345 per new dwelling**. This figure utilises the previous 2015 assumption figure included within the council's "Deliverability of Local Plan Sites" document which underpinned the consideration of the whole local plan's viability and found sound by an inspector. This original figure has since been adjusted using the ONS Construction Output Price Indices from January 2014 to September 2024. This adjustment has been made to account for the impact of inflation on the prior figure.

Location of Provision

- 22.13. Contributions will support the maintenance, and any improvements regarded as necessary to meet demand on existing built sports infrastructure or to contribute to the delivery of necessary new facilities. Developers will be informed at application stage where their contribution may be directed.

Maintenance of Facilities

- 22.14. Given the likely scale of some indoor leisure facilities, and considering development viability, no maintenance costs will be required from developers towards the major facilities such as major new leisure provision. However, there may be some instances where maintenance costs are required for smaller built sports infrastructure. Further information will be provided on a case-by-case basis. If facilities are to be provided by developers themselves, then appropriate arrangements for their long-term management and maintenance need to be secured where such facilities are not to be adopted by the council or some other public body.

23. Play Facilities

- 23.1. Play facilities are typically classed as play parks and areas with play equipment within them. Having sufficient access to outdoor facilities allows all ages to benefit from being outdoors and provides residents with the opportunity to stay fit and active, along with allowing residents to socialise.

National Policy and Guidance

- 23.2. The NPPF promotes the provision and protection of shared spaces and community facilities that would enhance health, social and cultural well-being for all sections of the community.
- 23.3. Paragraph 88 encourages the council to promote the retention and development of community facilities in rural areas.

Hartlepool Local Plan (2018)

- 23.4. Policy QP1 (Planning Obligations) states that the council may seek obligations towards play facilities.
- 23.5. The safeguarding and enhancement of green infrastructure that contains play facilities is stipulated within policy NE2 (Green Infrastructure). Policy INF4 (Community Facilities) is clear that the council will protect, maintain and improve existing facilities and will require and support the provision of new facilities to serve developments and to remedy any existing deficiencies. In doing so, the council will consider the capacity, quality and accessibility of other, similar facilities.

Rural Neighbourhood Plan (2018)

- 23.6. Policy C1 (Safeguarding and Improvement of Community Facilities) protects community buildings, play areas, sports/recreation facilities, allotments and open spaces from loss unless they are surplus to requirements or are being replaced by improved similar provision. The policy is clear that planning obligations will be sought where new development would create the need for new or improved facilities.

Open Space, Sport and Recreation Assessment (2015)

- 23.7. Policy INF4 (Community Facilities) aims to ensure that recreation facilities are provided in accordance with the guidelines set out in the Open Space, Sport and Recreation Assessment. The document was produced with the aim of setting out

proposed standards for quantity, quality and accessibility of different types of open space and recreational facility within the borough. For play, the following standards are recommended:

| Quantity Standard | Quality Standard | Accessibility Standard |
|--|--------------------------|---|
| 0.65 hectares of playable space per 1,000 children aged 16 and under. | Location 71% | A Doorstep Playable Space within 100m walking distance |
| | Play Value 68% | |
| At least three youth spaces specifically designed to accommodate the needs of teenagers, within each sub-area. | Care and Maintenance 60% | A Local Playable Space within 400m walking distance |
| | Overall 67% | A Neighbourhood Playable Space within 1,000m walking distance |
| | | A Youth Space within 800m walking distance |

Thresholds and Levels

- 23.8. Good quality play facilities to meet the needs of all ages should be available throughout the borough and therefore it is important that developments contribute towards the maintenance and enhancement of existing provision or fund new play facilities where existing provision is not of an acceptable quantity, quality or accessibility.
- 23.9. To ensure the appropriate levels of quantity, quality and accessibility, all developments of five or more dwellings should make contributions towards play facilities. **The contribution will be £345 per unit.** This figure utilises the previous 2015 assumption figure included within the council’s “Deliverability of Local Plan Sites” document which underpinned the consideration of the whole local plan’s viability and found sound by an inspector. This original figure has since been adjusted using the ONS Construction Output Price Indices from January 2014 to September 2024. This adjustment has been made to account for the impact of inflation on the prior figure.
- 23.10. On strategic allocated sites, there is a requirement to deliver on-site play facilities, the cost of which shall be met by the developer.

Location and Design of Facilities

- 23.11. Larger sites of more than 100 homes will generally be expected to incorporate on site provision. On smaller sites this contribution will normally be towards off-site facilities within the vicinity of the development. The developer should liaise with the council to ensure that the quality and layout of play facilities meets the requirements.

Maintenance of facilities

- 23.12. Where the developer makes a payment for off-site play facilities, they will also be expected to pay a commuted sum for the maintenance of the facility for a 20-year period from the point at which the facility is completed. Discussions with the appropriate department within the council will be necessary at the planning application stage to determine the level of maintenance contribution that is necessary towards the upkeep of the facility. In the event that facilities are to be provided by developers themselves then appropriate arrangements for their long-term management and maintenance will need to be secured where such facilities are not to be adopted by the council or some other public body.

24. Outdoor Sport including Tennis Courts and Bowling Greens

- 24.1. Playing pitches, tennis courts and bowling greens are typically formalised green spaces that are used for sporting activities.

National Policy and Guidance

- 24.2. The NPPF recognises how open space, including parks and sports fields, plays a vital role in the delivery of sustainable development. It states that there are benefits to accessing high quality open spaces and opportunities for sport and recreation, particularly to the health and well-being of the community. The council should have robust and up-to-date assessments for the need for open space, sport and recreation facilities and opportunities for new provision.
- 24.3. The NPPF advocates the protection of existing open space, sports and recreational buildings and land, including playing fields. They should only be lost where there is a clear surplus, or where they would be replaced elsewhere, or is being replaced by alternative sports and recreational provision that has benefits outweighing the loss of the current or former use. Paragraph 88 encourages the council to promote the retention and development of open spaces in rural areas.

Hartlepool Local Plan (2018)

- 24.4. Policy NE2 (Green Infrastructure) stipulates that Green Infrastructure facilities should be safeguarded and enhanced for outdoor sport. Policy INF4 (Community Facilities) is clear that the council will protect, maintain and improve existing facilities and will require and support the provision of new facilities to serve developments and to remedy any existing deficiencies. In doing so, the council will consider the capacity, quality and accessibility of other, similar facilities.
- 24.5. Policy NE5 (Playing Fields, Tennis Courts and Bowling Greens) enforces the council's position that existing facilities will be protected and only lost in particular circumstances. Where these are lost to development, a planning condition will be sought to secure replacement or enhancement of remaining land.
- 24.6. Policy QP1 (Planning Obligations) states that the council may seek obligations related to playing pitches.

Rural Neighbourhood Plan (2018)

- 24.7. Policy C1 (Safeguarding and Improvement of Community Facilities) protects community buildings, play areas, sports/recreation facilities, allotments and open

spaces from being lost unless they are surplus to requirements or are being replaced by improved similar provision.

- 24.8. This policy supports new facilities that would be appropriate to their location. A list of priority schemes for new or improved facilities within the Plan area is provided. The policy is clear that planning obligations will be sought where new development would create the need for new or improved facilities.

Open Space, Sport and Recreation Assessment (2015)

- 24.9. The Open Space, Sport and Recreation Assessment was produced with the aim of setting out proposed standards for quantity, quality and accessibility of different types of open space and recreational facility within the borough. For outdoor sports facilities, the following standards are recommended:

| Quantity Standard | Quality Standard | Accessibility Standard |
|--|---|---|
| Playing pitches – 0.9ha per 1000 population. | Playing pitches – 66-79% (an ‘average’ pitch) with aspiration to bring all pitches up to the level of a ‘good’ pitch i.e. 80-94%. | New facilities should be focused around existing club bases (and avoid the provision of dispersed pitches). |
| Tennis courts – 0.02ha per 1000 population. | Changing accommodation – 60-89%. | New provision required for housing development should be located off site, or in conjunction with the development of a new club, or satellite club to an existing facility. |
| Bowling greens – 0.03ha per 1000 population. | Tennis courts – 75%. | Synthetic Turf Pitches – 20 minute drive time. |
| | Bowling greens – 76%. | |

Playing Pitch and Indoor Facilities Strategy

- 24.10. The Strategy sets out the key issues and priorities for facilities for football, cricket, rugby union, rugby league, hockey, tennis and bowls across the borough and identifies specific actions, timescales and responsibilities for implementation and delivery. This strategy is currently under review, and once a draft is endorsed this SPD will be updated if necessary.

