

# Self-Build and Custom Housebuilding:

## Guidance for self-builders and developers

Supplementary Planning Document



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# 1: OBJECTIVE OF SPD

This Supplementary Planning Document (SPD) has been produced to provide guidance and advice to the local planning authority, developers, landowners, aspiring self and custom builders and the community to enable the delivery of self-build and custom homes through successful planning applications, with specific detail on:

- how a range of self and custom build homes are delivered in South Gloucestershire,
- the planning policy context in terms of new, revised, and emerging policy and how it relates to self and custom build homes,
- the marketing of plots for self and custom build homes in South Gloucestershire
- addressing climate change mitigation and adaptation, and the Climate Emergency declared by the Council, and
- topics addressed in our Self-build Delivery Statement (Local Planning Application requirement October 2019).

## 2: ROLE OF DOCUMENT

### THE PRINCIPAL OBJECTIVES OF THIS SUPPLEMENTARY PLANNING DOCUMENT (SPD)

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The purpose of this Supplementary Planning Document (SPD) is to provide guidance and advice for those seeking to build self-build and custom homes in South Gloucestershire.

The SPD will be of particular relevance to self-build plot providers, developers building more than 100no. dwellings, and anybody else wishing to build their own home. It is essential that developers of larger sites consider how the required self and custom build plots will be brought forward at an early stage.

The SPD must be considered in light of the wider planning policy context, including the South Gloucestershire Council Core Strategy (adopted December 2013), South Gloucestershire Local Plan: Policies, Sites and Places Plan (adopted November 2017), Self-build and Custom Housebuilding Act 2015, Housing and Planning Act 2016, The Housing White Paper (2017), National Design Guidance (2019), and the National Planning Policy Framework February 2019 (NPPF).

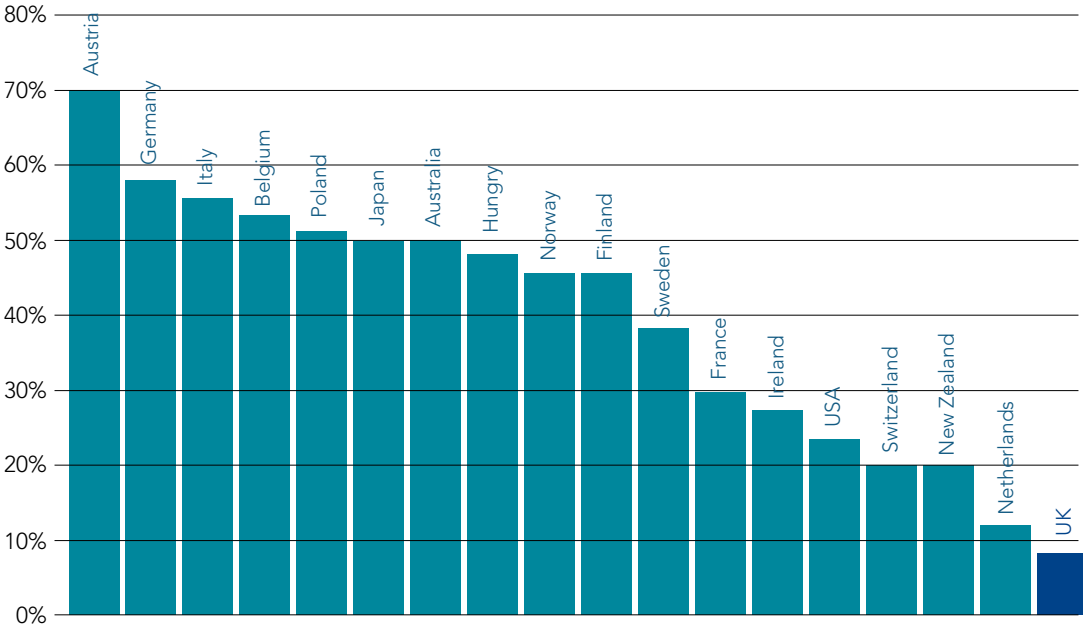
In addition to this, the Government amended the Climate Change Act 2008 to bring into law the target for all greenhouse gas emissions to be net zero by 2050. However, in order to pursue efforts to limit warming to 1.5C (as per the Paris Agreement in 2015) and avoid the severest impacts of climate change, it is important that the 'net zero' target is achieved much sooner. Consequently, many Councils have declared a Climate Emergency and set a 2030 target. South Gloucestershire Council made a Climate Emergency declaration on 17th July 2019 which included the commitment to provide the leadership to enable the whole of South Gloucestershire to be carbon neutral by 2030. Key issues in relation to Climate Change will be addressed in this context, as well as the context of the New Local Plan.

### 3: INTRODUCTION

South Gloucestershire Council has a strong ambition to promote and deliver self and custom build housing within the district, as well as a duty to deliver self and custom build plots through the Self-Build and Custom Housebuilding Act 2015 (as amended by the Housing and Planning Act 2016). Self-build and custom-built homes could be a route for some to get on to the property ladder and for others to build their 'dream home'.









One of the main purposes of this Supplementary Planning Document is to guide planning decisions made by the Council for self-build and custom build homes. It explains the planning mechanisms by which they will be delivered and clarifies the Council's expectations in relation to size, type and build-route.

Every year, around 11,000 people build their own house. Whilst self and custom housebuilding are still relatively unusual in the UK, this method of building houses is considered the norm in countries such as Austria and the Netherlands.



**Figure 1:** International comparison of Self-build and Custom Housebuilding, image taken from 'A Guide to delivering Custom and Self Build housing development in your Community' (June 2019), Mid Devon District Council.

The Council recognises the benefits self and custom build housing has to offer South Gloucestershire residents over mainstream developer models of delivery. These may include:

-  Opportunity to create a home that perfectly suits your lifestyle;
-  Increased housing choice;
-  Enhanced diversity of supply;
-  Effective way of increasing the mix of housing types and tenures;
-  Custom-builders are more likely to be more innovative, build sustainable homes with high energy efficiency and to use green technology;
-  Improved build quality;
-  Custom-builders are more likely to use local suppliers and trades people supporting the local economy and creating a strong sense of community;
-  Lower development costs;

This SPD has been prepared in accordance with the Local Plan Regulations.

When adopted, the SPD will become a material consideration when determining planning applications. This SPD will be updated should the need arise due to changes in national or local policy on self-build and custom housing.



**Figure 2:** This new single storey dwelling on Hortham Lane, Almondsbury, replaced an existing 3no. bedroom bungalow with a more modern, open plan, family home (Ref. PT18/4878/F). An asymmetric roof modernises this bungalow, as well as the addition of a side dormer window, which increases daylight into the living space. The owners decided to demolish the existing dwelling and build a fit-for-purpose modern, family home.



## 4: WHAT IS SELF-BUILD AND CUSTOM HOUSEBUILDING?

“Self-build” is the practice of creating an individual home for yourself. The self-builders input into this process may vary, from undertaking the actual building work to contracting out all the work to an Architect or building package company, or contracting the development of the shell of a building and completing the internal building work themselves. “Custom Build” housing is where the home is custom built to the individuals specification, as opposed to being designed and built by a construction company to a standard specification for sale. It can also be built or commissioned by individuals or groups of individuals.

The Self-build and Custom Housebuilding Act 2015 (as amended by the Housing and Planning Act 2016) provides a legal definition of self-build and custom housebuilding:

**“Self build and custom housebuilding” means the building or completing by –**

- a)** Individuals,
- b)** Associations of individuals, or
- c)** Persons working with or for individuals or associations of individuals, of houses to be occupied as homes by those individuals.

But it does not include the building of a house on a plot acquired from a person who builds the house wholly or mainly to plans or specifications decided or offered by that person.

The Act does not distinguish between self-build and custom housebuilding. The differences have been summarised by Brandon Lewis, the then Minister of Housing and Planning, who stated that “[the] definition of ‘self-build’ covers someone who directly organises the design and construction of their new home, while ‘custom build’ covers someone who commissions a specialist developer to help to deliver their own home”.

