

PLANNING STATEMENT

Development of Retirement Living Housing



SITE AT BERNESLAI CLOSE, BARNESLEY, S70 2HL
NOVEMBER 2017



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APPENDIX F: A Better Life: Private Sheltered Housing and Independent Living for Older People by The Opinion Research Business.

APPENDIX G: Local Area Economic Impact Assessment by the Institute of Public Care (March 2014)



This Planning Statement has been prepared by The Planning Bureau Ltd, on behalf of McCarthy & Stone (The Applicant), in support of a full (detailed) planning application for the erection of specialist Retirement Living accommodation for the elderly comprising 24 x 1 bed and 19 x 2 bed apartments, at the site of the former council offices and the refurbishment of the red brick building into 9 x 1 bed and 2 x 2 bed apartment at Berneslai Close, Barnsley.

The purpose of this Planning Statement is to appraise the development proposals against the relevant statutory development plan policies and material considerations which relate to the provision of Retirement Living apartments for older people at the application site and provide an indication of how the retained building can be converted into open market apartments.

The proposed Retirement Living development will ensure that residents maintain their independence via a range of communal facilities and a House Manager, allowing them to remain in their own home as frailty increases through later life. This is a very specialised form of accommodation that is currently limited within Barnsley, the development of which promotes downsizing and encourages the more efficient use of existing housing stock.

The proposal provides the opportunity to achieve a high quality development that would positively contribute to meeting demonstrable local housing needs in accordance with the National Planning Policy Framework (NPPF) (March 2012), National Planning Practice Guidance (NPPG), the Barnsley Strategic Housing Market Assessment (November 2014) and the Barnsley Housing Strategy 2014-2033.

In short, this scheme provides numerous wide ranging social and planning benefits, both for potential residents and the community as a whole. These include:

Sustainability Benefits

- *The provision of much-needed accommodation for older people that helps address the demographic imperative of an ageing population and a housing stock that is ill-equipped to deal with its needs.*
- *An accessible location and form of development that will lead to less reliance on the private motorcar.*
- *A development that serves to underpin local facilities, including the retail functions of the shops close to the site.*
- *A land use, which is entirely passive and a “good neighbour”.*
- *A building that provides substantial energy efficiency advantages over most open market schemes.*

Balanced View of Policy and Other Material Considerations

- *Specialised housing for older people provides significant planning and social benefits.*
- *Sustainable form of development.*
- *Optimises use of scarce residential land.*
- *Reduced demand on public sector resources and health services. Residents manage better and spend fewer nights in hospital, reducing the impact on NHS resources.*
- *Most residents have family and friends in the locality and are able to remain an important part of the local community.*
- *Increases availability of much needed family housing in areas of shortage boosting the supply in the local housing market.*
- *Helps underpin local facilities.*



This proposal represents an ideal opportunity to redevelop a previously developed site in Barnsley, in accordance with the Government's housing and sustainable development policies. The former office block has not been used as offices for a since 2011 and is currently being utilised by the Council as storage. The proposed redevelopment of the site would provide for much needed specialised accommodation for older people within a central location, whilst also freeing up existing under-occupied housing stock.

This specialised form of residential accommodation provides older people with a better housing choice, and provides residents with safety, security and companionship whilst removing the heavy burden of property maintenance. Therefore it reduces the anxieties experienced by many older people living in accommodation that does not best suit their needs.

This proposal is located in an accessible location in very close proximity to the Barnsley Town Centre and within easy reach of the shops, public transport facilities and other essential services located therein, which all benefit residents in maintaining an independent lifestyle. This specialised form of housing generates extremely low levels of traffic. Additionally the convenience of the location close to public transport opportunities would further reduce the need for car use, not least because purchasers of such accommodation generally no longer need or wish to have the 'burden' of car ownership (please see the Transport Statement submitted alongside this planning application).

The proposed development successfully achieves a balance between the potentially competing objectives of development and the environment, and thereby satisfies the goal of "sustainability".

This proposal will:

- Contribute to meeting identified housing needs and accord with national planning guidance in relation to sustainable development;
- Accord with the relevant and material provisions of the development plan including its housing objectives;
- Achieve a high quality design that will enhance both the character and appearance of the local area; and
- Respond positively to the character of the local area and the street scene.



Above: Example of McCarthy & Stone development at Monkseaton



McCarthy & Stone was established in 1963. During the past 40 years the Company has specialised in the design, construction and management of Retirement Living housing (also known as sheltered accommodation) for sale to older people, and has developed a wealth of experience in this particular sector of the housing market. Extensive research both at pre and post-occupation has been carried out by the Company, which has led to product and service development.

This background has resulted in McCarthy & Stone being widely recognised as the market leader in the provision of Retirement Living housing for sale to older people. To date more than 50,000 specialised dwellings for older people have been built or are in the course of construction at over 1,000 McCarthy & Stone development sites throughout the United Kingdom. As a result, McCarthy & Stone has considerable experience of successfully developing a wide variety of sites including town centre locations, infill sites, sites within conservation areas and those adjacent to Listed Buildings.

McCarthy and Stone's ethos is that later life can be more fulfilling. Through its developments and services, it helps older people enjoy their lives in peace, comfort and security. In addition to new developments, the Company provides its own care, support and management services. This ensures a continuing relationship and commitment to all of its residents.

McCarthy & Stone continues to win the highest awards possible for customer satisfaction. Independent surveys by the House Builders Federation (HBF) show that it is the only retirement house builder to achieve a double five star rating for customer service, and it has done so for twelve consecutive years.



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Nature and Concept of Retirement Living Housing

Retirement Living housing is a proven option for older people who wish to move into accommodation that provides comfort, security and the ability to manage independently to a greater extent. It enables older people to remain living in the community and out of institutions whilst enjoying peace of mind and receiving the care and support that they need.