Thresholds

- 24.11. Good quality outdoor sports facilities to meet the needs of the community should be available throughout the borough and therefore it is important that developments contribute towards the maintenance and enhancement of existing provision or fund new facilities where existing provision is not of an acceptable quantity, quality or accessibility.
- 24.12. To ensure the appropriate levels of quantity, quality and accessibility, all developments of five or more dwellings should make contributions towards the provision and or maintenance of outdoor sports facilities. Strategic sites may be required to provide on-site facilities, the cost of which shall be met by the developer. The contribution on other developments will be as follows:

| Facility | Level of Contribution |
|-----------------|------------------------------|
| Play Pitches | £351.90 per unit |
| Tennis Courts | £86.95 per unit |
| Bowling Greens | £75.50 per unit |

- 24.13. The methodology for arriving at these per unit figures can be found in Appendix B.

Maintenance of Facilities

- 24.14. Where the developer makes a payment for off-site outdoor sports facilities, they may also be expected to pay a commuted sum for the maintenance of the facility for a 20-year period from the point at which the facility is completed. For strategic sites, where the developer is providing the facilities, the onus is on them to maintain the facilities or organise a maintenance company to do so. Discussions with the appropriate department within the council will be necessary at the planning application stage to determine the level of maintenance contribution that is necessary towards the upkeep of the facility. If facilities are to be provided by developers themselves then appropriate arrangements for their long-term management and maintenance will need to be secured where such facilities are not to be adopted by the council or some other public body.

25. Education Facilities

- 25.1. Investment in education is crucial to ensure that all children have a school place. Residential developments should contribute towards maintaining and expanding schools which are likely to be used by children who reside in the development.
- 25.2. Only residential developments should contribute towards education provision, these are the only developments to have a direct impact upon school facilities.

National Policy and Guidance

- 25.3. Paragraph 100 of the NPPF places emphasis on the importance to ensuring enough school places is available to meet the needs of existing and new communities. A duty is placed upon the council to:
- Give great weight to the need to create, expand and alter schools; and,
 - Work with school promoters to identify and resolve key planning issues before applications are submitted.
- 25.4. The PPG advises that where schools receive developer contributions for new school places, funding is reduced to avoid double funding. Government funding and delivery programmes do not replace the requirement for developer contributions in principle. Plans should support the efficient and timely creation, expansion and alteration of high-quality schools and set out pupil yields.

Securing Developer Contributions for Education (2023)

- 25.5. The Department for Education (DfE) has published non-statutory guidance to help local authorities secure developer contributions for education. The guidance sets out that the DfE expects local authorities to seek developer contributions towards school places that are created to meet the need arising from housing development.
- 25.6. Advice is provided on establishing a robust and consistent evidence base, underpinned by the following principles:
- Housing development should mitigate its impact on schools;
 - Pupil yield factors should be based on up-to-date evidence from recent housing developments;
 - The per-pupil average costs of a new school, permanent expansion or temporary expansions should be based on the regional costs published in the DfE School Places Schoolcard or national school delivery cost benchmarking data.

- Developers' contributions should provide funding for construction and land where applicable, subject to viability assessment when strategic plans are prepared and using up-to-date cost information; and
- The early delivery of new schools within strategic developments should be supported where it would not undermine the viability of the school, or existing schools in the area.

Hartlepool Local Plan (2018)

- 25.7. Policy INF4 (Community Facilities) sets out how the council will ensure that all sections of the local community will have access to community facilities. The council will protect, maintain and improve existing facilities and will require and support the provision of new facilities to serve developments and to remedy any existing deficiencies. In doing so, the council will consider the capacity, quality and accessibility of other community facilities.
- 25.8. Policy QP1 (Planning Obligations) states that the council may seek obligations relating to education provision.

Requirements and Exceptions

- 25.9. Education infrastructure is an integral part of new residential development and is essential in order to achieve sustainable communities. Developments that are likely to generate an increased demand for school places will need to contribute towards expanding existing education facilities, where the development is not of a sufficient size to require a new school. This will include contributions and/or the allocation of land to enable schools to be built or extended.
- 25.10. The level of school places required for residential development is informed by the latest available expected pupil yields. These yields determine the expected amount of additional school aged children which would result from residential development. The latest pupil yields for both primary and secondary school places are as follows:
- Primary - 21 per 100 dwellings
 - Secondary - 13.7 per 100 dwellings
- 25.11. Contributions will only be sought for these developments where there is insufficient capacity in existing local schools to cope with the pressures associated with the development in the area. When looking at available capacity, the council will also take into account other developments in the vicinity, the need for schools to maintain a protected surplus, and information on projected future pupil numbers.

Primary Schools

- 25.12. In cases where a school is to be provided on site, the developer will normally be expected to set aside sufficient accessible and fully serviced land and pay towards the construction of the educational facilities to the council's design and specification. Early dialogue between parties will be critical to ensure that additional sources of funding can be obtained to enable the school to be provided at the necessary point in time to meet demand.
- 25.13. In certain circumstances, if the developer can illustrate that the construction of the school cannot be justified in viability terms, the council may be willing to accept a parcel of land on site that would be used to construct new education facilities with a reduced financial contribution to assist with construction costs.

Primary School Financial Contributions

- 25.14. The previous local formula used as part of the local plan making process has been retained, reflecting the number of pupils expected to reside in the dwellings during and beyond completion of a development. It is worth noting that the cost per place is subject to change in line with the most recent produced figures from DfE.

Primary Education Contribution (example of 200 homes)

17.5 community primary school pupils per 100 houses built

3.5 Roman Catholic primary pupils per 100 houses built

Total: 21 primary pupils per 100 houses built

(200 (number of houses to be built)/100) x 21 pupils = 42 (total primary pupils from development)

In order to calculate the overall cost of providing these places, the cost per place must be calculated. The DfE annually updates the costing guidance relating to the provision of educational facilities.

The cost factor per permanent primary school expansion place for the North East region is currently (2023 scorecard): £18,190.

The commuted sum from the development for Primary education can be calculated as $42 \times £18,190 = £763,980$.

Secondary Schools

- 25.15. There is a requirement for investment into existing secondary schools where there is insufficient capacity within nearby schools or where there is capacity, but investment is needed in the building to secure the capacity for the future. In cases where a school is to be provided on site, the developer will normally be expected to set aside sufficient accessible and fully serviced land and pay towards the construction of the educational facilities to the council's design and specification. Early dialogue between parties will be critical to ensure that additional sources of funding can be obtained to enable the school to be provided at the necessary point in time to meet demand.

Secondary School Financial Contributions

- 25.16. The previous local formula used as part of the local plan making process has been retained, reflecting the number of pupils expected to reside in the dwellings during and beyond completion of a development. The calculations for secondary schools are summarised below:

Secondary Education Contribution (example of 200 homes)

10 community secondary school pupils per 100 houses built

3.7 Roman Catholic secondary pupils per 100 houses built

Total: 13.7 secondary pupils per 100 houses built

$(200 \text{ (number of houses to be built)} / 100) \times 13.7 \text{ pupils} = 27.4 \text{ (total secondary pupils from development)}$

In order to calculate the overall cost of providing these places, the cost per place must be calculated. The DfE annually updates the costing guidance relating to the provision of educational facilities.

The cost factor per permanent secondary school expansion place for the North East region is currently (2023 scorecard): £25,018.

The commuted sum from the development for Primary education can be calculated as $27.4 \times £25,018 = £685,493.20$

26. Community Facilities

- 26.1. Community facilities are typically considered to be built facilities for community use i.e. a community centre, health facilities etc. These are vital to ensure communities are prosperous, sustainable, healthy, vibrant and safe. The provision of a range of community facilities is particularly important on large sites where new communities are being created. It is important to ensure the scale of existing facilities can manage expanding populations arising through smaller incremental developments.

National Policy and Guidance

- 26.2. Paragraph 98 of the NPPF requires local authorities to plan positively for the provision and use of shared space, community facilities and other local services to enhance the sustainability of communities and residential environments, and to guard against the loss of valuable community facilities that would reduce the community's ability to meet its day-to-day needs.

Hartlepool Local Plan (2018)

- 26.3. The local plan discusses the provision of community facilities in policy INF4 (Community Facilities). Community Facilities are defined in the local plan glossary as - *services available to residents within the immediate area to provide the day to day needs of the community, this can include village halls, community centres, doctors, dentists, places of worship, recycling facilities and libraries.* This list is not exhaustive, the council are committed to enhancing and providing facilities that assists in reducing the need to access a GP practice and so community facilities can also relate to other medical facilities, not just a doctors practice. The policy sets out how the council will ensure that all sections of the local community will have access to community facilities. In doing so, the council will protect, maintain and improve existing facilities where appropriate and support the provision of new facilities.
- 26.4. Policy QP1 (Planning Obligations) states that the council may seek obligations relating to community facilities.