Government guidance states that, *'In considering whether a home is a self-build or custom build home, relevant authorities must be satisfied that the initial owner of the home will have primary input into its final design and layout.'*

*National Planning Practice Guidance Paragraph: 016 Reference ID: 57-016-20170728*

Both routes require significant input from the homeowner in the design process of the home. The Council does not consider that speculative market housing delivered by a developer, off-plan sales, or circumstances where developers give clients limited fit-out choices comply with the legislation and accompanying Government guidance. The development will not be considered self-build for planning purposes and neither will the development benefit from CIL relief. This is in accordance with the legal definition (above) as set out in the Housing and Planning Act 2016 and the Community Infrastructure Levy (Amendment) (England) Regulations 2019.

In either case, it is expected that the dwelling will be the principle residence for the owner for at least the following three years. The provision of a plot for either self or custom build requires an appropriate highway along with the basic utilities brought to the edge of the plot.



**Figure 3:** The construction of a modest, two storey house self-build dwelling is underway on the outskirts of the village of Rangeworthy (Ref. P19/3609/F). The landowner (a Builder by trade) is building the property himself. The modest cottage design and materials of the dwelling are informed by its setting and the local character.



## TYPES OF SELF-BUILD

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Generally speaking, if a site is suitable for housing, it is suitable for self and custom build housing.

This can include single detached homes on small plots, family homes on larger plots, larger infill developments, regenerative opportunities, community self-build projects, terraced properties, and apartments. Self and custom build are not prescriptive or restrictive. There is a sliding scale of self-build to custom build, as described below:

### Self-build

#### A one-off home

The owner manages the design and construction process and undertakes a proportion of the building work too;

#### Contractor-built one-off home

The owner manages the design process and selects a contractor to build the home;

#### Kit/modular/package-build home

The owner selects the kit home which is erected by the kit home manufacturer;

#### Community-led housing (CLH)

Schemes involve groups of local people in housing need building homes for themselves with external support and managing the process collectively. Individual self-build is not widely regarded as community-led housing. There are now a number of iterations of CLH;

#### Supported community self-build group

Project is often organised by a social landlord, a local authority, a community land trust or the Community Self Build Agency (CBSA) , and this approach tends to suit people on low incomes who like the idea of someone co-ordinating the group on their behalf.

## Custom build

### Developer-built one-off home

Undertaken by a developer/enabler, the design is commissioned by the plot owner. The plot owner is integral to the design of the home. The developer/enabler takes care of the whole process start to finish, on behalf of the plot owner;

### Developer-led group project

A developer organises a group and builds the homes.

Other forms of 'self finish' Custom Build houses where the dwelling is not built or commissioned by the occupant may not be considered by the Council to be true self-build and are also not recognised by the CIL regulations.



**Figure 4:** The recent completion of a stunning, substantial, modern 6no. bed dwelling in the village of Rangeworthy (Ref. PT18/5334/F). Materials are a mix of traditional and contemporary; rendered masonry walls with feature cedar cladding to the gables.



**Figure 5:** A self-build dwelling in progress located on a rural site, on the outskirts of Yate (Ref. PK18/4475/F). The form of the property has been inspired by local rural farm buildings with contemporary elements

**Serviced self-build plots can be delivered in a number of ways, including the following key routes:**

**Multiple individual serviced plots required via the South Gloucestershire Local Plan: Policies, Sites and Places Plan (adopted November 2017), Policy PSP42**

Criteria 4 of Policy PSP42 requires developers to supply at least 5% of the total dwellings on residential and mixed-use sites of over 100 dwellings, for sale to self and custom builders. Plots will be located on larger sites in and around the larger communities within South Gloucestershire;

**Council-owned land**

Opportunities for custom build dwellings on Council-owned land as and when it becomes available for redevelopment or disposal will be investigated (criteria 2 of PSP42);

**Single or small sites delivering 100% self and custom build plots on the open market**

These are likely to be windfall sites resulting from sub-divisions, re-using larger plots with a single dwelling for multiple dwellings/plots, etc;

**Private landowners**

Bringing their sites forward for self and custom housebuilding plots;

**Single or small sites delivering affordable plots, including Rural Exception Sites (criteria 7 of Policy PSP42)**

These are windfall sites delivered primarily by organisations, such as Housing Associations and Community Land Trusts;

**Site allocations**

The Council will investigate allocating sites for self and custom housebuilding through the New Local Plan; and

**Sites delivered by Town or Parish Councils via their Neighbourhood Plans or Neighbourhood Development Orders (criteria 8 of Policy PSP42)**

These are likely to be windfall sites resulting from sub-divisions, re-using larger plots with a single dwelling for multiple dwellings/plots, etc;



## REGISTER

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The Housing and Planning Act 2016 introduced a 'Right to Build' which requires that all 'relevant authorities' in England have a legal duty to keep a register of individuals and associations of individuals who are seeking to acquire serviced plots of land in the authority's area. The requirements to maintain a Self-Build Register and have regard to it when carrying out planning, land disposal and regeneration functions derives from the Self-Build and Custom Housebuilding Act 2015 (as amended by the Housing and Planning Act 2016). The register monitors interest and quantifies the volume of plots for which suitable planning permission should be granted and runs in base periods of 12 calendar months (commencing 31st October – 30th October).

The legislation imposes a duty upon the Council to grant sufficient 'development permissions' to meet the demand for self-build and custom housebuilding in their area on a rolling three-year basis. The demand is that which is evidenced on the register (i.e. the number of entries). The register is open to all who have an interest in self and custom build within the District.

In accordance with this requirement, the Council established a Self-Build Register in April 2016. The Self-build Register is used to measure the demand for self-build in the district, collect information on the types, sizes and locations of the plots sought, and to contact prospective self-builders when plots become available. Further information about how to join the Council's register can be found online at <https://www.southglos.gov.uk/housing/custom-build/> .

In February 2018, in line with the Self-build and Custom Housebuilding Regulations 2016, the Council introduced a local connection test to ensure that the register provided a reflection of the level of demand generated from people living within South Gloucestershire or at least with a connection to it. This requires applicants to confirm their local connection by providing documentation (each member of an association will be required to meet the local connection criteria). The register is now divided into two parts:

**Part 1** – people who meet the local connection test and the basic eligibility set by central government;

**Part 2** – people without a local connection but who meet the basic eligibility set by central government.

The Council's Self-build Register shows a strong demand for self and custom



build plots in South Gloucestershire, with 978 individuals joining the register to date. There is a need to deliver plots efficiently to ensure the demand is met. Of those on our register, we have a total of 978 registered applicants, of which 783 qualify as Part 1 (as of August 2020). The National Custom & Self Build Association (NaCSBA) have ranked all English authorities rated by the number of people on their self-build register. South Gloucestershire Council's register rates third, the second being Bristol City Council and first Bath and North East Somerset Council (both have just over 1000 entrants on their respective registers, as of September 2020).

The Council is required to monitor all applications for new dwellings to identify whether they count as self or custom build dwellings to ensure that the Council are meeting the necessary demand on their register.

Planning application forms for Full and Outline planning permission include a question on the number of residential units and the type of units that are being proposed (i.e. market, social, affordable, starter homes, and self and custom build, and so on). Applications for self and custom build can also be identified in the proposal description or Planning Statement. In accordance with our local planning application requirements, applications involving any self and custom build housing and those that trigger criteria 4 of PSP42 (5% of total dwellings requirement) must submit a [Self-build Delivery Statement \(refer to Appendix 1\)](#).

## 5: PLANNING POLICY CONTEXT

### SELF AND CUSTOM BUILD HOUSING NATIONAL PLANNING POLICY AND GUIDANCE

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The Housing White Paper (2017) reaffirms the Government's commitment to increasing housing supply and consumer choice through self and custom housebuilding. The National Planning Policy Framework February 2019 (NPPF) sets out that the planning system should contribute to sustainable development through the delivery of a wide choice of high quality homes.

NPPF paragraph 59 sets out that a sufficient amount and variety of land can come forward where it is needed, that the needs of groups with specific housing requirements are addressed and that land with permission is developed.

In paragraph 61 of the NPPF regarding delivering a sufficient supply of homes, reference is made to people wishing to build their own homes:

“Within this context, the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies (including, but not limited to, those who require affordable housing, families with children, older people, students, **people with disabilities, service families, travellers, people who rent their homes and people wishing to commission or build their own homes**).”