All McCarthy & Stone developments are specifically designed to provide specialised housing accommodation for older people, with communal facilities and specific features within the apartments tailored to meet the particular needs of older people. Since 2010 McCarthy and Stone has managed its own developments and a House Manager is based on-site, supported by the Company's management services team. This allows for the maintenance and management of the development and its grounds to be kept in line with best practice and all legal lease management requirements that apply.

While anyone may purchase an apartment, they are sold on the basis of a 999 year lease requiring the accommodation, with the exception of the House Manager's office accommodation, to be occupied by persons over 60 years. In the case of a couple, that part of the lease shall be satisfied where one of the occupants is over the age of 60 years and the other is over the age of 55 years.

This is a reasonable and caring approach to the limitation on the occupancy of retirement living housing in that it recognises and allows for those exceptional cases where a spouse, who is in need of special accommodation, has a younger partner.



Above: Example of a guest suite and an example of organised activities, which are a feature of a McCarthy and Stone development



3

Nature and Concept of Retirement Living Housing

Such occurrences are, in any event, found to be extremely rare as between 60-70% of occupants are aged 78 years or over with about 30% aged 80 years or above. The vast majority of McCarthy & Stone residents (some 85-90%) are widowed or single, with 75% of apartments comprising of single, female households.

The accommodation includes a range of communal facilities that are also tailored to meet the needs of the residents, including:

- **residents' lounge;** this represents the heart of the community and is centrally located close to activity either on or off site (e.g. the car park). It is decorated to the highest standards and is designed to have the atmosphere of a high quality hotel lobby;
- **internal refuse room;** this allows residents to dispose of waste without leaving the building, and avoids the need for unsightly bin stores outside the property;
- **lift;** between floors facilitating ease of movement;
- **battery car store in the building;**
- **secure entrance lobby with CCTV link to individual apartments;**
- **emergency help line;** available within each residents' apartment and communal areas to summon assistance in the event of an emergency;



- **guest suite;** comprising an en-suite twin bedroom for family and friends to sleep over; and
- **gardens;** are an important element in the design of Retirement Living accommodation and will comprise well landscaped gardens, and with sitting out areas for the residents' enjoyment.



Above: Typical McCarthy and Stone apartments bedroom and lounge.

4 Planning and Social Benefits of Retirement Living Housing for Older People

Recently a growing number of reports have been published that promote the strategic need to provide more and better housing for those in later life as well as the benefits that specialist accommodation for older persons delivers. These reports have been published by a variety of organisations including the private sector, academic institutions, charities and numerous Government bodies at national and local level. The following seven reports are of particular relevance and an executive summary for each is appended to this document:

- *Ready for Ageing?* compiled by the House of Lords Select Committee on Public Service and Demographic Change (Appendix A) - The report warns that the Government and our society are woefully under-prepared for ageing. The Committee says that longer lives can be a great benefit, but there has been a collective failure to address the implications and without urgent action this great boom could turn into a series of miserable crises. The report covers a broad range of policy areas, providing a comprehensive analysis of the potential impact of an ageing population on public services.

The report states that *“the housing market is delivering much less specialist housing for older people than is needed. Central and local government, housing associations and house builders need urgently to plan how to ensure that the housing needs of the older population are better addressed and to give as much priority to promoting an adequate market and social housing for older people as is given to housing for younger people”*.

Additionally, the report highlights that *“there are just 106,000 units of specialist housing for home ownership and 400,000 units for rent in the*

UK as a whole. Build rates are lower now than in the 1980s. In 2010, just 6,000 units for rent and 1,000 for ownership were built, whereas in 1989, 17,500 units for rent were built as well as 13,000 for ownership”.

<http://www.parliament.uk/business/committees/committees-a-z/lords-select/public-services-committee/report-ready-for-ageing/>

- *Top of the Ladder* compiled by Demos (Appendix B) - This report uses original quantitative research to investigate older people's housing preferences, and the likely impact of giving them greater choice. It estimates that if all those interested in buying retirement property were able to do so, 3.5 million older people would be able to move, freeing up 3.29 million properties. Apart from these gains, retirement housing has a very beneficial effect on older people's health, wellbeing and social networks, and could save health and care services considerable resources.

<http://www.demos.co.uk/projects/topoftheladder>

- *Identifying the Health Gain from Retirement Housing* by the Institute of Public Care (Appendix C) - The paper highlights that increased companionship and security, better access to care and warmer, more accessible accommodation through the development of good quality retirement housing could reduce the need for health care expenditure.

<http://ipc.brookes.ac.uk/publications/index.php?absid=71>

- *Creating Housing Choices for an Ageing Population* by Shelter (Appendix D) - This report takes a detailed look at the current state of housing for the



4 Planning and Social Benefits of Retirement Living Housing for Older People

older people's market and considers whether there is a wide choice of housing for an ageing population and if there is any scope to stimulate a greater supply.

http://england.shelter.org.uk/professional_resources/policy_and_research/policy_library/policy_library_folder/a_better_fit_creating_housing_choices_for_an_ageing_population

- *Housing Markets and Independence in Old Age: Expanding the Opportunities* by Professor Michael Ball of Reading University (Appendix E) - This report highlights a number of simple policy changes needed to stimulate the delivery of owner occupied retirement housing.

<http://www.reading.ac.uk/news-and-events/releases/PR364822.aspx>

- *A Better Life: Private Sheltered Housing and Independent Living for Older People* by The Opinion Research Business (ORB) (Appendix F) - This sets out the findings of one of the largest studies of sheltered housing in the UK.

<http://www.mccarthyandstone.co.uk/documents/research%20and%20policy/orb2.pdf>

- *Local Area Economic Impact Assessment* by the Institute of Public Care (March 2014). This report (Appendix G) takes a detailed look at the economic benefits of sheltered housing developments on the local economy.

