

**Land south of Barugh Green Road, Barugh Green,
Barnsley**

Affordable Housing Statement

February 2025



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Appendices

Appendix 1 Approved Site Layout

Definitions

Additional First Homes Contribution

in circumstances where a sale of a First Home other than as a First Home has taken place, the lower of the following two amounts:

(a) 30% of the proceeds of the sale; and

(b) The proceeds of sale less the amount due and outstanding to any First Home Mortgagee of the relevant First Home under relevant security documentation which for this purpose shall include all accrued principal monies, interest and reasonable costs and expenses that are payable by the First Homes Owner to the First Home Mortgagee under the terms of any mortgage but for the avoidance of doubt shall not include other costs or expenses incurred by the First Homes Owner in connection with the sale of the First Home,

and which for the avoidance of doubt shall in each case be paid following the deduction of any SDLT payable by the First Homes Owner as a result of the disposal of the First Home other than as a First Home

Affordable Housing	Means housing provided to eligible households whose needs are not met by the market as defined in Annex 2 of the National Planning Policy Framework
Affordable Housing Scheme	a scheme for the provision of Affordable Housing within the Development
Affordable Housing Units	those dwellings which constitute Affordable Housing which shall represent no less than 20% of the total number of Dwellings (rounded up to the nearest whole number) to be constructed pursuant to the development
Affordable Rent	means 70% of the Affordable Housing Units which comply with the definition “affordable housing for rent” contained in Paragraph (a) of Annex 2 of the National Planning Policy Framework SAVE THAT the rent charged under all lettings may be increased or decreased annually in line with the Governments rent policy and “Affordable Rented Unit” shall be constructed accordingly
First Homes	means 25% of the Affordable Housing Units on the Site to be Disposed of as freehold or (in the case of flats only) as a leasehold property to a First Time Buyer at the First Homes Discounted Price and which on its first Disposal does not

exceed the Price Cap and reference to "First Home" shall be construed accordingly

First Homes Discounted Price a sum which is the Open Market Value discounted by a maximum of thirty percent (30%)

First Homes Mortgagee any financial institution or other entity regulated by the Prudential Regulation Authority and the Financial Conduct Authority to provide facilities to a person to enable that person to acquire a First Homes including all such regulated entities which provide shari'ah compliant finance for the purpose of acquiring a First Home

First Homes Owner the person or persons having the freehold or leasehold interest (As applicable) in a First Home other than:

(a) a developer or other entity to which the freehold interest or leasehold interest in a First Home or in the land on which a First Home is to be provided has been transferred before that First Home is made available and is disposed of for occupation as a First Home; or

(b) the freehold a tenant or sub-tenant or a permitted letting

Intermediate Housing Units

means the Affordable Housing Units which are to be provided in accordance with paragraphs (b), (c) and (d) of the definitions of Affordable Housing in Annex 2 of the National Planning Policy Framework or Build to Rent housing as defined in Annex 2 of the National Planning Policy Framework

Other Affordable Home Ownership

means 5% of the Affordable Housing on this site which is not Affordable Rented Units or First Homes and may be provided as Shared Ownership Units or such other type of home ownership as agreed in writing with the Council

1. Introduction

- 1.1 Avant Homes are submitting a full planning application for the erection of 155 dwellings to the Local Planning Authority (Barnsley Metropolitan Borough Council) to which this statement relates. As part of the application, it is proposed that 20% are to be Affordable Housing Units (in line with the S106 Agreement).
- 1.2 For validation purposes, there is a requirement for an Affordable Housing Statement to be submitted to the Council setting out a number of matters relating to the affordable housing provision for the scheme. This document is to discharge the obligation within the S106 Agreement regarding the submission of an Affordable Housing Statement pursuant to this development.

2. Affordable Housing Scheme Requirements

2.1 The validation of this application requires the preparation of an Affordable Housing Scheme for the provision of Affordable Housing within the Development which shall include:

a) Tenure, type, size, cost, standard of the Affordable Housing Units of which 70% shall be Affordable Homes for rent, 25% First Homes and the remaining 5% shall be other affordable home ownership.

b) Purchase of the First Homes must meet the following criteria, and should apply to all subsequent sales of a First Home property:

- They should be a first-time buyer.
- whether individuals, couples or group purchasers, they should have a combined annual household income not exceeding £80,000 in the tax year immediately preceding the year of purchase.
- A purchaser of a First Home should have a mortgage or home purchase plan (if required to comply with Islamic Law) to fund a minimum of 50% of the discounted purchase price.
- Demonstrate a Local Connection.

2.2 The timing for the provision of the Affordable Housing Units, having regard particularly to any proposed phasing of the overall development.

2.3 If any of the Affordable Housing Units have not been contracted for sale to a Registered Provider within six calendar months of the date of Practical Completion of the last of the Affordable Housing Units or such

earlier date as to be agreed in writing with the Council and the Council has confirmed in writing that it is satisfied that everything has been complied with. The owner shall then pay the Affordable Housing Contribution to the Council PROVIDED THAT such sum shall only be payable in respect of those Affordable Housing Units not already transferred to the Registered Provider and upon such payment the Owner will be free to offer such dwellings for sale on the open market free from the Affordable Housing obligations in this Third Schedule as Market Dwellings.

3. Affordable Housing Scheme Compliance

- 3.1 In order to satisfy each criterion, the following information and statements are considered to comply with the requirements for the Affordable Housing Statement.
- 3.2 The following table identifies which plots are to be affordable units on the proposed development.