The associated NPPF Footnote 26 states:

“Under section 1 of the Self Build and Custom Housebuilding Act 2015, local authorities are required to keep a register of those seeking to acquire serviced plots in the area for their own self-build and custom house building. They are also subject to duties under sections 2 and 2A of the Act to have regard to this and to give enough suitable development permissions to meet the identified demand. Self and custom-build properties could provide market or affordable housing.”

The glossary of the NPPF also defines such housing as follows:

**“Self-build and custom-build housing:** Housing built by an individual, a group of individuals, or persons working with or for them, to be occupied by that individual. Such housing can be either market or affordable housing. A legal definition, for the purpose of applying the Self-build and Custom Housebuilding Act 2015 (as amended), is contained in section 1(A1) and (A2) of that Act.”

Further guidance is provided in the Government’s Planning Practice Guidance (PPG) <https://www.gov.uk/guidance/self-build-and-custom-housebuilding>.

National Design Guidance (2019) forms part of the Government’s collection of

planning practice guidance. Paragraph 118 advises “Well-designed larger scale developments include a range of tenures. They also **promote a variety of development models, such as community-led development, self and custom build and build to rent. This supports a diversity of delivery**, by small as well as large developers. It also helps to create rich, diverse settlements”.

## LOCAL POLICY

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[South Gloucestershire Local Plan: Core Strategy 2006 – 2027](#) (adopted **December 2013**) sets out a long-term vision for future development in South Gloucestershire to 2027.

One of the objectives of the Core Strategy is to provide a range of housing to meet the needs of the whole community and providing decent and affordable housing in accessible locations and for local needs in rural areas. Policies set out to address specific aspects of the mix and balance of housing provision in the district.

The mix, size and tenure of the housing delivered by the Core Strategy will meet the full range of housing needs that exists in South Gloucestershire, including affordable housing, and smaller family houses to enable new households to get on the housing ladder and for older households to downsize, and those with other special needs or disabilities.

In addition, chapter 5 of the CS sets out high quality design and responding to climate change. Policies promote high quality design and energy efficient development, and new sources of decentralised, renewable and low carbon sources of energy. Consideration should also be given to how buildings are laid out and orientated to enhance energy efficiency and the potential for the addition of renewable energy technologies, such as solar panels.

The [South Gloucestershire Local Plan: Policies, Sites and Places Plan](#) (adopted **November 2017**) (PSP) forms part of the South Gloucestershire Local Plan including the Joint Waste Core Strategy (adopted 2011) and Core Strategy (adopted 2013). The PSP sets out the overall development strategy.

Policy PSP6 On-site Renewable and Low Carbon Energy sets out that all development proposals will be encouraged to minimise end-user energy requirements over and above those required by the current building regulations through energy reduction and efficiency measures, and be expected to ensure the design and orientation of roofs will assist the potential siting and efficient operation of solar technology.

In addition, all major Greenfield residential development will be required to reduce CO<sub>2</sub> emissions further by at least 20% via the use of renewable and/or low carbon energy generation sources on or near the site providing this is practical and viable.

Policy PSP42 Self-Build and Custom Housebuilding sets out the Council's positive and encouraging approach to ensuring the sufficient delivery of land for people wishing to build their own homes. It requires developers to supply at least 5% of the total dwellings on residential and mixed-use sites of over 100 dwellings, for sale to self and custom builders.

**On the 17 July 2019, South Gloucestershire Council declared a Climate Emergency. This means that the council is saying we all need to urgently take steps to address this situation by preparing for the local impacts of climate change and by reducing our carbon emissions. As part of this declaration, the council has pledged to provide the leadership to enable South Gloucestershire to become carbon neutral by 2030 and the generation of renewable energy needs to be significantly increased. The South Gloucestershire [Climate Emergency Strategy](#) forms a material consideration in the determination of planning applications. More information on sustainable energy can be found [here](#).**

The overarching vision set out in the Climate Change Strategy is:

“A climate resilient South Gloucestershire with a thriving low carbon economy and lifestyle reflected in our travel, homes, businesses and communities, where nature can flourish.”

Through design policy CS1 of the adopted Core Strategy and PSP6, self and custom build dwellings will be encouraged to achieve high quality and energy efficient design, and incorporate renewable energy generation technology (for both heat and power), as standard. If the 2030 carbon neutral target is to be achieved, then all built development must be designed and built to a 'net zero carbon' standard.

The **Community Infrastructure Levy** (CIL) was introduced in 2010 and is a tool for local Councils to help raise funds from developers to deliver infrastructure, such as new schools, open space or public transport. CIL is charged for certain developments in the area. Affordable and self and custom build housing are subject to CIL relief. Self-builders can claim for exemption or relief from the CIL where the relevant criteria are met, and the correct process is followed. Claims for a self-build exemption (relating to a whole house) should be submitted using Form 7: Self Build Exemption Claim Form Part 1 before any work commences on site.

More information is available on our [Community Infrastructure Levy web page](#).

**Appropriate weight should therefore be given to the advice set out in this SPD which supports the interpretation and delivery of the Council's adopted Local Plan policy.**



## 6. LARGE SITES

### WHAT IS THE 5% POLICY REQUIREMENT?

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As set out in Policy PSP42, large residential and mixed-use sites of over 100 dwellings should provide at least 5% of self and/or custom house building serviced plots (that meet the definition of self-build and custom housebuilding plots within the Housing and Planning Act 2016 as amended or any subsequent amendment).

Where the total number of plots to be provided includes part of a whole number then the number of self and custom build plots shall be rounded up to where the part of the whole number of 0.5 or more and shall be rounded down where the part of the whole number is less than 0.5.

The Council expects these plots to be shovel-ready parcels of land, with outline planning permission, laid out and ready for construction with access and utilities/services provided to the plot boundary, as set out below:

### PLANNING APPLICATIONS

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The Council would expect sites delivering self and custom build plots, including those via policy PSP42, to seek planning permission for the self-build element of the scheme. It is expected that sites of more than 1 custom-build plot will generally be brought forward by way of an Outline planning permission, followed by full details (reserved matters). It is worth noting that CIL payments are required on all plots at the point of planning permission. In all cases where CIL is payable in relation to the development, the collecting authority will expect the developer, landowner or another interested party, to assume liability for the levy by submitting an assumption of liability form. It may speed up the process of issuing a liability notice if this form is submitted before planning permission is granted [PPG, Paragraph: 120 Reference ID: 25-120-20190901]. Further information on CIL can be found on page 17 and Section 8 'Other Matters'.

Applications which are required to provide 5% serviced plots for self and custom build plots should be accompanied by a delivery statement, which sets out the programme for delivering the plots to a serviced and remediated condition including details of access, servicing, infrastructure, subdivision and boundary treatment and how the delivery of plots will meet the definition of self-build and custom housebuilding and the definition of serviced plots (The Housing and Planning Act 2016 (section 9, (1))).

The following considerations should be taken into account when delivering multiple serviced plots:

## PHASING

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On larger sites, the Council will expect the early delivery of parcels of self and custom build plots. The Council will work with developers seeking to make a case for the later phasing, if they have demonstrable commercial reasons why early phasing would be a challenge. Some of the circumstances whereby the Council would not normally expect early phasing of CSB could include, for example, where there is a critical infrastructure requirement necessary to unlock development. There may be merit, given the potential complexity of phasing and the staff resource needed, to promote with developers the need to ensure early engagement with the Self Build and Planning Case officers in respect of phasing. It is important that developers consider the timing of the servicing and provision of the plots early on as this is an important aspect of their delivery. On larger sites, this will be dealt with via a legal agreement such as a section 106 agreement. On smaller scale projects, this may be more simply dealt with via planning conditions. [An example of a section 106 agreement which includes standard clauses for self and custom build schemes on large sites](#) (refer to Appendix 2).

Careful consideration will be required as to how the development phasing of the site will interact with CIL payments (i.e. to ensure that CIL is not inadvertently triggered across the whole self-build element of the scheme due to commencement elsewhere on the site). This could result in the loss of the biggest financial benefit of self and custom build – CIL relief. This could result in an additional non-factored cost of several £1000's for the plot owner and potentially the other plot owners on site.

