

Land at Wellcross Farm, Broadbridge Heath

Affordable Housing Scheme & Resale Covenant Scheme

On 22nd January 2021, a Unilateral Undertaking was completed under Section 106 of the Town and Country Planning Act 1990 relating to land at Wellcross Farm, Broadbridge Heath, West Sussex (Ref DC/19/1897). This document is submitted to comply with Schedule 2, Part 1 and comprises an Affordable Housing Scheme and Resale Covenant Scheme for all phases of land at Wellcross Farm.

1. Affordable Housing Scheme

This document should be read in conjunction with the below plans approved with Reserved Matters applications for Phase 1 (Ref DC/22/1503), and Phases 2 & 3 (Ref DC/24/0205) of the development.

- 2771-URB-BH-XX-DR-A-208910-P01c - Phasing Plan
- 2771-URB-B13-ZZ-DR-A-208160 P00a - Affordable Allocation, Location Plan Block 13
- 2771-URB-B14-ZZ-DR-A-208160 P00a - Affordable Allocation, Location Plan Block 14
- 2771-URB-B5-ZZ-DR-A-208160 P00a - Affordable Allocation, Location Plan, Block 5
- 2771-URB-B6-ZZ-DR-A-208160 P00a - Affordable Allocation, Location Plan, Block 6
- 2771-URB-B7-ZZ-DR-A-208160 P00a - Affordable Allocation, Location Plan, Block 7

Type, Tenure and Size

The provision of affordable housing, as approved, comprises 20% of the total Extra Care Dwellings as affordable housing in accordance with the requirements of Schedule 2, Part 1. This is formed of 28 affordable units and will comprise 21 units of discount market rent and 7 units of shared ownership. On a phased basis this will consist of the following.

Phase 1

- 9 affordable units comprising:
 - 7x discount market rent (80% of market value)
 - 2x shared ownership (75% of market value)

Phase 2

- 11 affordable units comprising:
 - 8x discount market rent (80% of market value)
 - 3x shared ownership (75% of market value)

Phase 3

- 8 affordable units comprising:
 - 6x discount market rent (80% of market value)
 - 2x shared ownership (75% of market value)

Construction programme

Phase 1 will start on site in July 2026 with an anticipated completion date of November 2028 for that phase in entirety, including all affordable units within that phase. The first occupation of Phase 1 is forecast for February 2029.

Phase 2 will subsequently start on site in April 2029 with an anticipated completion date of August 2030 for that phase in entirety, including all affordable units within that phase. The first occupation of Phase 2 is forecast for November 2030.

Finally, Phase 3 will start on site in August 2031 with an anticipated completion date of December 2032 for that phase in entirety, including all affordable units within that phase. The first occupation of Phase 3 is forecast for March 2033.

Disposal Mechanism & Local Connection

Schedule 2, Part 1, Paragraph 4.5 requires information to be submitted on the mechanism by which any disposal after the first disposal will be marketed, including how preference may be given to Qualifying Persons with a Housing Need who can demonstrate a Local Connection (Parish). This is defined as “a person who:

- (a) *currently lives or has lived within any of the Local Area Parishes and has done so for 6 out of the last 12 months or 3 out of the last 5 years; or*
- (b) *has immediate family (parent, sibling, child or adoptive parent) who are currently living in any of the Local Area Parishes and who have done so for at least 5 years; or*
- (c) *(C) has a permanent contract of employment in any of the Local Area Parishes; or*
- (d) *(d) Is a member of the armed forces or former service personnel (within 5 years of their discharge) or a bereaved spouse or civil partner of a member of the armed forces leaving services family accommodation following the death of their spouse or partner, or a serving or former member of the reserve forces who needs to move because of a serious injury, medical condition or disability sustained as a result of such membership; or*

(e) (e) has other significant connections to any of the Local Area Parishes such that in the reasonable opinion of the District Council, they should be eligible for Affordable Housing within any of the Local Area Parishes”

Preference will be given to those with a Local Connection (Parish) in accordance with the prior to first disposal. Following first disposal, all subsequent disposals will be marketed in line with Inspired Villages marketing strategy for the wider site and will be clearly marked as either Discount Market Sale, or Shared Ownership, with exclusions which may apply in relation to future disposal (as per Schedule 4), including the requirement to demonstrate a Housing Need, and the Qualifying Persons and Care requirements within the Unilateral Undertaking.