Rural Neighbourhood Plan (2018)

- 26.5. Policy EC2 (Retention of Shops, Public Houses and Community Facilities) is clear that the loss of a village shop, public house or community building would only be supported where at least one similar facility is available in the village, that the use has been proven not to be economically viable, and there is no realistic intent from the community for the retention of the facility.

- 26.6. Policy C1 (Safeguarding and Improvement of Community Facilities) protects community buildings, play areas, sports/recreation facilities, allotments and open spaces from loss unless they are surplus to requirements or being replaced by improved similar provision.
- 26.7. The policy supports new facilities that would be appropriate to their location. A list of priority schemes for new or improved facilities within the plan area is provided. The plan is clear that planning obligations will be sought where new development would create the need for new or improved facilities.

Joint Health and Wellbeing Strategy

- 26.8. The Hartlepool Joint Health and Wellbeing Strategy sets out the ambition to improve health and wellbeing outcomes and reduce inequalities for the Hartlepool community. The strategy acknowledges the need for community facilities to be available to enable people to live well.

Thresholds

- 26.9. A range of good quality community facilities to meet the health and wellbeing needs of the community should be available throughout the borough and therefore it is important that developments contribute towards the maintenance and enhancement of existing provision or fund new facilities where existing provision is not of an acceptable quality, quantity or accessibility.
- 26.10. To ensure the appropriate levels of quantity, quality and accessibility, the threshold of contributions towards community facilities for residential developments is all developments of five or more dwellings.
- 26.11. The contribution for community facilities will generally be dealt with on a case-by-case basis to allow the impact of the development to be assessed against the need for particular facilities. Advice will typically be sought from the council's public health department and staff representing the NHS, justification will be required with regard to the level of funding that may be required and where such funding may be directed. It may be the case that contributions are required for both organisations.

Maintenance

- 26.12. Contribution for maintenance will vary and be dealt with on a case-by-case basis. In situations where the developer has provided a new community centre facility, the council will seek a commuted sum to provide for the maintenance of

the facility for an agreed period, which is usually 20 years, subject to the viability of the development.

27. Green Infrastructure, Countryside and Biodiversity

- 27.1. Green Infrastructure (GI) typically relates to the provision of strategically planned networks that link existing (and proposed) green spaces with green corridors running through urban, suburban urban fringe and rural areas. Through the maintenance, enhancement and extension of these networks, multi-functional benefits can be realised by local communities, businesses, visitors and the environment.
- 27.2. Provision of GI is closely linked to access to the countryside and the preservation and enhancement of biodiversity.

National Policy and Guidance alignment

- 27.3. The NPPF stipulates, through the environmental objective of sustainable development, that planning policies and decisions should protect and enhance the natural and local environment, explaining mechanisms for achieving this such as providing net gains for biodiversity or protecting and enhancing valued landscapes. Paragraph 103 of the NPPF notes the importance of GI and acknowledges its capability to deliver a wide range benefits to local communities. It states that the council should positively and strategically plan for the creation, protection, enhancement and management of networks of biodiversity and green infrastructure.
- 27.4. The PPG sets out the wider multiple benefits that GI contributes to society, the economy and the natural and built environment. It is recommended that planning obligations could be a potential mechanism for securing and funding GI, depending on individual circumstances.

Hartlepool Local Plan (2018)

- 27.5. Local plan policy NE1 (Natural Environment) sets out that the council will protect, manage and enhance Hartlepool's natural environment, including its biodiversity, ecological networks and GI.
- 27.6. Policy NE2 (Green Infrastructure) directly relates to GI and how the council will safeguard it from inappropriate development and work to improve its quantity, quality, management and accessibility. Strategic green corridors and green spaces can be found on the local plan policies map.
- 27.7. Where an area of open space is lost to development, policy NE2 makes provision for the council to impose planning conditions to ensure the compensatory provision of an alternative site or enhancement of adjoining open

space. Alternatively, a legal agreement may be the most appropriate method to secure compensatory measures.

- 27.8. Policy QP1 (Planning Obligations) states that the council may seek obligations relating to green infrastructure and ecological mitigation and networks.

Rural Neighbourhood Plan (2018)

- 27.9. Policy C1 (Safeguarding and Improvement of Community Facilities) protects community buildings, play area, sports/recreation facilities, allotments and open spaces from loss unless they are surplus to requirements or are being replaced by improved similar provision.
- 27.10. The policy supports new facilities that would be appropriate to their location. A list of priority schemes for new or improved facilities within the plan area is provided. The plan is clear that planning obligations will be sought where new development would create the need for new or improved facilities.
- 27.11. Policy NE1 (Natural Environment) sets out the intention to protect, manage and enhance the area's natural environment.

Hartlepool Green Infrastructure SPD and Action Plan (Consultation Draft) (2020) and the draft Urban Forest Masterplan (2026).

- 27.12. The SPD and its accompanying Action Plan assesses the borough's existing GI and identifies areas that have the potential for improvement and where there are gaps in the current provision that would need addressing in order to meet future needs. The draft Urban Forest Masterplan (2026) actively engaged with residents to understand how they valued the boroughs trees and what they hoped for in the future. The UFMP set out that there is a desire for more trees within the borough and it identified typical areas that could be targeted for tree cover opportunities.

Thresholds and Levels

- 27.13. Given the importance of GI in contributing to places where people want to live, work, visit, play and invest in, and the important of GI's environmental benefits, contributions for residential developments are required on developments of five or more dwellings. Other types of development may be expected to contribute towards this initiative as it is critical in ensuring the town develops in a sustainable way. Contributions can be directed towards the overall facilitation and delivery of the UFMP (or any similar strategy), physical GI works and/or maintenance to the existing GI network.

27.14. The levels of contribution from different development types are set out below.

| Development Type | Level of Contribution |
|-----------------------------------|--|
| Residential | £345 per dwelling |
| Food Retail/Non-Food Retail | £20,000 on developments of at least 500m2 (gross) Contribution increases by £1,000 per additional 100m2 (gross) of floor space. |
| Businesses uses Including offices | £5,000 on developments of at least 1000m2 (gross) Contribution increases by £1,000 per additional 100m2 (gross) of floor space. |
| Other | Case by Case basis |

Ecological Contributions

27.15. Where considered necessary, it may be required for developments to provide an ecology contribution to mitigate any ecological impacts. The council's Ecologist will provide further information on a case-by-case basis for each development. Where it is deemed that a nationally designated site, such as an SSSI site, will be affected by a proposed development, appropriate mitigation measures or contributions to avoid detrimental impacts will be sought.

28. Highway Infrastructure

- 28.1. Accessibility is essential to communities in meeting their day-to-day needs and it is therefore important that a range of transport modes are available as part of a strategic transport network. Highway infrastructure should allow for movement using walking, cycling, public transport and private vehicle.
- 28.2. New developments can have impacts on the strategic transport network and the cumulative effect of a number of developments can produce considerable network pressures.

National Policy and Guidance

- 28.3. The NPPF is clear that the planning system should encourage the use of sustainable modes of transport, the creation of safe access and improvements to the highways network. It advises that any significant impacts on the transport network arising from development, or on highway safety, should be cost effectively mitigated to an acceptable degree.
- 28.4. The NPPF requires that Travel Plans should support all developments that would generate significant amounts of movement.

Tees Valley Combined Authority Strategic Transport Plan 2020-2030 (2020)

- 28.5. This plan gives an overview of the Tees Valley's transport network, noting some of the key issues and challenges. One of the main identified issues is that most travel is currently by private car, citing the need to incentivise and facilitate the modal shift to more sustainable methods of transport. The plan highlights some of the key investments and improvements that are needed over the coming years.

Hartlepool Local Transport Plan (2011)

- 28.6. This plan recognises the significant reductions in funding towards implementing a sustainable travel network within Hartlepool. It also recognises that addressing transport problems and concerns can improve access to jobs and skills, enhance the competitiveness of the region and improve social inclusion, health and access to key services.

Hartlepool Local Plan (2018)

- 28.7. Local plan policy INF1 (Sustainable Transport Network) states that the council will work to deliver an effective and sustainable transport network with the overall aim of reducing the need to travel. The policy sets out a suite of key priorities to assist in achieving this aim. Policy INF1 explains that where appropriate, development will be required to contribute to the delivery of a sustainable transport network and promote sustainable travel.
- 28.8. Further support in delivering sustainable transport options is provided by policy INF2 (Improving Connectivity in Hartlepool). The policy is clear that planning obligations will be sought to secure any improvements to the transport network that are required as a result of development. Developers will need to prepare a Travel Plan for development that is likely to generate significant amounts of movement.
- 28.9. Policy QP1 (Planning Obligations) states that the council may seek obligations relating to highway and rail infrastructure and sustainable transport measures.