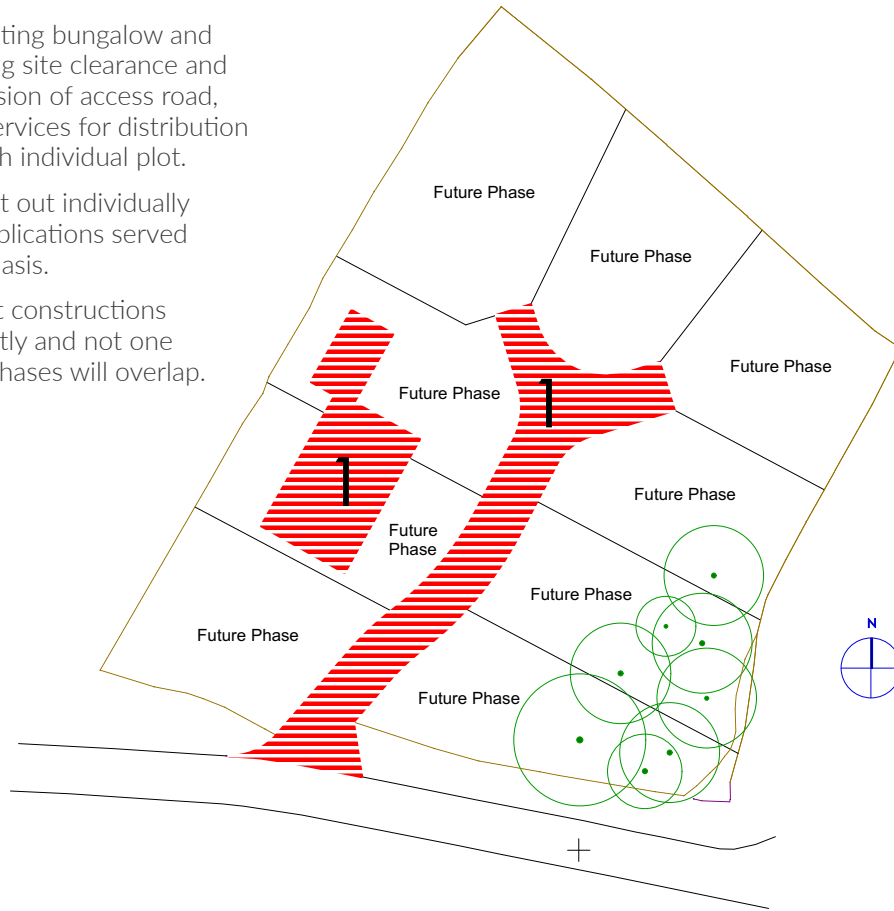
This can be managed through a self-build phasing plan, which identifies phasing for the self and custom build element, and at a later stage, individual phases for each of the self and custom build plots, with separate phases for the access works and the standard residential housing on site.

For example, if a site is to provide 20no. self and custom build homes, this could be divided into two phases for the custom and self-build proportion. Phase 1 could be the provision of access road, footpath and all services to the site for individual plots and phase 2 would include the remaining plots to be developed individually on a plot by plot basis (it is critical that each plot is identified as an individual 'future phase').

**Phasing Plan:**

1. Demolition of existing bungalow and workshop including site clearance and preparation. Provision of access road, footpath and all services for distribution around site to each individual plot.
2. All plots to be built out individually following ARM applications served on a plot by plot basis.

The individual plot constructions will run concurrently and not one at a time. ie. the phases will overlap.



**Figure 6:** A local example of an approved phasing plan from a 100% custom build site consisting of 9no. self and custom build plots at 11 Hortham Lane, Almondsbury (Ref. PT16/3579/O).

A self-build phasing is usually included as a planning condition attached to the decision notice.

## DELIVERY

The Council’s strategy to meet its duties in relation to the Right to Build is principally focussed upon the delivery of serviced plots on large residential developments and mixed-use sites. The Council seeks 5% of the total dwellings on residential and mixed-used sites of over 100 dwellings, for sale to self and custom builders, on a sequential basis.

It is expected that serviced plots will come forward in the following ways:

- serviced plots on large residential development and mixed-use sites
- Council-owned sites
- proposals for self and custom-build sites initiated by developers (windfall sites and single plots brought forward by individuals)
- site allocations in New Local Plan, and
- Rural Exception Sites.

There are a number of build routes for the delivery of self and custom build homes. The Council will endeavour to apply the requirements of this SPD pragmatically to facilitate the delivery of self and custom-build plots.

## **SELF-BUILD PARTNERSHIP**

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South Gloucestershire Council have developed a new and innovative route to enable the delivery of serviced plots in South Gloucestershire. Our 'Self-Build Partnership' will enable the delivery of self and custom build plots we have secured through Section 106 legal agreements. Through our policy PSP42 of the PSP Plan, we require developers to supply at least 5% of the total dwellings on residential and mixed-use sites of over 100 dwellings for sale to self and custom builders. We have, to date, secured 120no. self and custom build plots, with a further 132no. plots pending determination of planning applications.

This 'Self-Build Partnership' marks a positive and pro-active step towards enabling and speeding-up the delivery of self and custom build plots. The Partnership sets out a series of delivery standards to ensure excellence in the delivery of self and custom build homes.

By following the 'partnership with enabler' model we could increase the delivery and supply of quality serviced plots for the developer and the Council. The developer would (with a third party, i.e. a self and custom build enabler) provide serviced building plots. The self-build enabler may sell the plots to private homebuilders to design and build or commission their own home, they may also provide design and build contracts to meet the private homebuilders' individual design.

The Partnership encompasses a number of services and benefits to promote the delivery of serviced plots on large sites, including the following:

### **For Developers:**

- A streamlined process and guide for developers (self and custom build is still a relatively new requirement for developers);
- Provide a list of Enablers who achieve best practice and fulfil the standards required to join the Partnership;
- Increased ease of marketing the plots with ability to target applicants on the self build register.

### **For Enablers:**

- A supply of self and custom build plots for delivery;
- Ability to market directly to self and custom build applicants from the register,
- Act as point of contact to coordinate enquiries from prospective plot purchasers;
- Promote Plot Passports on a 'virtual plot shop' website;
- Strive to achieve an excellent strategic long-term partnership.

The Council encourages Developers to bring forward multiple plots on large sites to be marketed and disposed of through the Partnership. Developers interested in joining the Partnership would have to sign up prior to the determination of the relevant planning application and signing of the legal agreement.

Developers and Enablers interested in joining the Partnership are advised to contact the Self-Build Officer for further details [SelfBuild@southglos.gov.uk](mailto:SelfBuild@southglos.gov.uk) .



## DELIVERING PLOTS ON LARGE RESIDENTIAL AND MIXED-USE DEVELOPMENT

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Policy PSP42, criteria 4 requires the following:

“4. Require developers to supply at least 5% of the total dwellings on residential and mixed-use sites of over 100 dwellings, for sale to self and custom builders, on the following sequential basis:

**Firstly;**

A. As self and/or custom house building serviced plots (that meet the definition of self-build and custom housebuilding plots within the Housing and Planning Act 2016 as amended or any subsequent amendment).

**Secondly;**

where it is demonstrated that it was not possible to deliver the self-build and/or custom housebuilding plots in accordance with A, above:

B. as shell homes”

Based on a need to meet local demand, criteria 9 of PSP42 sets out that “where custom build plots are provided under criteria 2, 4 and 5 of the policy, will expect dwellings to be no larger than 108sqm (gross internal floor space)”.

Criteria 5 ensures the Council can meet its duties to provide sufficient serviced plots on large residential and mixed-use developments of 100 dwellings or more.

Consistent with the Right to Build, ‘local requirements’ is taken to mean demand across the whole district, as shown on the Council’s register or any other market research they have available.

It is good practice for developers to provide a mix of serviced plot sizes to meet the range of demand and affordability, subject to site-specific negotiations and the nature of the proposed development. There is scope for a mix of plot sizes, as long as this relates to the demand identified on the Council’s register (Part 1 and Part 2). This it to ensure that CSB plots secured through PSP42 cater to the variety of aspiring self-builders, including first-time buyers, middle-income earners, downsizers and other specialist groups. Supplying a mix of plot sizes also plays an important part in enabling the delivery of housing to specialist groups.