<http://ipc.brookes.ac.uk/publications/pdf>

[Final McCarthy and Stone EIA report - March 2014.pdf](#)

These reports detail that Retirement Living housing provides a valuable form of specialised accommodation that meets a specific housing need. In so doing, it gives rise to significant planning and social benefits that realise other national and local planning objectives. Insofar as local and wider planning benefits are concerned, Retirement Living housing contributes the following:

Community

- Freeing up housing: Specialist housing helps to free up much-needed and under-occupied family homes in the local area, thereby making better use of existing housing stock. An average scheme of 45 apartments frees up housing **worth nearly £7.5 million**.
- Community spending: McCarthy & Stone's developments contribute to the vitality and viability of the local area as its residents typically do their shopping within a one mile radius. 80% use local shops almost daily or often and over 40% use the local library or post office frequently. Residents occupying an average scheme of 45 apartments are estimated to have a 'community spend' of more than **£6 million** over a development lifetime period.

Economic benefits

- Investment during construction: An average development represents an investment of around **£3.6 million** into the local economy.
- Local jobs: Around 60 local companies are employed during construction, thus supporting local jobs. Additional job opportunities are created when the scheme opens.
- New Homes Bonus: Through this Government initiative to encourage



4 Planning and Social Benefits of Retirement Living Housing for Older People

new development, each local authority will receive around **£378,000** per every 45 new homes (McCarthy and Stone's typical development size) that are built in the local area. This is money it can spend as it deems fit.

Improved health

- Streamlined health and social care provision: Residents in specialist housing have fewer visits to local health professionals and find it easier to return home after stays in hospital.
- Older people account for 55% of GP appointments, 68% of outpatient appointments and 77% of inpatient bed stays. As well as achieving better outcomes, specialist housing reduces demand for these acute health and care services by supporting people to live independently and avoiding crisis intervention. Research shows that each year a resident postpones moving into public care by living in market accommodation, the local authority saves on average £30,000.
- Health and social care provision can be streamlined within specialist housing. Visiting health professionals including doctors, nurses, chiropodists and so forth can see several residents during one visit, which is a more efficient use of public resources.

Increased well-being

- Increased wellbeing: 64% of McCarthy & Stone's residents said their health and well-being had improved since moving into the scheme.
- A higher quality of life: 92% said they were very happy or contented.
- Increased independence: 83% believed they maintained their independence for longer.

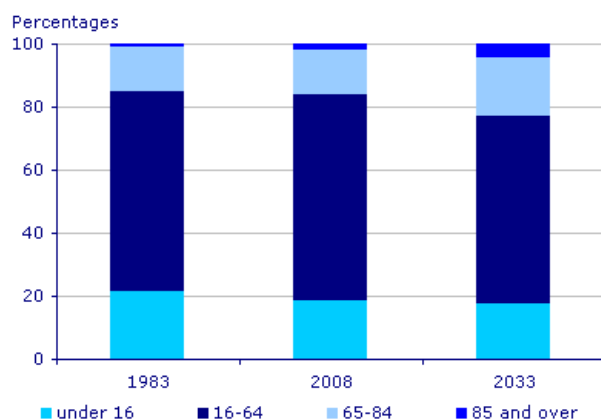
Retirement Living housing provides purpose-built, specifically designed, small units of accommodation for local older people. Insofar as local and wider planning benefits are concerned, Retirement Living housing:

- addresses an acknowledged and specific housing need;
- addresses an existing housing "mismatch", by releasing presently under-occupied housing and thus plays an important role in the recycling of stock in general;
- has a knock-on effect in terms of the recycling of the whole housing chain – Retirement Living housing being at the "back-end" of the chain;
- optimises the use of residential development land ; and
- provides energy efficient construction and living, through shared wall construction, cross-flow ventilation and shared heating facilities



The proposed redevelopment of the site for Retirement Living housing for older people provides a significant opportunity to contribute towards meeting the current and projected requirements for special needs accommodation for older people in Barnsley and the UK generally. The following table and supporting text from mid-year population estimates, Office for National Statistics, shows the estimated increase in older people.

Ageing Fastest Increase in the 'oldest old'



Above: Population by age, UK, 1983, 2008 and 2033

"The population of the UK is ageing. Over the last 25 years the percentage of the population aged 65 and over increased from 15 per cent in 1983 to 16 per cent in 2008, an increase of 1.5 million people in this age group [in real terms]. Over the same period, the percentage of the population aged 16 and under decreased from 21 per cent to 19 per cent. This trend is projected to continue. By 2033, 23 per cent of the population will be aged 65 and over compared to 18 per cent aged 16 or younger.

The fastest population increase has been in the number of those aged 85 and over, the 'oldest old'. In 1983, there were just over 600,000 people in the UK aged 85 and over. Since then the numbers have more than doubled reaching 1.3 million in 2008. By 2033 the number of people aged 85 and over is projected to more than double again to reach 3.2 million, and to account for 5 per cent of the total population" (Mid-year population estimates, Office for National Statistics).

Data from the 2011 Census for the Barnsley Central ward shows that 1,632 people (14.7%) were of a pensionable age; out of this 691 people (6.2%) were aged 75 and over. This compares to the England/Barnsley Borough figures of 16.3 / 17.3% of the total population over 65 years old and 7.7 / 7.7% over 75 years old respectively.

The interim 2011 - based Sub-National Population Projections, predicts that by the year 2021, 19.6% (48,763) of people in Barnsley Borough will be of retirement age, with 9.1% (22,774) of people over 75 years old. This compares to the England / South Yorkshire figure of 18.7 / 18.5% of the total population over 65 years old and 9.1 / 8.9% over 75 years old. Reviewing this data against the 2011 Census reveals that Barnsley Borough's population of over 65 year olds is predicted to increase by 8,753 people and the over 75 year olds by 4,844 people within 20 years.

Census data also shows that out of all households where the Household Reference Person is aged 65 and over in Barnsley Central Ward, 63.3% were owner occupied in tenure, being in excess of the England / Barnsley Borough averages of 74.1 / 65.6%. Consequently, the provision of private Retirement Living apartments for older people will widen the housing choices for older persons from the area, and allow them to remain as property owners.