Rural Neighbourhood Plan (2018)

- 28.10. Policy T1 (Improvements to the Highway Network) sets out some known highway schemes that could be contributed to via planning obligation, if required to make a development proposal acceptable. Similarly, policy T2 (Improvement and Extension of the Public and Permissive Rights of Way Network) sets out some potential projects relating to walking and cycling routes.

Hartlepool Transport Assessment and Travel Plans SPD (2010)

- 28.11. The SPD gives additional guidance to that set out in the local plan with regard to transport and accessibility by encouraging a choice of transport options for new development that are safe, efficient, clean and fair. The document encourages developers to take into account transport issues at an early stage in the preparation of development proposals and describes the measures that should be taken to achieve transport objectives through the implementation of Travel Plans.

Off-Site Provision

- 28.12. Assuming that car ownership and use patterns remain or increase, it can be expected that new developments will increase the number of vehicular trips on the surrounding highway network. In these circumstances, works or contributions may be required to mitigate the negative impacts of the development.

- 28.13. To assess the impacts that the developments will have on the highway network, the council will work closely with neighbouring authorities (where there are cross boundary implications) and National Highways to ensure proposed development would not adversely impact the highway network to the extent that the development would be unacceptable.
- 28.14. Developers must provide appropriate improvements to the highway network within the vicinity of their site to cater for increased vehicular movement, or increased size of vehicles needing to use nearby junctions, arising from the development. The extent of any improvements required will be determined in light of the Transport Assessment or Statement submitted with the planning application.
- 28.15. All works required under the Transport Assessment or Transport Statement will need to be secured under the S106 agreement or via planning condition or appropriate highways agreement.

Level of Contribution for Off-Site Works

- 28.16. The type and level of contribution required for off-site highways works can only be determined on a site-by-site basis through the development's Transport Assessment/Statement. If there is an existing use on the development site, the traffic generation from that use will be considered when determining the impact of the new proposal. The developer will only be expected to mitigate the impact of the additional traffic caused by their proposed new use.
- 28.17. Where highway works are needed as a direct result of the development, the developer will be required to pay the full cost of the mitigation measures, unless they have secured any grant funding. The presumption will be that the works will either be carried out by the Local Highway Authority, or by the developer to a specification and timetable agreed with the council. The timing of the works will be subject to conditions or relevant legal agreements.
- 28.18. Where separate developments will cumulatively result in need for off-site highways improvements, contributions will be required from each development towards these works where possible. The level of contribution for each development will be determined by applying a pro-rata contribution based on the trip generation of each development.

29. Training and Employment

- 29.1. Within all new development it is important to encourage Local Labour Agreements and training initiatives to help provide local people with an opportunity to gain employment or training as part of the development.
- 29.2. Such initiatives can help to ensure that new developments employ a certain percentage of unemployed people, local residents and people with disabilities and also help to maintain these positions and levels in the future.

National Policy and Guidance

- 29.3. Securing training and employment for local people contributes to several aspects of sustainable development and communities, as advocated in the NPPF. This includes limiting the need to travel, strengthening the economy and improving the prosperity and wellbeing of communities.
- 29.4. In particular paragraph 85 of the NPPF states that Planning policies and decisions should help create the conditions in which businesses can invest, including granting a significant weight to the need to support economic growth and productivity, considering both local business needs and wider opportunities for development.

Hartlepool Local Plan (2018)

- 29.5. The local plan acknowledges that Hartlepool currently suffers from low employment rates and low levels of skills. It seeks to deliver through its overall strategy, a borough with an improved quality and standard of living, with increased job opportunities through developing a strong, diverse and thriving local economy.
- 29.6. One of the local plan's 17 spatial objectives is to support the development of educational and training facilities that will develop a skilled workforce.
- 29.7. Policy QP1 (Planning Obligations) states that the council may seek obligations relating to training and employment.

Thresholds and Levels

- 29.8. All new developments of the same size or over the thresholds in the table below will be encouraged to put in place a training and employment plan. The level of

commitment to be outlined within each training and employment plan will be assessed on a case-by-case basis.

| Development Type | Threshold |
|---------------------------------|----------------------------|
| Residential | 10 or more units |
| A1: Food Retail/Non-Food Retail | 500m2 floor space (gross) |
| B2: Including Offices | 1000m2 floor space (gross) |
| C1: Hotels | Case-by-case basis |
| D2: Including Leisure | 1000m2 floor space (gross) |
| Other | Case-by-case basis |

Delivery Requirements

- 29.9. Where a development is to include training and employment as part of a S106 agreement, the council may ask for targeted recruitment and training requirements relating to both the construction of developments and the long-term recruitment policy of the company who would operate the building or development.
- 29.10. Early discussions with the council will ensure there is a clear understanding of specific targeted recruitment and training requirements considered for the development. It will also help set out the mechanisms to ensure these requirements can survive delays, changes in developer or other changes in circumstances that may influence the requirements of the development.

30. Heritage Assets

- 30.1. Hartlepool has a wealth of built and natural heritage assets throughout the borough, including conservation areas, listed buildings, heritage assets of local interest, including those identified on the Local List and historic trees such as veteran trees. Together, Hartlepool's heritage assets make a significant contribution to the character, attractiveness and historical legacy of the area.

National Policy and Guidance

- 30.2. The Government's commitment to the protection and enhancement of heritage assets through the planning system is set out in section 16 of the NPPF. This requires local authorities to have a positive strategy for the conservation and enjoyment of the historic environment.
- 30.3. The NPPF is clear that heritage assets are irreplaceable resources, and the presumption should be in favour of their conservation. There is an emphasis on avoiding harm but also on the desirability of enhancing the significance of heritage assets.

Hartlepool Local Plan (2018)

- 30.4. The local plan sets out the council's positive approach to the protection, preservation and enhancement of heritage assets. Policies specifically cover conservation areas, listed buildings, archaeology, locally listed buildings, historic shopping parades and heritage at risk, as well as a general policy that relates to all heritage assets.
- 30.5. Policy QP1 (Planning Obligations) states that the council may seek obligations relating to heritage.

Rural Neighbourhood Plan (2018)

- 30.6. Through policies HA1, HA2, HA3 and HA4, the Rural Neighbourhood Plan sets out a strategy to protect, conserve and enhance the area's heritage assets.

Thresholds and Levels

- 30.7. In the circumstances where a development would harm heritage assets or their settings, mitigation measures may be required as part of the development in order to provide benefits that would outweigh the harm.
- 30.8. There are no set thresholds and levels in relation to heritage assets. The impact of development and the necessary contribution to mitigate impacts will vary

depending on each development and so will be assessed on a case-by-case basis.

Delivery Requirements

- 30.9. Mitigation measures could include, but would not be limited to:
- In kind payments, including land transfers. This could include the transfer of an at-risk asset.
 - Repairs and improvements to, and the maintenance of, heritage assets where they are an infrastructure item as defined by the Planning Act 2008, such as cultural or recreational facilities, transport infrastructure, and green and social infrastructure such as parks and gardens.
 - Opportunities for funding improvements to, and the mitigation of adverse impacts upon, the historic environment. This could include archaeological investigations, access and interpretation and the repair and reuse of buildings or other assets.
- 30.10. There may be cases where the viability of a proposal, which would provide a benefit to heritage assets, would be threatened by planning obligation requirements. In these cases, if the viable alternative may represent harm to heritage assets, there may be scope for negotiation regarding the level of contributions to ensure the protection and enhancement of heritage assets.

31. Durham Coast SPA

- 31.1. Heritage Coasts are strips of coastline, defined by Natural England in agreement with the relevant local authority, which represent the most special, undeveloped coastlines in the country. As the relevant authority for the area under the Conservation of Habitats and Species Regulations, the council have an obligation to mitigate recreational impacts on the Teesmouth and Cleveland Coast Special Protection Area (SPA).
- 31.2. The council has developed a mitigation strategy and delivery plan to implement a programme of monitoring and mitigation measures to address potential adverse effects on Hartlepool's coastal European Protected Site, which can be caused from increased visitor pressures resulting from new planned residential development.

National Policy and Context

- 31.3. The Government's commitment to the protection and enhancement of the natural and local environment through the planning system is set out in section 15 of the NPPF. Paragraph 187c of the National Planning Policy Framework (March 2012) states that local authorities should: 'maintain the character of the undeveloped coast, while improving public access to it where appropriate.'
- 31.4. The Conservation of Habitats and Species Regulations 2017 mandates proactive measures to safeguard protected areas from adverse effects such as increased recreational disturbance from development.
- 31.5. The 2025 Natural England feature condition assessment for the Teesmouth and Cleveland Coast SSSI provides direct evidence of localised impacts. Several monitored features are now classified as "*Unfavourable – declining*". The assessment highlights recreational disturbance and trampling as contributing factors, particularly within dune systems where footpaths and high visitor pressure are cited as key management challenges.