First Homes

House Type	No. of Units	No. Beds	Size (sqm/sq.ft)
E2.1	2	2	76.27/821
B3	6	3	90.28/972

Other Affordable Home Ownership

House Type	No. of Units	No. Beds	Size (sqm/sq.ft)
Leyburn	1	3	87.98/947

Affordable Rent

House Type	No. of Units	No. Beds	Size (sqm/sq.ft)
E2.1	6	2	76.27/821
B3	8	3	90.28/972
D4	2	4	116.74/1257
HAT	2	2	76.01/818
Bramley	2	1	62.54/673
Totley	2	1	68.48/737

- **Appendix 1** to this report confirms positions of the affordable units on the site layout for the initial phase.
- **Appendix 2** is the house type plans and elevations which confirm the type and size to be provided in the initial phase.

3.3 It is proposed that all affordable rented units and the Other Affordable Home Ownership units on this development will be transferred to a Registered Provider and will follow the process below through the transfer to them.

4. Transfer of Affordable Rented Housing Units

- 4.1 Not to transfer the Affordable Rented Housing Units otherwise than to a Registered Provider.
- 4.2 The transfer of the Affordable Rented Units to a Registered Provider shall be on the following terms unless otherwise agreed in writing with the Local Planning Authority.
- From the date of Substantial Completion of each Affordable Rented Unit not to grant leases or tenancies of the Affordable Rented Units to occupiers other than the grant of leases or tenancies by a Registered Provider or Registered Providers at Affordable Rents.
 - Following the Substantial Completion of each Affordable Rented Unit, the Affordable Rented Unit shall not be used or Occupied other than as an Affordable Rented Unit which is let by a Registered Provider to persons identified at an Affordable Rent save that this obligation shall not apply to any Protected Tenant or any mortgagee or chargee of that Protected Tenant or any person deriving title from the Protected Tenant or any successor in title thereto and their respective mortgagees and chargees.
 - The Registered Provider shall not:
 - use or permit any Affordable Rented Unit to be used or Occupied for any purpose other than as an Affordable Rented Unit managed by a Registered Provider and which is to be let at a rent which does not exceed the Affordable Rent; and

- allocate the Affordable Rented Units except through the Council's Choice Based Lettings System, other than where an existing policy between the Council and Registered Provider already exists or comes to be agreed.

AND FOR THE AVOIDANCE OF DOUBT the obligations shall not apply to any Protected Tenant or any mortgagee or chargee of that Protected Tenant or any person deriving title from the Protected Tenant or any successor in title thereto and their respective mortgagees and chargees or to any mortgagee or chargee of the Registered Provider and its successors in title and their mortgagees and chargees or to any Affordable Housing Mortgagee and its successors in title and their mortgagees and chargees.

5. Transfer of Other Affordable Home Ownership

- 5.1 Affordable home ownership properties, including First Homes, will be subject to resale restrictions to ensure they remain affordable to eligible buyers upon subsequent transfers. This mechanism ensures that the benefits of affordability continue to support local residents, particularly key workers and first-time buyers, over the lifecycle of the property.
- 5.2 Shared ownership homes will be transferred under a resale process that allows future buyers to purchase the seller's share at market value. When an owner wishes to sell their share, they must first notify the relevant registered provider, who will oversee the sale process to ensure compliance with affordability and eligibility requirements.
- 5.3 Future buyers of shared ownership homes will be subject to eligibility checks to confirm that they:
- Qualify as first-time buyers or meet specific local needs criteria outlined by Barnsley Council.
 - Fall within income limits established by the council or housing provider, typically aligned with the national shared ownership scheme guidelines.
 - Have a local connection to Barnsley, with priority for those currently living or working within the area, especially key workers.
- 5.4 A registered provider will facilitate and monitor the resale process to ensure the property remains affordable and accessible to those meeting the criteria. In cases where a suitable buyer cannot be identified, Barnsley Council may have the right to identify an eligible

buyer from the waiting list or offer the home to another local resident in need.

6. First Homes

- 6.1 To provide 25% of the total number (rounded up or down to the nearest whole Dwelling) of the Affordable Housing Units on the Site as First Homes in accordance with this Schedule and shall be provided and retained as First Homes.
- 6.2 The First Homes shall not be visually distinguishable from the Open Market Dwellings based upon their external appearance.
- 6.3 First Homes must;
- Be discounted by a minimum of 30% against the Market Value;
 - Be sold to a person or persons meeting the First Homes eligibility criteria;
 - On their first sale, will have a restriction registered on the title at HM Land Registry to ensure this discount (as a percentage of current market value) and certain restrictions are passed on at each subsequent title transfer; and
 - After the discount has been applied, the first sale must be priced no higher than £250,000.
- 6.4 Local and National Eligibility criteria will apply to the First Homes Scheme. This includes;
- They should be a first-time buyer;
 - Whether individuals, couples or group purchasers, they should have a combined annual household income not exceeding

£80,000 in the tax year immediately preceding the year of purchase;

- A purchaser of a First Home should have a mortgage or home purchase plan (if required to comply with Islamic law) to fund a minimum of 50% of the discounted purchase price;
- Demonstrate a Local Connection.

6.5 The Council will seek a financial contribution from the developer (£1,500 per plot) to administer the First Homes scheme, secured in the Section 106 Agreement.

7. Summary and Conclusion

- 7.1 This affordable housing scheme is submitted to set out the delivery of the 20% Affordable Housing Units on the site in relation to the full planning application. It is intended that Avant Homes will construct all of the Affordable Housing Units under the planning permission.
- 7.2 All Affordable Housing units identified in this statement as being Affordable Rent and Other Affordable Home Ownership will be transferred to a Registered Provider who on completion will manage the process of delivering them as per the suggested tenure split.
- 7.3 All First Homes provided on this scheme will be sold in line with the provisions identified in this statement.

Appendix 1

Proposed Site Layout