It is advised that the developer engages with the Council at the earliest opportunity to clarify the local demand requirements for serviced plots, preferably prior to the submission of a pre-application enquiry or planning application. Enablers/developers may find it helpful if data on local demand were available earlier in the process to assist in their site selection process, prior to the pre-application stage. If this is the case, enablers/developers should contact the Council's Self-build Officer for data for a specific location or area. This will ensure that pre-application enquiries and planning applications which involve self and custom build housing include this provision during the early stages of the proposal. The register can provide information based on the local need for plot sizes and locations which will ensure the best mix (i.e. size and type) of serviced plots and an optimal layout is achieved on the proposed development. New development can help to reduce greenhouse gas emissions, such as through its location, orientation and design, for example, optimising solar technology through the orientation of plots and dwellings. Large plots will inevitably have a higher sales value than smaller ones, so if there is a lot of demand for low cost plots then there needs to be provision of some more affordable, compact-sized plots.

The developer will be required to enter into a condition and legal agreement that agrees the number of plots required, their general location, and the phasing and timing of delivery. A self-build phasing plan will be required showing the location of the self-build plots including any access works to be approved by the Council prior to commencement. The self-build phasing plan should show each plot for self and custom build (each plot phased separately) and any necessary access works.

On larger developments (100+ dwellings), to ensure the demand for serviced plots is met in a timely manner the legal agreement will likely include a clause to ensure the delivery of serviced plots when no more than 50% of market housing has been delivered on site.

The Council will expect developers to submit details on the number of custom-build plots together with a plan identifying the precise boundaries, indicative location, the Delivery Statement, Marketing Strategy, and Plot Passports.

The Council will expect self-build plots to be delivered in the early phases of the development, once the initial infrastructure and services have been installed on site. However, the Council will take into account the proposed location of the plots within the development and the phasing of the surrounding development.

We recommend that plots are carefully selected to ensure they can be serviced in an agreed specified period in the construction programme and are attractive to prospective self and custom housebuilders. The delivery of self and custom build plots in the early phases of the development is key to maximising the marketing opportunities of plots.

## SEQUENTIAL BASIS

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The provision of serviced plots on larger developments (criteria 5) is provided on a sequential basis. This is to ensure a degree of flexibility to developers of sites “where it is demonstrated that it was not possible to deliver the self-build and/or custom housebuilding plots” (policy PSP42, criteria 4, ii). Should the developer find that it is not possible to deliver self-build or custom build plots on a larger site, in accordance with the act, evidence demonstrating the justification for providing “Shell Homes” as an alternative should be provided to the Council for further consideration. The fall-back position being the provision of “Shell Homes” on site rather than self and custom build plot provision on site.

A “Shell Home” shall mean a Dwelling on a Custom-build Plot with a target average GIA of 108 square metres (whereby the Council may otherwise approve a range of Dwelling sizes with acceptable GIA through the submission and approval of Plots Passports pursuant to paragraph 2.3) which is to be built to a shell and commissioned by Eligible Purchaser (as per the definition included in a standard S106 agreement). It is important to refer to the Right to Build definition of a self and custom build dwelling in order for the “Shell Home” to count towards self and custom build plot provision.

Developers may offer options and packages for completion of the “Shell Home” but purchasers should not be tied into the use of such services as a condition for sale. Options that offer prospective purchasers involvement in customising external appearance (where appropriate), internal arrangements and sustainability credentials are also encouraged. In order for plot purchasers of “Shell Homes” to benefit from CIL relief, this can be done as part of the sale of the plot. In the case of a “Shell Home”, it would need to be done before any construction work begins on the “Shell Home”.

The affordable housing requirement (Core Strategy Policy CS18) should be calculated on 100% of the unit numbers, including the self-build element.

## ACHIEVING QUALITY DESIGN

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Self and custom build housing provide a greater opportunity to create exciting and unique developments, offering a greater variety of housing design and types, as well as providing new communities.

The Council will ensure high quality design is achieved by assessing self and custom build homes against Local Plan policies PSP6 and PSP42 (PSP Plan), and CS1 (Core Strategy), and the forthcoming New Local Plan. Reference should also be made to the Green Infrastructure (GI) SPD, which encompasses the natural environment assets of a site to maximise their benefits through integrated site planning, with good design being the key to this integrated approach to land use. The aim of GI is to manage the many, often conflicting pressures for housing, industry, transport, energy, agriculture, nature conservation, recreation and aesthetics.

Achieving high quality design that responds to climate change is a very important consideration that is embedded in the design and construction of new housing. Homes within South Gloucestershire generate approximately one third of Districts CO<sub>2</sub> emissions due to, in part, their inefficiency. Therefore, it is essential that new homes are built to high energy efficiency standards, and are encouraged to be 'net zero carbon'.

In order to achieve a net zero carbon building, a building that uses very little energy is essential. Therefore building to recognised sustainable design standards through schemes such as [PassivHaus \(Home \(passivhaustrust.org.uk\)\)](https://passivhaustrust.org.uk) or [Passivhaus Institut \(passivehouse.com\)](https://passivehouse.com). Passivhaus focuses primarily on energy efficiency but results in inherently low-carbon buildings. Overall, Passivhaus is about building healthy, climate resilient buildings for the health and wellbeing of people and planet. The [Climate Emergency Design Guidance](#) also provides a useful illustration of how small scale housing (page 26 of the above guide) aims to help to define 'good' and to set clear and achievable targets (refer to Appendix 3). Part L of the Building Regulations require a minimum standard of energy efficiency, however, the Council strongly encourages homeowners to strive to achieve standards beyond these minimum levels, so that the significant benefits of reducing energy consumption is maximised along with increasing the comfort of the home through better temperature control and air quality.

The energy efficiency of a home is determined by a range of factors including orientation, insulation, materials, fenestration and the addition of renewable energy technologies, such as photovoltaic or solar thermal panels and heat pumps.

Other areas for consideration include: -

- Air tightness;
- Ventilation, including opportunities for heat recovery;
- Insulation including floors, walls, ceilings, roofs, windows and doors;
- Embodied energy in the construction materials;
- Battery storage and opportunities to install solar panels to generate electricity;
- EV charging infrastructure;
- Solar thermal for hot water and the potential for space heating support;
- Enhancing passive solar gain through appropriate glazing while avoiding the potential for overheating;
- Low Carbon Heating in the form of air source and ground source heat pumps;
- Lighting

Energy efficient development, and renewable and low carbon sources of energy technologies in the form of a 'Sustainability Checklist' should be incorporated in the Design Code (see below section for more information) to satisfy all parties that the development will achieve design quality.

The layout of a site is very important. It can ensure the installation of services is most cost effective and the delivery of attractive plots that will sell quickly and at market prices. Overall, the Council would encourage design codes consider how to best minimise energy demand through passive design and how orientation can help control solar gains and maximise daylighting.



## USE OF DESIGN CODES

Design codes are a set of written and illustrated rules that establish the design parameters of a particular development. National policy and guidance proactively encourages and sets the framework for the use of Design Codes. The NPPF asks local planning authorities to use Design Codes where they could help deliver high quality outcomes (Para.59). Design Codes should clearly set out what form of development is pre-approved in response to an agreed design vision for a site. They should not attempt to impose architectural styles or particular tastes and they should not stifle innovation, originality or initiative through unsubstantiated requirements to conform to certain development forms or styles (NPPF, Para. 60). They ensure high quality design and provide clarity at marketing stage.

Theme	Example of parameters that may be agreed within a Design Code	
1	Plot form	Eg: Plot size and plot width
2	Building forms	Eg: Bulk, massing, height, storey heights
3	Building orientation	Eg: Orientation towards the sun, position on plot, overlooking, natural surveillance
4	Density	Eg: Site coverage, dwellings per hectare, plot ratios, higher or lower density nodes
5	Developable footprint	Eg: Maximum proportion of plot that may be developed; parameters of dwelling position on plot
6	Building lines	Eg: Frontage continuity, roof-line parameters, set backs, boundary treatments
7	Building types	Eg: Detached, semi-detached, terraced / town house, flats
8	Street network	Eg: Urban grain - Street and building pattern and connectivity
9	Views and vistas	Eg: Relationship to heritage assets, topography, corridors and backdrops
10	Soft landscape	Eg: Standards, species planted, biodiversity, lawns and verges, planters
11	Building frontage	Eg: Active frontage, frequency of building features such as windows and entrances, architectural styles, features, proportions, materials, colours, balconies, porches
12	Townscape features	Eg: Eave lines, rooflines, chimneys, corner treatments, focal points, advertising
13	Street trees	Eg: Species, numbers, placements
14	Parking standards	Eg: On-street and off-street, on-plot parking courtyard parking treatments, overlooking lighting
15	Waste facility	Eg: Refuse and recycling bin storage, composting
16	Infrastructure	Eg: Community energy facilities such as combined heat

**Figure 7:** The parameters that could be addressed within quantifiable parameters by a Design Code, although this may vary depending on the level of detail required (table taken from the Teignbridge District Council's Custom & Self Build Housing Supplementary Planning Document, adopted July 2016).