Hartlepool Local Plan (2018)

- 31.6. Policy QP1 (Planning Obligations) states that the council may seek obligations relating to Suitable Alternative Natural Green Space and/or Mitigation for recreational disturbance on the Teesmouth and Cleveland Coast SPA – Mitigation guided by the council's Endorsed Mitigation Strategy and Delivery Plan which sets out the funding formula for mitigation.

Thresholds and Levels

31.7. As the impact on the SPA is a result of the intensification of visitor pressures on these sites, the capability of new visitors to access this space would result in varying amounts of impact. As such, the level of contributions expected for each new dwelling would depend on the location of that dwelling in relation to coast, with closer dwellings expected to result in more impact.

31.8. The expected contributions are set out below:

| Distance Band (from SPA boundary) | Existing Contribution (2017) | Proposed Contribution (2025) |
|--|-------------------------------------|-------------------------------------|
| 0–1 km (walking distance) | £250 | £350 |
| 1–6 km (car required) | £150 | £200 |
| 6–12 km (car required) | £100 | £150 |
| 12+ km (car required) | £0 | £50 |

Revised Developer Contribution Table

| Provision Level | Existing Contribution (2017) | Proposed Contribution (2025) |
|--|-------------------------------------|-------------------------------------|
| No SANGS & no Council sites | £150 | £200 |
| Reliance on Council sites | £100 | £150 |
| Adequate SANGS provided | £0 | £0 |

SANGS Provision Contribution (Per Dwelling)

| Residential Development (including HMOs as set out in paragraph 6.3 above) | | | |
|---|-----------------------------|--|--|
| Contribution towards | | Threshold (i.e. this amount and over will be required to contribute) | Level of Contribution |
| Affordable Housing / Housing Market Renewal | | 6 units within the Rural Neighbourhood Plan area or 15 within the remainder of the Borough | 18% |
| Built Sports facilities | | 5 units | £345 per dwelling |
| Community Facilities – Education | | 5 units | Case-by-case |
| Other Community Facilities | | 5 units | Case-by-case |
| Green Infrastructure | | 5 units | £345 per dwelling |
| Highway Infrastructure | | Site-by-site | Case-by-case |
| Outdoor sport and play facilities - <i>Children's Play / Play Facilities</i> | | 5 units | £345 per dwelling |
| Outdoor sport and play facilities - <i>Playing Pitches</i> | | 5 units | £351.90 per dwelling |
| Outdoor sport and play facilities - <i>Tennis Courts</i> | | 5 units | £86.95 per dwelling |
| Outdoor sport and play facilities - <i>Bowling Green</i> | | 5 units | £75.50 per dwelling |
| Teessmouth and Cleveland Coast SPA - Mitigation Strategy | | 10 units and over | Case-by-case (<i>see chapter 30</i>) |
| Training and Employment | | 10 units and over | Case-by-case |
| Travel Plan | | 50 units and over | N/A |
| Commercial and Other Development | | | |
| Land use | Contribution towards | Threshold (i.e. this amount and over will be required to contribute) | Level of Contribution |
| Retail – Shops (<i>all other uses for visiting members of the public on a case-by-case</i>) | Green Infrastructure | 500m ² (gross) floorspace | £20,000 for initial 500m ² (gross). Contribution increases by £1,000 per additional 100m ² (gross) floorspace |
| | Highway Infrastructure | | Case-by-case |
| | Training and Employment | | Case-by-case |
| | Travel Plan | | Case-by-case |
| Business uses Including offices | Green Infrastructure | 1000m ² (gross) floorspace | £5,000 for initial 1,000m ² (gross). Contribution increases by £1,000 per additional 100m ² (gross) floorspace |
| | Highway Infrastructure | | Case-by-case |
| | Training and Employment | | Case-by-case |
| | Travel Plan | | Case-by-case |
| Hotels, <u>Boarding and Guest Houses</u> | Green Infrastructure | New hotels or extensions of 10 bedrooms to existing hotels | Case-by-case |
| | Highway Infrastructure | | Case-by-case |
| | Training and Employment | | Case-by-case |
| | Travel Plan | Case-by-case | |
| Leisure facilities | Green Infrastructure | 1,000m ² (gross) floorspace | Case-by-case |
| | Highway Infrastructure | | Case-by-case |
| | Training and Employment | | Case-by-case |
| | Travel Plan | Case-by-case | |

Appendix B - Outdoor Sports and Play Facilities Calculations

Information found at Sport England's Facility Costs document³:

<https://www.sportengland.org/guidance-and-support/facilities-and-planning/design-and-cost-guidance/facility-cost-guidance>

Playing Pitches

| Facility Type | Area (m ²) | Capital Cost (£) | Cost per m ² (£) |
|---|------------------------|------------------|-----------------------------|
| U8/U7 Mini Football Natural Turf Pitch | 1,419 | 30,000 | 21.14 |
| U16/U15 Youth Football Natural Turf Pitch | 5,917 | 95,000 | 16.05 |
| Senior Football Natural Turf Pitch | 7,420 | 110,000 | 14.82 |
| Rugby League Natural Turf Pitch | 9,028 | 150,000 | 16.61 |
| Rugby Union Natural Turf Pitch | 10,400 | 170,000 | 16.35 |

Average cost of a pitch per m² = $(21.14 + 16.05 + 14.82 + 16.61 + 16.35) / 5 = \mathbf{£17}$

The playing pitch standard is 9,000m² per 1,000 population, which equates to **9m²** per person.

Therefore, the cost per person of Hartlepool's playing pitch standard is £17 x 9 = £153.

Based on a household of 2.3 persons, this is **£351.9** per unit/household.

Tennis Courts

| Facility Type | Area (m ²) | Capital Cost (£) | Cost per m ² (£) |
|--|------------------------|------------------|-----------------------------|
| 2 Court Macadam, Fenced, Sports Lighting | 1,227 | 255,000 | 207.82 |
| 4 Court Macadam, Fenced, Sports Lighting | 2,342 | 445,000 | 190 |
| 6 Court Macadam, Fenced, Sports Lighting | 3,456 | 585,000 | 169.27 |

Average cost per m² = $(207.82 + 190 + 169.27) / 3 = \mathbf{£189.03}$

³ Most recent available figures are third quarter of 2024

The tennis court standard is 200m² per 1,000 population, which equates to **0.2m²** per person.

Therefore, the cost per head of Hartlepool's tennis court standard is £189.03 x 0.2 = £37.81.

Based on an average household of 2.3 persons, this is **£86.95** per unit/household.

Bowling Green

| Facility Type | Area (m ²) | Capital Cost (£) | Cost per m ² (£) |
|---|------------------------|------------------|-----------------------------|
| Natural Turf Bowling Green, Flat or Crown Green | 1,600 | 175,000 | 109.38 |

Cost per m² = **£109.38**

The bowling green standard is 300m² per 1,000 population, which equates to **0.3m²** per person.

Therefore, the cost per head of the standard is £109.38 x 0.3 = **£32.80**

Based on an average household of 2.3 persons this is **£75.50** per unit/household.

Appendix D - non-residential sustainable transport contributions note

The National Planning Policy Framework (NPPF) and Hartlepool Local Plan policy seeks to ensure that development users can access the development by sustainable means, this is to ensure matters such as, but not limited to, climate change and physical and mental health can be addressed/mitigated. The onus is upon the applicant to demonstrate how their proposal complies with planning policy and to justify any deviation from it. If an applicant cannot design the scheme so that users can access the development by sustainable modes of transport then the council offers the applicant the option to pay a financial contribution that can be used to facilitate an agreed scheme on council owned land.

Some of the key NPPF paragraphs and local plan policy, is set out below. The list is not exhaustive, and further policies may be applied at application stage.

NPPF paragraph 109 sets out that:

Transport issues should be considered from the earliest stages of plan-making and development proposals, using a vision-led approach to **identify transport solutions** that deliver well-designed, sustainable and popular places. This should involve:

- a) making transport considerations an important part of early engagement with local communities;
- b) ensuring patterns of movement, streets, parking and other **transport considerations are integral to the design of schemes**, and contribute to making high quality places;
- c) **understanding and addressing the potential impacts of development on transport networks;**
- d) **realising opportunities from existing or proposed transport infrastructure**, and changing transport technology and usage – for example in relation to the scale, location or density of development that can be accommodated;
- e) **identifying and pursuing opportunities to promote walking, cycling and public transport use; and**
- f) identifying, assessing and taking into account the environmental impacts of traffic and transport infrastructure – including appropriate opportunities for avoiding and mitigating any adverse effects, and for net environmental gains.