The Barnsley Housing Market Assessment (November 2014) acknowledges that *'Addressing the accommodation requirements of older people is going to become a major strategic challenge for the Council, with the number of residents aged 65 or over expected to increase over the next decade.'*

The evidence presented by the Council in this document states *'the majority of older people (70.2%) want to continue to live in their current home with support when needed. A further 19.2% are considering renting sheltered accommodation, 14.1% renting extra-care housing and 13.2% buying on the open market.'* and it is therefore recognised by the Council that there is *'the need to diversity older persons' provision within the Barnsley MB area.'*

The Strategy introduces a series of new interventions and approaches (inter alia): *'Quality of housing experience and support, through supporting the most vulnerable households to prevent and providing a better deal for older people, with greater choice and support to live independently.'* The document identifies that it *'the Government has prioritised the provision of housing and support to help older, vulnerable or disadvantaged people'*.

The SMHA Core Output 2: Past and current housing market trends; balance between supply and demand; key drivers identifies that in terms of owner occupiers in Barnsley 37.9% are older (60 or over). Analysis of the household figures reveals that *'houses remain the most popular choice of most households (except for singles over 60)'* with *'One quarter (24.6%) of older single people expect to move into flats'*. Specifically addressing the need for older persons' accommodation the document states *'A major strategic challenge for the Council is to ensure a range of appropriate housing provision, adaptation and support for the*

area's growing older population. The number of people across the Barnsley MB area aged 65 or over is projected to increase by 16.9% from 55,166 in 2011 to 64,483 by 2021.'

The Council identifies the need to promote a variety of older persons' accommodation as a means of freeing up larger family accommodation. The document recognises the increase in the proportion of older people has policy implications resulting in a greater need for appropriate housing and support as people age.

Crucially the document acknowledges that *'the range of housing options available to older people needs to be diversified, for instance through the development of open market housing marketed at older people and the development of Extra Care accommodation and co-housing'*.

Barnsley Housing Strategy 2014-2033

One of the main strategic objectives is to *'support younger, older and vulnerable people to live independently'*. The Council expect this to be achieved through the Delivery Plan by (inter alia): *'improve the range and options of supported accommodation'* and *'provide more choice and options to help vulnerable and older people live independently in their homes'*

The Strategy identifies a housing shortfall in all sizes of accommodation however specifies that *'future development will need to address shortfalls with more smaller and larger homes.'*



- *2009 to 2014: 4,418 new homes were built*
- *2014-2033: 20,000 to 25,000 new homes need building.'*

The Strategy sets out how new development will be created through '*housing development in the future will be based on boosting the supply of new homes in the right locations, together with completing the regeneration and renewal of the existing urban areas*'. Additionally it states '*new developments will need to be in keeping with the character of the area, while contributing an appropriate supply of good quality , energy efficient homes*'.

In order to increase housing supply the Council will also '*prioritise investment in non-green belt sites and explore the benefits of releasing land and property that the council and other public bodies own*'.

The Strategy identifies an intention to create new supported housing '*by providing the right type of buildings and support services we aim to enable everyone to live in a home that is suitable for them at different stages of their life. Within the first four-year delivery plan we are undertaking a detailed needs assessment to help shape where our priorities lie for supported accommodation and all user groups*'.

The provision of Retirement Living accommodation for older people will help to widen the housing choices for older persons from the Barnsley area and allow them to remain as property owners.



The Site

The site measures approximately 0.42 hectares (1.04 acres) and is located in Barnsley Town Centre. The site comprises disused former Council office buildings and an area of hard standing (mainly car parking). The built form is three linked building, the main building was constructed in the 1930s with modern additions to the rear. The Edwardian former hospital building will be retained and sensitively converted into residential apartments. The site is irregular in shape but generally flat. The site is a suitable location for Retirement Living apartments, located approximately 400 metres from the defined Shopping Area of Barnsley Town Centre, which includes numerous shops, cafes and restaurants etc. to meet the residents' everyday needs.

Access is taken from Berneslai Close, which forms the site's southern boundary. The site is bound by an established residential area to the north and west. The retained building is at the east of the site and access will be taken from Berneslai Close. Existing mews properties on Berneslai Close face the eastern elevation of the retained building and the Retirement Living scheme boundary. The southern elevation of the building faces the small area of parkland.

Locational Characteristics

In locational terms, the site is easily accessible via public transport with bus stops located on Church Lane and Church Street a few minutes walk from the development. These stops provide regular services to Barnsley Interchange, Kexborough and Woolley Grange. Barnsley train station is approximately 500m south-east of the site, providing regular services to Leeds, Nottingham, Sheffield and Huddersfield.

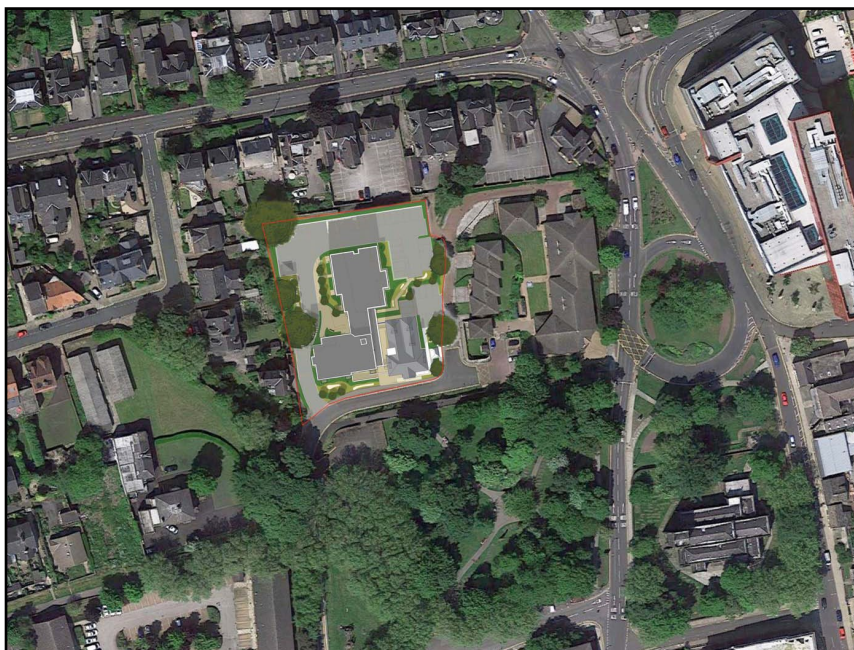
In selecting sites for older persons' accommodation, McCarthy & Stone take full account of the locational criteria recommended in the Joint Advisory Note of the National House Builders' Federation and the National Housing and Town Planning Council entitled - 'Sheltered Housing for Sale' (2nd Edition - 1988).