Design codes are particularly useful for larger multi-plot developments involving more than ten homes and/or self and custom build schemes that may impact on more 'design' sensitive locations, such as conservation areas or the setting of listed buildings. They should not generally be overly prescriptive and should allow for design variation, creativity, innovation and originality. An example of a Design Code summary from the Trevenson Park South (Heartlands) development in Cornwall ([Part 1](#) and [Part 2](#)) can be found at Appendix 4. This development of 54no. Custom Build homes has been designed by developer Carillion-igloo. The Trevenson Park South Design Code supports the project and it was developed in consultation with Cornwall Council, English Heritage and UNESCO, and the six home manufacturers that will build the homes.

Design details should be applied via reserved matters to be determined by the occupants, or if necessary, through a variation to a planning application.

We would encourage a Design Code to accompany the whole self-build element of larger schemes, to be agreed between the developer and the Council. This will help to steer and guide what forms of development are acceptable on a site, giving greater clarity to all parties. Codes should include site, plot layout / build line, relationship to the street, scale, boundary treatments, parking and only where necessary appearance parameters.

Design codes should consider how to minimise energy demand through Passivhaus design, orientation, layout and glazing placement in order to help control solar gains and maximise daylighting.

A 'Sustainability Checklist' (below) should be included in the design code:

1. Orientation and geometry of building (form factor);
2. Fenestration – are windows positioned in suitable locations to optimise natural light? Is the glazing appropriate to enhance passive solar gain whilst avoiding the potential for overheating? Overheating can be avoided whilst optimising solar gain, e.g. through planting where foliage obscures summer sun e.g. through the addition of 'brise-soleil';
3. Ventilation - including opportunities for heat recovery;
4. Materials – embodied energy in the construction materials;
5. Air tightness and thermal bridging;
6. Insulation including floors, walls, ceilings, roofs, windows and doors;
7. Opportunities to install solar panels to generate electricity;

8. Renewable energy technologies, such as photovoltaic or solar thermal panels and heat pumps. Solar thermal for hot water and the potential for space heating support. Low Carbon Heating in the form of air source and ground source heat pumps;
9. EV charging infrastructure;
10. Lighting.

## PLOT PASSPORTS

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'Plot Passports' have a role to play alongside Design Codes. They are simple summaries of the design parameters for each plot capturing the relevant information from the Design Code, planning permission and Delivery Statement.

The use of Plot Passports are helpful where the developer allows buyers to build their own homes on serviced plots without a design and build contract. They are not normally needed where a Custom Build developer manages the build out of a site and homes are built for the homeowner to complete themselves or built to their specification, ready to move in. This includes community-led housing that do not involve serviced plots for sale to the public.

Plot Passports act as a key reference point for prospective purchasers and should form part of the marketing material available for each custom build plot to help private homebuilders to understand what they can build on a plot.

Reserved Matters applications from self-builders which fall within the plot passport guidance can be processed in less time and can help speed up the planning process.

Each passport should clearly show the plot location, back-to-back distances, permissible building lines, scale, servicing and utilities, building height restrictions, plot size and Gross Internal Area parameters, proximity to neighbouring buildings, developable footprint, boundary treatments, parking and cycle storage, and side space requirements.

**Passports should be clear about the number dwellings that can be built (generally only one) as well as car parking and access location etc. The choice of finishing materials, fenestration and roof shape is usually left to the plot owner. [This is a link to an example of a typical plot passport used for plots at Graven Hill, Bicester](#) (refer to Appendix 5).**

## SERVICING PLOTS AND UTILITIES

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Serviced building plots are shovel-ready parcels of land with planning permission, laid out and ready for construction with access and utilities/ services provided to the plot boundary.

The Council expects plots to be sold with outline planning permission, the basic infrastructure and minimum service connections to qualify as a “Serviced Plot” (defined as a parcel of land with legal access to a public highway, and at least water, foul drainage and electricity supply available at the plot boundary).

It should be noted that the definition of a serviced plot of land as set out in the Housing and Planning Act 2016 (9) (4), means a plot of land that -

- (a) has access to a public highway and has connections for electricity, water and waste water, or
- (b) can be provided with those things in specified circumstances or within a specified period.

Self and custom build plots should be provided in a serviced condition with all the reasonably necessary service connections. This is also included as a standard clause in our section 106 agreement.

All reasonably necessary service connections should be provided to the boundary including being accessible by road of an adoptable standard and utility services to adoptable standards by the relevant statutory undertaker, as standard.

The installation of utilities usually includes the most common ones; water and sewage connections, electricity and telecommunications. Each utility is normally provided to a disconnected chamber on or just within the boundary of each plot (for example electricity connections provided to fuse boxes on stakes and water connections provided to a man-hole in the pavement).

Connections should be clearly identified and labels should not use short-hand. Careful consideration of the locations of the connections is required so that they are kept out of the way of construction traffic.

### Utility supply features

#### Electricity

230V Single Phase, 50Hz AC  
100A/23kVA Supply Rating Max

#### Gas

25mm PE LP Pipe, 30kW Supply Rating Max.

#### Water

25mm ALPE Pipe with Meter, Stop Valve and Double Check Valve Standpipe,  
Min Pressure 8m Head, Approx

#### Telecoms

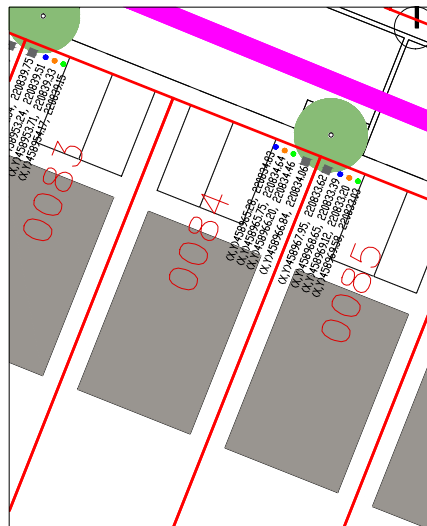
Fibre Service

#### Key

- Electricity Supply ■
- Gas Supply ●
- Water Supply ●
- Telecoms Supply ●
- Multi Utility Distribution Network ■

#### Co-ordinates

Co-ordinates indicate services intake position within site boundary



## Plot Boundary Service Connections

### 1 Electricity

The electricity supply terminates in a ground mounted enclosure, just inside plot boundary, housing a 100A fuse cut-out, a 100A DP RCBO, with space for the provision of a small distribution board and meter. MPAN number will be supplied to allow the purchaser to arrange for a meter to be installed. (refer to 'Arranging for your meter' section)

### 2 Gas

The gas supply will require extension directly from the gas main in the road to the meter position in a built in or wall mounted meter box once the meter box has been installed on the building. The service pipe must be laid in a straight line between the connection to the main and the meter position. The proposed service pipe location is shown within the diagram above, any changes to this position must be provided to GTC as part of the Golden Brick design. Any subsequent variation to this location may incur additional cost to the self-build purchaser.

### 3 Water

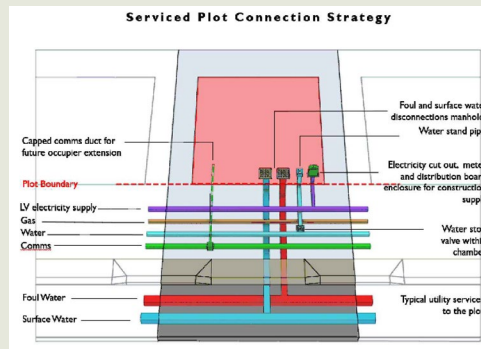
The water supply terminates at a double check valve and standpipe, just inside plot boundary, with meter and stop valve chamber in footway.