NPPF paragraph 110 sets out that:

The planning system should actively manage patterns of growth in support of these objectives. Significant development should be focused on **locations which are or can be made sustainable, through limiting the need to travel and offering a genuine choice of transport modes**. This can help to reduce congestion and emissions, and improve air quality and public health. However, opportunities to maximise sustainable transport solutions will vary between urban and rural areas, and this should be taken into account in both plan-making and decision-making.

NPPF paragraph 115 sets out that:

In assessing sites that may be allocated for development in plans, or specific applications for development, it should be ensured that:

- a) **sustainable transport modes are prioritised** taking account of the vision for the site, the type of development and its location;
- b) safe and suitable access to the site can be achieved for all users;

- c) the design of streets, parking areas, other transport elements and the content of associated standards reflects current national guidance, including the National Design Guide and the National Model Design Code; and
- d) any significant impacts from the development on the transport network (in terms of capacity and congestion), or on highway safety, can be cost effectively mitigated to an acceptable degree through a vision-led approach.

NPPF paragraph 117 sets out that:

Within this context (of paragraph 116), applications for development should:

- a) **give priority first to pedestrian and cycle movements, both within the scheme and with neighbouring areas;** and second – so far as possible – to facilitating access to high quality public transport, with layouts that maximise the catchment area for bus or other public transport services, and appropriate facilities that encourage public transport use;
- b) address the needs of people with disabilities and reduced mobility in relation to all modes of transport;
- c) create places that are safe, secure and attractive – which minimise the scope for conflicts between pedestrians, cyclists and vehicles, avoid unnecessary street clutter, and respond to local character and design standards;
- d) allow for the efficient delivery of goods, and access by service and emergency vehicles; and
- e) be designed to enable charging of plug-in and other ultra-low emission vehicles in safe, accessible and convenient locations.

NPPF paragraph 96 sets out that:

Planning policies and decisions should aim to achieve healthy, inclusive and safe places which:

- a) promote social interaction, including opportunities for meetings between people who might not otherwise come into contact with each other – for example through mixed-use developments, strong neighbourhood centres, street layouts that allow for easy pedestrian and cycle connections within and between neighbourhoods, and active street frontages;
- b) are safe and accessible, so that crime and disorder, and the fear of crime, do not undermine the quality of life or community cohesion – for example through the use of well-designed, clear and legible pedestrian and cycle routes, and high quality public space, which encourage the active and continual use of public areas; and
- c) **enable and support healthy lives, through both promoting good health and preventing ill-health, especially where this would address identified local health and well-being needs and reduce health inequalities between the most and least deprived communities – for example through the provision of safe and accessible green infrastructure,** sports facilities, local shops, access to healthier food, allotments and layouts that encourage walking and cycling.

Local Plan policy INF1 (Sustainable Transport Network) sets out (in part) that:

The Borough Council will work with key partners, stakeholders and other local authorities to deliver an effective, efficient and sustainable transport network, within the overall context of aiming to reduce the need to travel. In Hartlepool the key priorities of a sustainable transport network are to:

- 1) support sustainable economic growth and inward investment by improving reliability and minimising delays;
- 2) improve opportunities for access to employment and training, particularly for those without private transport;
- 3) provide realistic alternatives to travel by private car; and
- 10) provide a comprehensive, safe and well-managed network of footpaths and cycle routes throughout the Borough linking residential areas with employment sites, shopping and community facilities, and leisure/recreation sites.

The paragraphs and policy above demonstrate that applicants should consider sustainable transport options from the outset, they should not be an afterthought, they should consider those without access to private transport and solutions may be appropriate that are beyond the red line boundary. In addition to the links between sustainable transport modes and the environment paragraph 96 sets out the importance of supporting healthy lives for example through the provision of green infrastructure.

If the applicant cannot meet with the requirements of the above, and other relevant policies, they SPD sets out that a financial sum could be paid to assist in facilitating a scheme. The sums within this SPD are a maximum figure and set out as a guide so that from the onset an applicant knows of a financial sum they may be expected to pay. The council operates a successful programme of providing quality advice regarding what may be the most appropriate.

The council considered that there are many schemes that could be facilitated to ensure development is accessible by a choice of sustainable transport modes. For example, improvements could be made to key walking and/or cycling routes, improvements could be in the form of physically providing and/or maintaining foot and cycle ways, tree planting along key routes and or the provision of other enhancements that would encourage people to use sustainable modes. People are more likely to use sustainable routes if they are, for example, safe, attractive, offer shade and shelter and have resting places.

During negotiations regard will be had to the CIL tests to ensure that any scheme proposed and money secured will be necessary to make the development acceptable in planning terms, directly related to the development and fairly and reasonably related in scale and kind to the development.

Applicants are advised to discuss any matters relating to planning obligations from an early stage.

Appendix E: Hartlepool rural neighbourhood plan individual village environmental and community improvement priorities

Hartlepool Rural Plan Group members, having reviewed the priorities list for each parish, referred each list back to the respective parish council for input. It was determined there were no major changes required. The list below is the 2026 revised priorities list, that should be considered when applications are submitted within the Rural neighbourhood Plan area.

Should S016 monies became available the Hartlepool Rural Plan Group would recommend that developers and/or the Borough Council consult the relevant parish council as to their immediate priorities.

Many community facilities in villages are managed privately, and therefore contributions from developers should be directed to the relevant organisation.

General Heritage priorities

- Interpretation boards at scheduled monuments and other key sites.
- Reduction in traffic signs and poles.

Dalton Piercy:

- Superfast Broadband to all homes in the parish
- Play area equipment
- Revamp of village pond
- Historical interpretation boards
- Green infrastructure improvements (not tree planting)
- Period street lights
- EV charging facility
- Collapsible bollards
- Reduction in street furniture along the Village Green, e.g. traffic signs, poles

Heritage priorities

- Enhancement of the village green

Elwick:

- Traffic management
- Provision for school play area to be open at weekends for sports activities for local children
- CCTV and monitoring for the Playing Field
- More equipment for the Playing Field
- An appropriate rural footway along the road to Hartlepool (accessible to prams and wheelchairs)
- New village hall with parking
- Interpretation board
- Resurfacing of road to south of the village green to reflect the appearance of the Conservation area

Heritage priorities

- Enhancement to the environment of Elwick Village Green by resurfacing of access lanes with, for example, resin-bonded gravel to give a more informal appearance.
- Enhancement of Elwick Village Green

Greatham:

- Improvements to the Community Centre
- Improvement of facilities at the Sports Field
- Relocation of historic Salt Pump to village site
- Interpretation boards and blue plaques (Heritage interpretation)
- Improving rights of way
- Improved play equipment
- Continuing replacement of tarmac hard standing with setts/blocks
- Re-site High Street overhead cables underground
- Environmental enhancements
- Traffic management

Heritage priorities

- A new article 4 Directive in Greatham Conservation Area and encouragement to use appropriately designed windows, doors, boundary features and other features.
- Environmental enhancement at Greatham of the areas around The Green, the area to the front of the Hospital of God, High Street and the area around Vicarage Row including landscaping works, paving, other resurfacing works and lighting.
- Enhancement of Greatham village green and the Little Green, Front Street

Hart:

- A new multi-purpose community open space
- An equipped play area
- A sports pitch
- A wildlife area
- A dog walking area
- Allotments
- Period (rural) uniform lighting through Front Street
- Remove village barriers
- Re-site overhead cables underground

Heritage priorities

- Enhancement of the environment in the area around Hart Church and the medieval walls.

Newton Bewley:

- A functioning speed camera
- Traffic noise monitoring and abatement measures
- Footpath to Wolviston made accessible for disabled.
- Air pollution monitoring and abatement measures
- Superfast WiFi
- Enhancement of the village green

Appendix F – Discount Market Sales Housing Policy

Hartlepool Borough Council – Discount Market Sales Housing (DMSH) 2025

Background

Discount Market Sales Housing (DMSH) is a form of ‘intermediate’ affordable housing outlined within the National Planning Policy Framework (Annex 2) and offers an alternative to shared ownership schemes. DMSH has been developed with the aim of increasing home ownership and to aid those who would otherwise not be able to afford¹ a home on the development site on which the DMSH is located².

With DMSH the purchaser owns their home outright and the owner is responsible for all repair and maintenance costs. DMSH represent private developers’ contribution to affordable housing and will be subject to terms and conditions contained in a section 106 legal agreement (S106 of the Town and Country Planning Act, 1990 as amended).