In addition to the above, Affordable Housing Units will be marketed in accordance with an agreed Affordable Housing Marketing Strategy to ensure that the homes are made available to households with an identified Housing Need. During the agreed Marketing Period, priority will be given in the first instance to applicants with a Local Connection to the Parish and thereafter to those with a Local Connection to the wider District, as defined within the Section 106 Agreement. The units will be promoted through appropriate local marketing channels and in consultation with the Local Authority to maximise awareness amongst eligible local residents.

The Affordable Housing Units will remain subject to the agreed Resale Covenant Scheme to ensure that the homes continue to provide affordable housing opportunities for local people in perpetuity. Future occupation and any onward sale of the properties will therefore be restricted to persons who meet the relevant Housing Need and Local Connection criteria, unless otherwise agreed in writing by the District Council.

The Discount Market Sale units will be marketed in accordance with the wider Inspired Villages marketing strategy for the site and will be clearly identified within all marketing material as affordable housing products subject to eligibility criteria and ongoing resale restrictions. During the initial 3 month marketing period, priority will be given to Qualifying Persons with a Local Connection (District), with the units promoted through appropriate local marketing channels, local authority liaison, estate agency platforms and targeted communications to maximise awareness amongst eligible purchasers.

Should the units remain unsold following this period, they will subsequently be marketed to any Qualifying Person able to demonstrable an identified Housing Need. All Discount Market Sale units will continue to be subject to the agreed resale covenant provisions to ensure the homes remain available as affordable housing in perpetuity.

Following the expiry of the defined Marketing Period the affordable units may then be offered to Qualifying Persons as Discount Market Units, defined as a discounted figure comprising 80% of Open Market Value (to be agreed between the owners and the District Council and assessed in general accordance with the Appraisal and Valuation Manual of the RICS as amended from time to time) as per Schedule 2, Paragraph 10 if not yet sold / let. Where any affordable housing units are to be provided as Discount Market Units, pursuant to Paragraph 10, they will subsequently be offered to Qualifying Persons with a Local Connection (District) for a period of 3 months, as set out in Schedule 2, Paragraph 11. Any units to be sold as a Discount Market Sale unit, will be subject to the resale covenant scheme set out below.

2. Resale Covenant Scheme

The resale covenant scheme is defined in the Unilateral Undertaking as *“a scheme approved in writing by the District Council which:*

- i) Restricts the sale price of the Discounted Market Units and the terms upon which such occupation and/or sale or transfer of such Discounted Market Units may take place; and*
- ii) Prescribes the terms on which an individual owner’s interest in a Shared Ownership Unit may be disposed of*

Within the parameters set out in the Second Schedule such scheme to be in the substantial form set out in Schedule 4 with such modifications and amendments as may be agreed in writing by the District Council.”

No amendments are proposed to the Resale Covenant Scheme set out at Schedule 4 of the Unilateral Undertaking. All subsequent disposals will be undertaken in accordance with the process set out.

In accordance with the provisions of Schedule 4, the Resale Covenant Scheme will apply to all Discount Market Sale units and will provide the process for any subsequent disposal/sale of those properties. This will include, amongst other requirements, obtaining the District Council’s approval for any onward sale together with an updated valuation of the property undertaken in accordance with the agreed valuation methodology. The purpose of the Resale Covenant Scheme is to ensure that the Discount Market Sale units remain available as affordable housing products in perpetuity and continue to benefit households with an identified Housing Need.



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