The five locational criteria identified are:-

- (i) Topography
- (ii) Environment (including safety and security)
- (iii) Mobility
- (iv) Services
- (v) Community Facilities



The NHBF/NHTPC Advisory Note acknowledges that the ideal site for sheltered housing is difficult to find. However, the site that is the subject of this application is eminently suited to a use such as Retirement Living housing and is well situated to serve the needs of local elderly persons who will occupy such a development.



Above: Aerial photograph with the site marked in red

Planning History

There is no relevant planning history as the site has been used by Barnsley Borough Council as offices and latterly as storage.



Above: Existing office building and building to be retained (on left)

Proposed Development

The development is proposed via the submission of a detailed (full) planning application. The application is accompanied by a full suite of application drawings and images which show in detail how the scheme will look, and demonstrate that it can be satisfactorily accommodated on site.

The application proposes the erection of specialist Retirement Living accommodation comprising 24 x 1 bed and 19 x 2 bed apartments for sale to older people and an indication of the refurbishment of the red brick building into 11 apartments (to be developed by a separate developer for sale on the open market). The Retirement Living development will feature communal facilities such as a residents' lounge, CCTV entry system, and Careline alarm facility. As detailed in Chapter 3, McCarthy & Stone's management company maintain the grounds and fabric of all its developments following construction, thus safeguarding the interests of the owners and the local community.

The submitted Site Layout plan demonstrates that the proposed development can be satisfactorily accommodated on site, together with the necessary site infrastructure including internal highways and pedestrian footways, appropriate landscaping and amenity space and car parking provision.



Above: Proposed elevations, streetscape from Berneslai Close



Local Context

Planning and Compulsory Purchase Act 2004 (“The Act”) establishes the legislative background for town planning in England and Wales. Section 38(6) of The Act requires that proposals are determined in accordance with the Development Plan, unless material considerations indicate otherwise.

The statutory Development Plan for Barnsley currently comprises the following adopted Development Plan Documents (DPDs):

- Barnsley Core Strategy (adopted September 2011); and
- Remaining ‘saved’ policies of the Barnsley Unitary Development Plan (UDP) (adopted December 2000).

The remaining saved UDP policies will ultimately be replaced by the emerging Local Plan. Barnsley MBC submitted its publication draft Local Plan to the Secretary of State and the Examination in Public took place in October 2017. Adoption of the Local Plan is expected in Spring 2018.

Development Plan

A review of the adopted UDP Proposals Map, which shows land allocations saved through the Barnsley UDP (December 2000), confirms the site is not allocated for a specific use but falls within the Northern Office/Education/Civic Area. The UDP plan has the site abutting the Victoria Road Conservation Area, however the Conservation Area has been extended since 2000 to include the site.

Core Strategy

The Core Strategy identifies a number of Strategic Objectives setting out how the Council intends to achieve its vision and resolve the issues that the Borough faces. The following objective is of relevance:

Objective 2: To improve access, movement and connectivity with sustainable travel by—(inter alia): *‘Reducing the reliance on the private car and encouraging walking and cycling and ensuring new developments reduce the need for car parking provision to a minimum.’*

Objective 3: To secure safe, healthy and inclusive communities and promote wellbeing by— (inter alia): *‘making sure development takes places in settlements, and helping to create places where people want to live with convenient access to good quality local services’* together with *‘encouraging the provision of ‘Lifetime Homes’ which meet peoples needs throughout their life’.*

Objective 4: To make efficient use of land and infrastructure by— (inter alia): *‘utilising previously developed land and re-using existing buildings where possible in sustainable locations.’*

Objective 6: To ensure all new development is sustainably designed and built to the highest standards by— (inter alia): *‘embracing the principles of sustainable design, insisting development contributes to and enhances local distinctiveness, and protecting and improving the heritage of the borough’.*

Objective 7: To deliver a sufficient supply of housing to provide balanced mixed communities and support economic growth by— (inter alia): *‘giving priority to building housing on previously developed land where possible, providing*



a range of housing types and tenure to meet local need and widen housing choice and creating residential environments where people are proud to live and a sense of community spirit can be created.'

The Core Strategy identifies strategic policies which will work towards achieving its objectives. The following strategic policies are relevant to this application:

CSP 29—Design sets out the overarching design principles for the borough to ensure that development is appropriate to its context and states that *'high quality development will be expected, that respects, takes advantage of and enhances the distinctive features of Barnsley'*. The policy states that within Barnsley Town Centre *'heritage, townscape and landscape character including the scale, layout, building styles and materials of the built form'* should be respected.

CSP 30—The Historic Environment states *'development which affects the historic environment and Barnsley's heritage assets and their settings will be expected to protect and improve the character and/or appearance of Conservation Areas and Listed Buildings.'*

CSP15—Affordable Housing expects development of 15 or more dwellings to provide affordable housing. Within Barnsley Town Centre 15% provision is expected. The policy states that *'these percentages will be sought unless it can be demonstrated through a viability assessment that the required figure would render the scheme unviable.'*

CSP 14—Housing Mix and Efficient Use of Land recognises the *'priority will be given to the development of previously development land and we will seek to achieve between 55% and 60% of homes to be build on previously developed land'*. The policy notes that *'various housing types capable of accommodating a range of needs*

are required across the borough such as family housing and older persons accommodation.' Furthermore, *'the principle of creating homes that are capable of meeting long term needs of residents or can be adapted to meet these needs (often referred to as ('Lifetime Homes')) will be supported'*.