This SPD establishes the terms and conditions relating to all DMSH properties secured through section 106 agreements, which are binding in perpetuity upon the owner of any DMSH, and upon any other party with an interest in the land - i.e. a Mortgagee.

Level of Percentage Discount

This policy seeks to ensure DMSH properties remain within reach of people on local incomes but without making development schemes economically unviable. This is achieved through a percentage discount.

DMSH will be sold at an appropriate discount, typically up to 40% from the open market value. The percentage discount should be discussed during planning application stage and will be agreed on a case-by-case basis subject to site location, the particulars of the planning application and viability.

Administration and Monitoring fee per DMSH application

The Community Infrastructure Levy (Amendment) (England) (No.2) Regulations 2019 allow Local Authorities to charge monitoring fees through s106 planning obligations, to cover the cost of the monitoring and reporting on delivery of that s106 obligation as described above. The regulations require that monitoring fees must be proportionate and reasonable and reflect the actual cost of monitoring.

¹ It may be the case that a person would ‘otherwise not be able to afford a home’ if despite a healthy salary they have a poor credit rating, high necessary outgoings such as necessary debt, child maintenance etc. in these circumstances, if evidenced, then an applicant is likely to be successful. Unsuccessful applicants would be those who have made lifestyle choices and have high outgoings particularly with regard to non-essential outgoings i.e. high car payments, high TV/mobile subscriptions etc. then if such lifestyle choices were adjusted then it’s likely that such an applicant would ‘otherwise be able to afford a home’.

² For example, if a three-bedroom DMHS property is on the market for £150,000 and the applicant can afford to buy that property, the council will look at what other houses are also available to the applicant on that development site. If a two-bedroom open market property is also available and the applicant does not need three bedrooms then the applicant is unlikely to be successful. This is because the applicant could otherwise obtain a property on the housing site that would meet their affordable housing need. If this scenario arises then the applicant must demonstrate why they need the three-bedroom property and why the two-bedroom property is not suitable.

Monitoring DMSH requires input from numerous skilled officers and takes a considerable amount of time due to the numerous processes involved, ensuring S106 compliance, agreeing sale price, processing applications, assisting sales agents and potential buyers for the first sale and all other sales thereafter. The council have undertaken an assessment of the level of work involved from s106 signing to DMSH sale/ re sale and the cost in officer time. A fee of £250 per DHMS application should be paid along with the DHMS application and evidence.

Setting First Sale Property Values

The open market value of any DMSH property shall be determined between the developer and the council. In the event the open market value of a unit cannot be agreed, the developer will be required to submit two valuations from independent Royal Institute of Chartered Surveyors (RICS) qualified valuers and the open market value shall be the average of the two. Please allow 15 working days for an initial response.

Making DMSH Available

A charge must be applied to the property once registered with land registry and the council must be notified of the sale and sent a copy of the land registry record. Properties for discount market sale should be advertised via the developer's website (in terms of new build DMSH properties), web-based homes sales platforms (such as Right Move, Zoopla, Purple Bricks or other as agreed), Tees Valley Home Finder and the council's websites (in the case of future sales of the DMSH properties). As soon as practically possible a link to the sale shall be provided to the council³ to confirm the date the unit was first marketed.

The Application Process

All applications for DMSH properties must be made by the developer or owner's agent. Once a suitable applicant has been found, the completed application form and associated information should be submitted to the council for approval. Please allow 10 working days for an initial response.

Eligibility Criteria - Financial

DMSH properties are available to assist those who, due to financial reasons, could not otherwise obtain a dwelling on the development site at full market value.

Evidence must be submitted to show that the applicant/s complies with the financial criteria within this policy and set on in the application form.

Key financial information to be submitted is:

- Proof of household income
- Maximum mortgage offer
- Statement from an accredited independent financial advisor
- Any other relevant information i.e. letter from friend/relative providing financial sum, bank statements to show savings and ingoing and outgoings.

AN APPLICANT SHOULD COMPLY WITH ALL THE RELEVANT FINANCIAL CRITERIA NOT JUST ONE.

³ Please email planningpolicy@hartlepool.gov.uk

Proof of household income

An applicant/s should not earn more than 40% of the discount market value of the property. To prove this, typically, the applicant should submit the previous three months pay slips to the developer/owner. If the applicant is not in employment, then the previous three months bank statements showing any income should be provided. Other evidence may be submitted on a case by case basis.

Maximum Mortgage Offer

An applicant/s should provide the developer/owner with a copy of a Maximum Mortgage Offer provided by a lender or financial/mortgage advisor. Where the maximum mortgage offer is above the discount value of the property the statement from an independent financial advisor must clearly set out why a discount is required.

Statement from an independent financial advisor

An applicant/s should provide the developer/owner with a financial statement from a reputable lender or financial/mortgage advisor setting out that the discount is necessary and why. The statement should set out the applicant/s annual income, the level of deposit and any parameters that prevent the applicant from obtaining a mortgage to the open market value (i.e. bad credit rating, high necessary outgoings such as child maintenance). Savings, equity in an existing property, and any financial assistance to be provided (usually from the applicant's family) will also be taken into account to determine the applicant/s obtainable funds.

Eligibility Criteria – Local Connection

Applicants for DMSH need to fulfil certain criteria in relation to affordability and local connection.

The DMSH property must be the sole residence and would have to be the only home of the purchaser (they cannot be purchased as buy to let).

The DMSH properties could not be sold as second homes or holiday lets.

Local Connection

This policy takes a 3-tiered approach to local connection and priority will go to:

- 1) An applicant who
 - I. Has lived in the ward where the development is located as the only or principal home for a continuous period of three years immediately prior to the proposed occupation of a DMSH property, or
 - II. Has a close family connection⁴ with a person currently living in the identified Ward and who has lived there for a continuous period of the past three years.
 - III. Whose last employment was as a member of HM Armed Forces

Or, if such a person is not found (within 3 months of the property first being advertised)

- 2) If no person is found (within the time period set out above) then, a person;
 - i. Who has lived in the administrative area of the council as the only or principal home for a continuous period of six months out of the past twelve months or

⁴ Close family connection means: parent, guardian, child, grandparent, grandchild, or sibling

- three years out of the past five years immediately prior to the proposed occupation of a DMSH property, or
- ii. Who has close family connection with a person living in the administrative area of the council;
 - iii. Whose regular place of work is in the administrative area of the council
 - iv. Who is a Key Worker⁵
 - v. Who can evidence a contract of employment within Hartlepool or to be taken up within the administrative boundary of the council

Or, if such a person is not found (within 6 months of the property first being advertised)

- 3) If no person is found (within the time period set out in 2 above) then, a person;
 - i. Living outside of the administrative area of the council.

Assessing First Sale Applications

With regard to the first sale of a DMSH, the developer will be responsible for assessing the DMSH applications and will submit the necessary paperwork to the council, for written agreement, prior to agreeing the sale. The developer must make it clear to any potential buyer that the process in this SPD and/or associated legal agreement must be followed in any subsequent sale of the unit (re-sale)

Re-Sales

Disposal is a transfer or sale of a freehold or a leasehold or an agreement to make such a transfer or sale. Upon the prospective disposal of a DMSH property, the owner must inform the council in writing of their intention to sell and submit two valuations for the property. The Council's accredited surveyors will review the submitted information and undertake their own assessment, from then a price can be put to the seller. In the event the value of a unit cannot be agreed, the seller will be required to submit two open market valuations from independent Royal Institute of Chartered Surveyors (RICS) qualified valuers and the value shall be the average of the two. The cost of appointing an independent valuers will be met by the seller and the independent valuer's decision is final.

Further to an agreement on the Value, the seller may then market the property for sale with the same percentage discount which the developer agreed with the council on the original development and which is secured within the legal agreement pertaining to that development. Once marketed, particulars of the sale should be sent to the council to ensure the discount has been applied.

The homeowner shall appoint a suitably qualified estate agent to manage the sale and to assess DMSH applications. The appointed estate agent will submit the necessary paperwork to the council, for written agreement, prior to agreeing the sale. To ensure that the accepted applicant is the person who purchases the DMSH, a copy of the mortgage agreement shall be sent to the council upon completion.

⁵ To reflect Government and Economic development intelligence regarding local skills gaps, a Key Worker is defined as someone who is permanently employed in the following professions; nurses and other NHS staff along with Health and social care employees, teachers in schools and in further education or sixth form colleges, police officers and some civilian staff in police forces, prison service and probation service staff, social workers, education psychologists, planners and occupational therapists employed by local authorities, green energy/industrial decarbonisation and net zero employees and whole time junior fire officers and retained fire fighters in some fire and rescue services.