### 4 Telecoms

The telecoms provision terminates with a cable duct, at the plot boundary.

### 5 Drainage

Refer to 'Drainage' under separate passport.



**Figure 8:** An example of the services provision for the self and custom build plots at the Graven Hill site near Bicester. This key information forms part of the Plot Passport.

Bond payments can be required from plot purchasers to the developer to ensure that any damage to the road and kerbs during construction can be recouped, the bond can be extended to cover the whole self-build site, for example to repair accidental damage. Bonds can encourage honesty, as everyone's money is collectively at risk for any liabilities by individuals during construction and therefore assist both parties.

The requirements and value of any bonds should be reasonable with very clear terms and conditions to include when they can be spent, how much is required, how expenditure is agreed and when it is returnable. Clear guidance on the bond payment conditions should be set out for the prospective self-builder/plot purchaser.

## **MARKETING THE PLOTS**

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Self and custom build plots being delivered under policy PSP42 will be expected to be marketed in accordance with an agreed marketing strategy. The marketing strategy should be submitted to the Council and agreed prior to the commencement of any phase which includes custom-build plots. The strategy should set out how plots will be marketed to eligible purchasers, the use of plot passports, the method for valuing plots, the proposed terms and conditions for the sale and include the use of a reputable and experienced estate agent (to value and potentially market the plots).

A copy of the Council's draft s106 schedule for custom-build plots is included for reference in [Appendix 2](#).

The marketing of custom-build plots should not begin before they are safely accessible to the public on site and the boundaries are demarcated.



## 7. SELF-BUILD AS AFFORDABLE HOUSING

### AFFORDABLE SELF-BUILD HOUSING

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Policy PSP42 of the Policies, Sites and Places Plan (adopted November 2017) expands on the Council's approach to Self-build and Custom housebuilding in the district. Of most relevance are criteria 5 and 9 in relation to Affordable Housing:

Criterion 5 of PSP42 requires the developer to investigate whether it is viable to provide self and custom build plots on sites where the Council has agreed it is unviable to provide policy compliant S106 contributions (including Affordable Housing) if the Affordable Housing is consequently reduced to below 35% of the total dwellings and subsidy is not available to return the Affordable Housing to 35% of the total dwellings.

The Affordable Housing requirement (Core Strategy Policy CS18) should be calculated on 100% of the unit numbers, including the self-build element.

Criterion 9 proposes a target size for custom-build dwellings that may be delivered through routes 2, 4, 5, 6 and 7 in order to hold down the size and thereby value of plots of land, to make them more affordable for middle-income earners. Where custom build plots are provided on Council-owned land, large residential or mixed-use sites (100+ dwellings), the Council will expect dwellings to be no larger than 108sqm (gross internal floor space). However, it is recognised that the Council's Self-build Register shows strong demand for a greater mix of plot sizes. There is scope to provide a mix of plot sizes that meets the range of demand and affordability.

Self-build and Custom housebuilding are not normally regarded as Affordable Housing, although they can be delivered as Affordable Dwellings as long as they meet the definition of Affordable Housing at Annex 2 of the NPPF 2019. Further guidance on the delivery of Affordable Housing is set out in the Affordable Housing SPD.

The Council would welcome Affordable self-build units. However, it recognises the challenges that this creates and in this circumstance, would encourage Affordable dwellings to be delivered via a Registered Provider and contractor in the usual way.

Sites for 100% custom-build housing of 10 or more dwellings (or the site has an area of 0.5 Ha or more), or 5 or more dwellings in the Cotswold AONB), would be expected to deliver Affordable Housing units in accordance with Core Strategy Policy CS18.

### **The different forms of Affordable Housing that can be delivered through custom and self-build**

Self and custom build dwellings delivered as Affordable Housing must meet the definition contained in Annex 2 of the NPPF, which includes housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership, such as shared ownership, or housing for essential local workers). In general, Affordable Housing is sold or rented at a discount of at least 20% on market prices and rents and provided at a discount for future eligible households. Because of the restrictions and criteria for Affordable Housing, the involvement of a Registered Provider is recommended and required for rented accommodation.

The Council would welcome Affordable self-build units, however it recognises the challenges that this creates. In this circumstance, we would encourage Affordable dwellings to be delivered via a Registered Provider and contractor in the usual way.

Further detail is set out in the [Affordable Housing and Extra Care Housing SPD](#)

### **Application of the Council's Affordable Housing policy to larger sites and custom and self-build development**

On major developments, i.e. 10 dwellings or more or a site size of 0.5 Ha or above, policy CS18 requires an Affordable Housing contribution of 35%, of all units, including the CSB units, as well as the requirement for a proportion of CSB units. The presumption is that sites will be delivered viably in compliance with planning policy without any reduction in either requirement.

Criterion 5 of PSP42 requires the developer to investigate whether it is viable to provide self and custom build plots on sites where the Council has agreed it is unviable to provide policy compliant S106 contributions (including Affordable Housing) if the Affordable Housing is consequently reduced to below 35% of the total dwellings and subsidy is not available to return the Affordable Housing to 35% of the total dwellings.

## How the Council will apply Paragraph 64 of the NPPF when considering Affordable Housing and custom and self-build developments

Where a major development comprises only Self-build or Custom Housebuilding, there will be no requirement to provide 10% of the units for Affordable home ownership, in line with Paragraph 64 of the NPPF, although a 35% contribution of Affordable Housing would be required in line with policy CS18. The Council would welcome Affordable self-build units, however it recognises the challenges that this creates and will therefore welcome the Affordable Dwellings to be delivered via a Registered Provider and contractor in the usual way.

## The role of Community-Led Housing in delivering Affordable Housing

CLH is housing that is built, controlled and owned by the community.

Demonstrating CLH generates social value over and above other forms of housing development can help make the case for the release of public land for CLH and inform the valuation of such sites. Land valuations will need to take account of the viability profile of CLH development resulting in a price that makes it viable to deliver CLH.

The type of sites usually considered for CLH are those of little value to the authority, have development potential for perhaps a handful of units and are community-sensitive (often open space within existing estates). They tend to be the small, awkward, inefficient sites which are below the radar commercially but can often be just the sort of opportunity a CLT will take on.

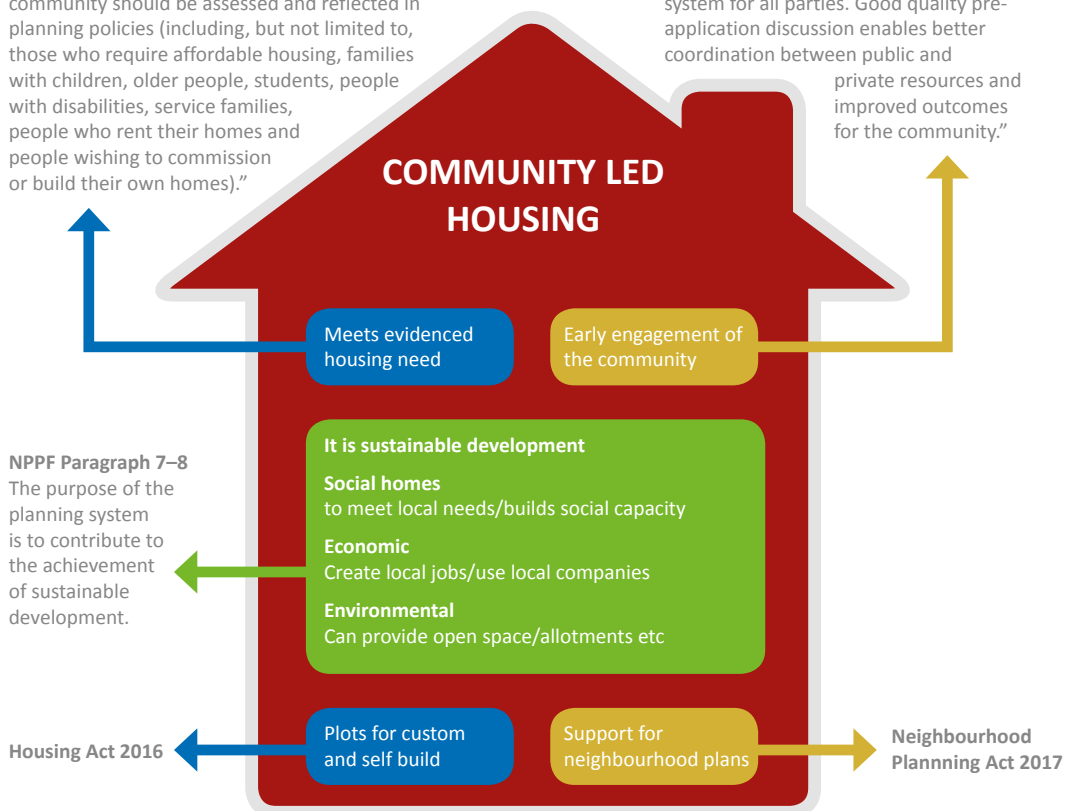
A guide developed for planners provides compelling reasons for including CLH, including in the assessment of potential sites – [A Planner's Guide to Community Led Housing](#) (prepared by Jo Lavis, June 2019). This guide also draws on various case studies, including a cohousing scheme on part of a large development on an allocated site and approved under Local Plan policy for Self and Custom Build in York and providing a Plan-Led Framework for Community-Led Housing through strategic Local Plan policy and development management practice in Cornwall, and more.