CSP 25—New Development and Sustainable Travel states *'new development will be expected to:*

- *Be located and designed to reduce the need to travel, be accessible to public transport and meet the needs of pedestrians and cyclists*
- *Provide at least the minimum level of parking for cycles, motorbikes, scooters, mopeds and disabled people, and should not provide more than the maximum number of car parking spaces set out in the Supplementary Planning Document*
- *Provide a transport statement or assessment and travel plan statement or a travel plan.*

CSP 26—New Development and Highway Improvement states *'new development will be expected to be designed and built to provide safe, secure and convenient access for all road users'*.

CSP 3—Sustainable Drainage Systems will be expected on all developments.

CSP 5—Including Renewable Energy in Developments states that *'all development (either new build or conversion) of 10 or more dwellings will be expected to incorporate decentralised, renewable or low carbon energy sources and other appropriate design measures sufficient to reduce the development's carbon*



dioxide emissions by at least 20% subject to such measures being practicable and not unacceptably prejudicing the viability of the development.' Furthermore the policy states *'where it is not appropriate to incorporate such provision within the development, an off site scheme, or contribution to such may be acceptable.'*

CSP 42—Infrastructure and Planning Obligations states that *'development must be supported by appropriate physical, social and economic infrastructure and must contribute as necessary to meet all on and off site infrastructure requirements to enable development to take place satisfactorily.'*

Saved Policies of the UDP

The Barnsley UDP was adopted in December 2000. A number of the UDP policies were 'saved' by a Direction from the Secretary of State in September 2007 although many were subsequently deleted or replaced upon adoption of the Barnsley Core Strategy in September 2011.

Whilst the saved policies remain part of the development plan, the UDP was prepared under the previous system and therefore does not benefit from any transitional arrangements detailed in the NPPF. Therefore the UDP will carry very little weight in the determination of applications where its policies are inconsistent with the NPPF.

The following saved UDP policies are considered most relevant to the proposed development:

Policy TC20—High standards of design and materials will be required for Town Centre developments states *'In Conservation Areas, good buildings should be retained and refurbished, or rebuilt. Poorer buildings should be replaced in traditional size, scale and form, to suit their context, in natural stone and*

slate'. The policy notes that external surface treatments and landscaping can add not only to the presence of the building but help to continue a general upgrading of the environment. The policy recommends that *'the 'hard' effect of areas of car parking should be softened by landscaping.'*

National Planning Policy Framework

In March 2012 the National Planning Policy Framework (NPPF) was published, which sets out the Government's planning policies for England and how these are expected to be applied. The NPPF must be taken into account as a material consideration in the determination of planning applications in accordance with Section 38 of The Act 2004.

Sustainable Development and Decision Taking

At the heart of the National Planning Policy Framework (NPPF) is ***'a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking'*** (paragraph 14) [emphasis added]. In this respect it is also notable that paragraph 17, bullet point 3, states that planning should *'proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to identify and then meet the housing, business and other development needs of an area, and respond positively to wider opportunities for growth'.*

Paragraph 7 of the NPPF stipulates that there are *'three dimensions to sustainable development: economic, social and environmental'*. The three components need to be pursued in an integrated way looking for solutions which deliver multiple goals. It is therefore clear that the NPPF wishes to see balanced decision making with all



factors considered rather than decisions made in isolation of the three overriding principles.

In line with the three dimensions of sustainable development identified in the NPPF the proposed development performs the following important roles:

Economic: Ensuring the vitality of city centres is identified in the NPPF as one of the Core Planning Principles in delivering sustainable development. The provision of an additional 54 (total for the development) units of accommodation within the Barnsley Town Centre will help enhance the vitality and viability of local shops and services. A report compiled by 'The Opinion Research Business' (ORB) entitled **A Better Life: Private Sheltered Housing and Independent Living for Older People** states how Retirement Living housing helps to underpin local shops, services and facilities. The report found that 62% of residents in Retirement Living schemes preferred to shop locally, with 45% of resident shopping within one mile of their scheme. The proposal will therefore help to improve the viability of businesses within the local centre and is therefore clearly economically sustainable.

The economic and community benefits provided by this form of housing are detailed in The Planning and Social Benefits of Retirement Living Housing (Chapter 5).

Social: The NPPF stipulates that the planning system should be '*supporting strong, vibrant and healthy communities*' by '*providing the supply of housing required to meet the needs of present and future generations*' (paragraph 7). Paragraph 50 of the NPPF highlights the need to '*deliver a wide choice of high quality homes, widen opportunities for home ownership and create sustainable, inclusive and mixed communities. Local planning authorities should plan for a mix of housing based on current and future demographic trends, market trends and the needs of different*

groups in the community...such as...older people'.

Older people are defined in Annex 2 - Glossary of the NPPF as "*people over retirement age, including the active, newly retired through to the very old frail elderly whose housing needs can encompass accessible, adaptable general needs housing for those looking to down size from family housing and the full range of retirement and specialised housing for the elderly*".

The NPPF also advises in Paragraph 159 that '*Local planning authorities should have a clear understanding of housing needs in their area*' and that policy should '*identify the scale and mix of housing and the range of tenures that the local population is likely to need over the plan period which meets household and population projections, taking account of migration and demographic change*' and '*addresses the need for all types of housing, including...the needs of different groups in the community (such as...older people)*'. Furthermore, the Framework stipulates that local policy should cater for '*housing demand and the scale of housing supply necessary to meet this demand*'.