In exceptional circumstances, where a property has been actively marketed, for a period of more than one year, and has been reduced in price by an appropriate sum and for a suitable period of time, it may be possible to sell the unit on the open market. The difference between the full market value and discount market value must be paid to the council, that sum will be considered to be an off-site affordable housing contribution that will be used for the facilitation and delivery of affordable homes in the borough. These parameters must be set out within the legal agreement.

Prioritising Applicants

Applicants are to apply for specific DMSH properties for sale through the developer or owner. This will usually be on a first come, first serve basis, linked to the eligibility criteria above. Where there is more than one eligible applicant with an equal additional priority for the same DMSH property, applications will be ranked by date and time of application.

Legal Implications

The s106 agreement shall provide that the obligations relating to DMSH properties will be protected by a restriction on the proprietorship register at the Land Registry of the registered title of the Discounted Sale property. The Discount is not portable on moving property.

Rental Option

On occasion an owner may need to rent out the property on a temporary basis. This needs to be approved in writing by the council but can be agreed if the property is let to a qualifying person as set out within this policy at an Affordable Rent⁶.

Appeals

The DMSH scheme will be administered in accordance with the provisions of this policy document and the relevant s106 legal agreement, therefore an appeals process is not applicable.

Council Discretion and Monitoring

All information should be submitted to landusepolicy@hartlepool.gov.uk

The council maintains overall discretion with regard to any flexibility when undertaking the DMSH process, any deviation from standard practice must be justified and agreed by the Planning and Development Manager/Land Use Policy Team Leader.

The council will keep a record of purchasers of Discounted Market Sale Housing in a secure location with limited access.

1. Role of the council

- Set out DMV % discount required at planning application stage and ensure this figure is reflected in the S106.

⁶ Affordable Rent – As defined within Annex 2 of the National Planning Policy Framework 2024 or future iterations of such Policy Document – the rent is set in accordance with the Government's rent policy for social rent or affordable rent, or is at least 20% below local market rents (including service charges where applicable)

- Agree to open market value of the property.
- Assess applications and advise on if sale can proceed.
- Maintain a record of sales in a secure location.

2. Role of the developer

- Agree to DMV % discount required at planning application stage and ensure this figure is reflected in the S106.
- Send the council a copy of the land registry record.
- Submit open market value of the DMSH property/s.
- Send a link to the council to confirm the date the unit was first marketed.
- Assess application/s.
- Submit complete and considered to be acceptable applications to the council, for checking prior to the sale being agreed.
- Submit the land registry entry once the buyer/s name/s have been entered on the register.

3. Role of the owner (disposals)

- Obtain a RICS accredited valuation and submit it to the council.
- Appoint an agent to facilitate the sale and assess application/s.
- Send a link to the council to confirm the date the unit was first marketed.
- ensure the agent submits acceptable application/s to the council so the sale can proceed.
- Submit the land registry entry once the buyer/s name/s have been entered on the register.

Discount Market Sales Housing Properties Application Form

Site location/development name.....

Planning reference number.....

1. This form has been produced to ensure sales of Discount Market Sales Housing (DMSH) units on the development conforms with the requirements of the legal agreement attached to the planning permission.
2. The council has agreed with the developer, that on the development the DMSH units will be available at (**.....% discount**) of the market value. These products are aimed at increasing home ownership and are provided to aid those who would otherwise not be able to afford a home on the development site in a bid to get onto the housing ladder.
3. This form sets out requirements which a potential buyer must be able to demonstrate in order to purchase the DMSH unit on the development.
4. The discount sales restriction will be recorded on Proprietorship Register at the Land Registry. Any future sales of this affordable unit will also benefit from the **.....% discount** from the market value at the time. This is in line with the legal agreement/s associated with the Planning Permission for the development.
5. To be eligible for a DMSH units on this housing development the combined gross annual household income must not exceed 40% of the discount market value of the property and the applicant/s must not otherwise be able to be able to afford a home on the development site.
6. Units cannot be purchase as a second home, they must be the applicant`s sole residence. The applicant/s must be the occupier of the property and the only residential property that the applicant/s owns.
7. The developer/owner will inform the council when a sale of one of the DMSH units is completed.
8. This form should be completed by prospective buyers and confirmed by the sales office.
9. Once the sales officer/owner`s agent are satisfied that the applicant is eligible copies of the completed forms should be returned to the council for approval prior to the completion of the sale.

Please note – if you choose to sell your DMSH, you must liaise with HBC Land Use Policy to begin the process, a sale price must be agreed, and only eligible applicants can buy the home.

| SECTION 1 | | |
|--|--|-----|
| Date of Application: | | |
| Planning permission plot number: | | |
| Property address: | | |
| Market Value Price (MVP): | | |
| % discount | | |
| Sum of discount (£) | | |
| Purchase price (...% less MVP): | | |
| Date unit first marketed: | | |
| Applicant(s) Name: | | |
| Applicant(s) Address: | | |
| SECTION 2 | | |
| <p>Eligibility The discounted sale units shall be allocated only to persons in need of affordable housing as identified by the council's most up-to-date eligibility criteria and in accordance with the following allocation priorities:</p> <p>(Close family connection means: parent, guardian, child (including stepchild), grandparent, grandchild, or sibling).</p> | <p>A – a person who; Has lived in the (insert ward.....) of the council's administrative area as the only or principal home for a continuous period of three years immediately prior to the proposed occupation of a DMSH property, or Has a close family connection with a person living in the (insert ward.....) for a continuous period of three years immediately prior to the DMSH proposed occupation, or Whose last employment was as a member of HM Armed Forces</p> <p>Or, if such a person is not found (within 3 months of the property first being advertised).</p> | Y/N |
| | | Y/N |

| | | |
|---|--|-----|
| forms, letter of employment etc. | | |
| <p>Financial Eligibility To be eligible to buy the DMHS property the combined household income should not exceed 40% of the discounted price.</p> <p>Example A property has a discount sales price of £122,500. To be eligible to buy the property the combined household income should not exceed £49,000 (i.e. 40% of the discounted price).</p> | Please provide: | |
| | 1. Proof of combined household income | Y/N |
| | 2. Copy of a maximum mortgage offer | Y/N |
| | 3. A statement from a mortgage/ financial advisor setting out the reasons why the property cannot be purchased without the benefit of the discount | Y/N |
| SECTION 3 | | |
| | Applicant 1 | |
| Applicant Information | Full Name | |
| | Date of Birth | |
| | Contact number | |
| | Current Housing Status (i.e. homeowner, living with family, friends, renting, etc.) | |
| | How long at current address? | |
| | First time buyer? | |
| | Employment Status/Occupation & Employer | |
| | Applicant 2 | |
| | Full Name | |
| | Date of Birth | |
| | How long at current address? | |
| | Contact number | |
| | Relationship with applicant 1 | |
| | Current Housing Status (i.e. | |

| | | |
|--------------------|--|--|
| | homeowner, living with family, friends, renting etc.) | |
| | First time buyer? | |
| | Employment Status/Occupati on & Employer | |
| SECTION 5 | | |
| Declaration | <p>This application for a home is to provide a sole residence for eligible applicants based on the criteria set out above and contained in the S106 Legal Agreement associated with the planning permission for the site. It is not available for investors on a buy-to-let basis. It has been discounted below market price in accordance with the terms of the S106 Legal Agreement.</p> <p>Developer/Owners agent I DECLARE THAT THE INFORMATION PROVIDED IS CORRECT AND COMPLETE AND THAT THE S106 AGREEMENT HAS BEEN ADHEERD TO.</p> <p>COMPANY: JOB TITLE: NAME: SIGNATURE:</p> <p>Applicant/s I DECLARE THAT THE INFORMATION I/WE HAVE GIVEN IS CORRECT AND COMPLETE.</p> <p>I/WE (DELETE AS APPROPRIATE) DECLARE THAT THE INFORMATION I/WE HAVE GIVEN IS CORRECT AND COMPLETE.</p> <p>I/WE FULLY UNDERSTAND THAT IF FALSE INFORMATION IS GIVEN THIS MAY RESULT IN THIS APPLICATION BEING CANCELLED OR COURT PROCEEDINGS BEING TAKEN.</p> <p>I/WE ALSO GIVE AUTHORISATION FOR THE COUNCIL TO PASS MY/OUR DETAILS ON TO PARTNER ORGANISATIONS WHERE NECESSARY SUCH AS THE DEVELOPER.</p> <p>I/WE CONSENT TO RECORDS BEING CHECKED IN ORDER TO PROGRESS THIS</p> | |

| | |
|--|--|
| | <p>REQUEST SUCH AS THE ELECTORAL REGISTER.</p> <p>Names(s)</p> <p>Signature(s)</p> <p>Date</p> |
|--|--|