A clear, priority need for private sheltered accommodation for the elderly has been established in 'The Need for Retirement Living Housing' chapter of this report (Chapter 4). The proposed development will assist the Council in meeting this housing need. Importantly however, the proposed development will enable older people to remain in their local environment and/or close to friends and family, allowing them to continue to play an important role in their local community. The proposed development is therefore considered to be inherently sustainable in social terms.



Environmental: The proposal is for a residential form of development that not only makes effective use of the land (paragraph 111 of NPPF) but also provides specialised accommodation for older people which meets a local need and addresses the changing demographic profile of Barnsley. It is therefore considered to be an environmentally sustainable development.

In regards to Housing Supply, Paragraph 17 lists the core land use planning principles that should underpin decision-taking. These include a proactive approach and support for ‘sustainable economic development to the deliver homes...that the country needs’, to seek high quality design and a good standard of amenity for all existing and future occupants.

Chapter 6 of the document sets out the Government’s objective in delivering a wide choice of high quality homes. Firstly, and notably, the guidance in this section is set out against the objective at the start of Paragraph 47 ‘to boost significantly the supply of housing’. This is in recognition of the level of need for new housing across the country against the recent dwindling trend of housing supply.

Paragraph 49 states that: ‘Housing applications should be considered in the context of the presumption in favour of sustainable development.’ This is of relevance when considering the sustainability of the appeal site. It also advises that ‘relevant policies for the supply of housing should not be considered up to date if the local planning authority cannot demonstrate a five year supply of deliverable housing sites’.

Planning Practice Guidance

The National Planning Guidance (April 2016), contains a new emphasis upon the “critical” need to provide housing for older people. The section on housing need and methodology notes:

‘The need to provide housing for older people is critical given the projected increase in the number of households aged 65 and over accounts for over half of the new households (Department for Communities and Local Government Household Projections 2013). The age profile of the population can be drawn from Census data. Projection of population and households by age group should also be used. Plan makers will need to consider the size, location and quality of dwellings needed in the future for older people in order to allow them to live independently and safely in their own home for as long as possible, or to move to more suitable accommodation if they so wish. Supporting independent living can help to reduce the costs to health and social services, and providing more options for older people to move could also free up houses that are under occupied. The future need for specialist accommodation for older people broken down by tenure and type (e.g. sheltered, enhanced sheltered, extra care and registered care) should be assessed and can be obtained from a number of online tool kits provided by the sector. The assessment should set out the level of need for residential institutions (Use Class C2). Many older people may not want or need specialise accommodation or care and may wish to stay or move to general housing that is already suitable, such as bungalows, or homes which can be adapted to meet a change in their needs. Local authorities should therefore identify particular types of general housing as part of their assessment’. [emphasis added].

This policy guidance clearly demonstrates the Government’s latest position supports the urgent need to provide specialist housing for the ageing population.

In conclusion, the golden thread running through the NPPF is a presumption in favour of sustainable development. The proposed development is located on an inherently sustainable site adjacent to Barnsley Town Centre, providing a specialist form of accommodation for the elderly that addresses the urgent and increasing



need within Barnsley. It is therefore wholly in keeping with the concept of sustainable development detailed within the NPPF.

Other Material Considerations

Section 38(6) of The Act 2004 requires planning applications to be determined in accordance with the Development Plan unless other material considerations indicate otherwise. Other material considerations, which carry less 'weight' in planning terms than the Development Plan, are considered below.

Supplementary Planning Documents

Further to the to development plan policies and national planning policies/guidance, Supplementary Planning Documents (SPDs) provide greater detail on specific themes and constitute a material consideration in decision making. The following SPD is of particular evidence:

Designing New Housing Development SPD (March 2012)

This SPD underlines the Council's commitment to new build development being on Brownfield sites and in sustainable locations that reduce the need to travel. The SPD refers to density of development and the need to make efficient use of land whilst considering the context of surroundings. Additionally, it provides detailed guidance on space standards in respect of separation distances, the requirement to respect the character of the area and also private amenity space.

Parking SPD (March 2012)

This SPD outlines the Council's guidelines for car parking, design of residential car parking and cycle parking provision. The guidance recommends that elderly persons

housing within the Barnsley Urban area should provide 1 space per unit and communal parking facilities.

Open Space Provision on New Housing Development (March 2012)

This SPD supplements Policy CSP35 that expects all new development to provide and maintain appropriate green space. The requirement is for general open space of 15% of the gross site area to be provided appropriate to the character of the site, its location and the layout and nature of the new housing and adjoining land uses. Where it is impossible to make such provision on the land a contribution will be sought towards off-site provision.



This section of the Planning Statement appraises the development proposals against the relevant planning policy context and in light of other material planning considerations. It specifically focusses on the principle of development given that the wider planning application submission is informed by a number of detailed reports which assess the proposals against environmental and technical policies.

Principle of Development

The site is located within the Barnsley Town Centre Boundary however it is not allocated for any particular use, within the emerging plan the site is identified within the Town Centre Zone of Westgate.

The site is currently vacant and been marketed on the open market as a re-development opportunity. The emerging local plan supports residential, shops, leisure and entertainment uses in this area.

Summary

The golden thread running through the NPPF is a presumption in favour of sustainable development. The proposed development is located approximately 400m from the District Centre and defined Shopping Area of Barnsley, providing a specialist form of accommodation for older people that addresses the urgent and increasing need recognised nationally and within the authority area of Barnsley. The proposed development is therefore wholly in keeping with the concept of sustainable development detailed within the NPPF.

Design Response

The proposed development has been designed to respect the character of the area in regards to massing, scale, height, style and materials. The scale and massing of the built development fronting Berneslai Close reflects that of the former Council Offices and does not exceed the eaves or ridge height of the existing building.

The development makes efficient use of land, achieving a development density in excess of the minimum policy requirement of *at least 30-50 dwellings per hectare net*”, and

The design of the proposal will ensure good standards of amenity, safety and privacy for future occupiers of the scheme, as well as for occupants of existing neighbouring buildings. The layout conforms with BMBC’s stated minimum separation distances. Furthermore, the design and layout of the scheme minimises the degree of overlooking between the new apartments and existing residential dwellings.

The proposed development will enhance the character and appearance of the immediate locality. The design and careful use of materials to construct the new development will respect and complement existing surrounding built development and will not harm the impact of the Conservation Area (justification can be found in the supporting Heritage Statement).

The development will be in keeping with the distinctive local character in terms of the use of materials, scale and mass whilst introducing housing to meet the needs of people in retirement. The NPPF sets out the Government’s objective of achieving good design at paragraphs 56, 57, 59, 60, 61 and 65.



In evolving design solutions the NPPF encourages pre-application engagement with the local community, statutory consultees and the local planning authority (paragraphs 188-191). The applicants in this case have complied with the advice and consulted with the local community and interested bodies. A Statement of Community Involvement has been submitted with the application.

In summary, the proposed redevelopment of this site will provide a sympathetically designed development that will not harm the character and appearance of the site, street scene and local area. Additionally, the proposal will offer significant benefits including high quality landscaping and the delivery of specialist housing for older people. Further details on the design and sustainability can be found in the accompanying Design, Access and Sustainability Statement and Heritage Statement submitted with this application.

Car Parking/Access

Specialised housing for older people, because of its very nature and concept, is invariably located within reasonable walking distance of shops and other essential services and close to public transport facilities. It can therefore be predicted that the level of car parking proposed, given the age of the intended residents, will adequately supply sufficient parking for the residents, concierge and visitors.

The proposal provides for 31 car parking spaces and 9 car parking spaces for the 11 apartments within the retained building. It should be noted that the parking provision is supplemented by the provision of a battery car store, suitable for the intended residents, and provides access to alternative forms of transport. Further information has been provided in the accompanying Transport Statement.

Amenity Space

As the market leader in the provision of this form of specialised accommodation, McCarthy & Stone has plenty of experience in assessing the functional requirements of its purchasers / residents. The design of the building is innovative in the ways which it maximises the potential for giving the residents optimum amenity spaces; both personal and communal through features including balconies and terraces. This will provide a high quality of life for the residents of the scheme.

Residents of this form of specialised housing tend to spend considerable time in their apartments and it is therefore appropriate that, wherever possible, lively or interesting views or pleasant and peaceful scenery should be visible from all rooms. Often the more favoured aspects are those on the busiest road frontage or those facing the main entrance and car parking area where activity is present.

The proposed development will include gardens for the enjoyment of the residents and will provide over 1188m² of amenity green space, which is approximately 27.6m² per unit.

The Company employs a professionally qualified landscape architect and prides itself on the quality of its landscape treatment, which has become a 'hallmark' of all McCarthy & Stone retirement schemes. A landscaping scheme is provided as part of the proposed application. Given the nature of the accommodation and the experience of McCarthy & Stone in this form of development, the proposed amenity space is considered appropriate.



Planning Obligations and Affordable Housing

There is a statutory requirement for decision makers to consider the impact of planning obligations on the viability of development in a balanced and fair manner. Unrealistic or overly optimistic expectations by decision makers jeopardises new developments coming forward. The Community Infrastructure Levy Regulations give the former Circular 5/05 Planning Obligations tests legal force and places the onus on the Council to justify that developer contributions are necessary and directly related in scale and kind to the proposed development.

The tests of planning obligations have been written into statutory law in Regulation 122 stating that:

'a planning obligation may only constitute a reason for granting planning permission if the obligation is:

- A. necessary to make the development acceptable in planning terms;*
- B. directly related to the development; and*
- C. fairly and reasonably related in scale and kind to the development.'*

Viability of development is the keystone of housing delivery, whether market or affordable and details of the viability of the development utilising the Homes and Communities Agency's Development Appraisal Toolkit are provided in the Planning Obligations and Affordable Housing Statement which accompanies this application and sets out the applicant's position on affordable housing.



In providing much needed accommodation for older people, the proposal will optimise the use of this previously developed site with an attractive new development. The site is ideally located for these type of Retirement Living apartments. It is close to the amenities of Barnsley District Centre and would contribute towards an identified need for specialised older persons housing in Barnsley.

Careful consideration has been given to the nature of the site, its relationship to its immediate surroundings and the amenities of neighbouring occupiers. The building has ceased use as an office block and was latterly being utilised as storage for the Council whilst the building was placed on the open market as a development opportunity.

Its redevelopment with a new high quality development with attractive landscaping will make an effective use of the site and retained building. At the same time Retirement Living apartments are a passive use, and an entirely sympathetic neighbour with extremely low levels of traffic generation in comparison to other potential housing uses of the site.

Points to note:

- The proposed development complies fully with the NPPF's objective of a presumption in favour of sustainable development. It fulfils all three dimensions of sustainable development listed by the NPPF. Providing a range of **economic** benefits, including direct employment in its own right, supporting the local economy and revitalising the housing market through

the release of under occupied family housing. Providing **social** benefits through the provision of specialist accommodation for older people and reducing pressure on health care facilities. Finally, providing **environmental** benefits through making effective and efficient use of a valuable land resource, improving the visual appearance of the site and immediate locality and assisting with the delivery of housing within a short-term timeframe which would reduce pressures on other less sustainable sites for residential development.

- As set out by the accompanying Design and Access Statement, the proposed development has evolved through thorough pre-application engagement with the local community, local planning authority and where relevant statutory consultees.
- The proposed development accords with both national (paragraph 50, NPPF) and local planning policies in respect to the delivery of older persons' accommodation, the delivery of which has been identified as 'critical' in the recent Planning Practice Guidance. Section 5 of this report identified the extant need for older persons' accommodation within Barnsley and the current shortfall of private sector forms of retirement housing.

In summary, having assessed the proposal against the statutory development plan and also the NPPF, we consider the proposed development to be entirely in accordance with the principles of sustainable development. It will make an important contribution towards an identified local housing need, as well as the overall supply of housing within Barnsley where there is currently an identified shortfall.