**“NPPF Paragraph 59 & NPPF Paragraph 61**

Within this context the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies (including, but not limited to, those who require affordable housing, families with children, older people, students, people with disabilities, service families, people who rent their homes and people wishing to commission or build their own homes).”

**“NPPF Paragraph 39**

Early engagement has significant potential to improve the efficiency and effectiveness of the planning application system for all parties. Good quality pre-application discussion enables better coordination between public and private resources and improved outcomes for the community.”



**NPPF Paragraph 7-8**

The purpose of the planning system is to contribute to the achievement of sustainable development.

Housing Act 2016

Neighbourhood Planning Act 2017

**Figure 9:** Image illustrates how CLH helps planners meet national policy requirements (NPPF) and statutory duties (the Housing Act 2016 and the Neighbourhood Planning Act 2017). (Diagram taken from ‘A Planner’s Guide to Community Led Housing’, page 12).

## 8. COMMUNITY INFRASTRUCTURE LEVY

### COMMUNITY INFRASTRUCTURE LEVY (CIL) EXEMPTIONS AND SELF-BUILD

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The Community Infrastructure Levy (CIL) is a charge per square metre levied on new development (such as new homes to fund infrastructure). South Gloucestershire Council introduced the levy on 1st August 2015.

**The Community Infrastructure Levy (Amendment) (England) Regulations 2019** currently exempt self and custom build homes from paying the charge. Under current Council policy CIL regulations provide for dwellings which are built or commissioned by individuals for their own occupation and as their principle home for a minimum of three years, are exempt from paying CIL. Phasing in the planning permission is important because the CIL regulations require it in order to allow developers to take the benefit of the phasing provision in the regulations. Each self-build plot would need to be identified as an individual phase. If the planning permission is not phased then the commencement of the development will trigger the CIL attributable to the whole development.

In order to benefit from this exemption, self-builders must provide a self-build exemption claim (prior to commencement of development) and additional supporting evidence within 6 months of completion of the dwelling.

#### Who is liable to pay CIL?

CIL will be paid by the owner of land where CIL liable development is to be carried out, unless another party volunteers to pay the CIL by assuming the liability, e.g. the developer. Anyone who wishes to pay the CIL can come forward and assume CIL liability for the development. Where no one assumes liability to pay CIL, the liability will automatically default to the owners of the relevant land and payment becomes due immediately upon commencement of development. CIL is payable on all liable /chargeable development whether subject to a planning permission or not.

More information can be found on the Council's website and in the CIL SPD (adopted March 2015) <https://beta.southglos.gov.uk/community-infrastructure-levy-cil/>

## 9. APPENDICES

- [Appendix 1.](#) Copy of Self-build Delivery Statement
- [Appendix 2.](#) Example of a Self and Custom Build Housing Section 106 Agreement
- [Appendix 3.](#) Climate Emergency Design Guide – Small scale housing (LETI (London Energy Transformation Initiative))
- [Appendix 4.](#) Example of a Design Code summary ('Heartlands' @ Trevenon Park South, near Redruth, Cornwall – Design Code document, part 2)
- [Appendix 5.](#) Example of a Plot Passport (Graven Hill, Cherwell District Council)
- [Appendix 6.](#) Glossary
- [Appendix 7.](#) Policies, Sites and Places (adopted November 2017)  
– Policies PSP6 (page 19-20) and PSP42 (page 131-135)
- [Appendix 8.](#) Local Plan: Core Strategy (adopted December 2013)  
– CS1 (pages 32-37), CS3 (pages 451-43) and CS4 (pages 43-45)

# APPENDIX 1: DELIVERY STATEMENT FOR SELF-BUILD

The Delivery Statement is to ensure that self-build units are delivered onsite to meet the requirements of the [Self and Custom Housebuilding Act 2015 \(as amended by the Housing and Planning Act 2016\)](#). The self-build units must comply with the [Policies, Sites and Places Plan; Self and Custom Housebuilding \(PSP42\)](#), be delivered to an acceptable standard in the interests of the character and visual amenity of the area and in accordance with policy CS1 of the South Gloucestershire Local Plan Core Strategy (adopted December 2013).

## AIM OF THIS DOCUMENT

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This document is designed for developers to use as a template to set out the contents of their Delivery Statement, or to simply fill in the question boxes as part of their submission. This document includes a number of criteria which need to be covered in their submission for proposals involving self and custom-build housing, including windfalls or sites invoking policy PSP42 of the South Gloucestershire Local Plan: Policies, Sites and Places (adopted November 2017), which requires developers to provide at least 5% of the total dwellings on residential and mixed-use sites of over 100 dwellings. The criteria are designed to prompt the developer to consider matters, such as, how self-build projects are brought forward (i.e. which model), where the plots will be located, how do they meet the definition of self-build, and so on.

## SELF AND CUSTOM-BUILT HOMES

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Self and custom building can be described as any instance when a person is involved in some way in the production of their new home rather than buying from a speculative home builder. Self-build housing is where people physically build their home, sometimes with help from sub-contractors. The level of involvement can therefore vary greatly, from project management of the design and construction, undertaking all the building work to purchase of the site and appointment of a contractor. Such is the possible scope of involvement in the construction process by the eventual occupant, that the term custom-build is now also commonly used.



Custom build homes are self-build homes facilitated in some way by a developer, this still offers the opportunity of a unique home that suits the private home builder's needs, lifestyle and design preferences but through a more hands-off approach for the occupant than traditional self-build home. This option can mean a home commissioned by an individual and built by the developer, through to a group of homes, built by a developer, but with the offer of bespoke design for each individual.

Shell homes are permitted dwellings built to a shell and offered for sale at a point prior to second fix with the finishing design and fitting out commissioned by the purchaser. PSP42: Self and Custom Housebuilding (part 4 a and b) require the delivery of at least 5% of the total dwellings on residential and mixed use sites for sale to self and custom builders on a sequential basis firstly as serviced plots. Following the first marketing period, any unsold plots that are not possible to deliver as serviced plots can be delivered as shell homes through a second marketing period.

### **Community Infrastructure Levy (CIL) exemptions and self-build –**

It is worth noting that under current Council policy Community Infrastructure Levy (CIL) regulations provide for dwellings which are built or commissioned by individuals for their own occupation and as their principle home for a minimum of three years, are exempt from paying CIL. Phasing in the planning permission is important because the CIL regulations require it in order to allow developers to take the benefit of the phasing provision in the regulations. Each self-build plot would need to be identified as an individual phase. If the planning permission is not phased then the commencement of the development will trigger the CIL attributable to the whole development. More information on CIL can be found on our website [here](#).

## **MODELS**

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The models described below represent four generic ways that custom and self-build projects can be brought forward on sites where self-build plots are required through the Policies, Sites and Places Plan, self and Custom-build housing, PSP42. Each can be adapted to suit a particular site.

- a.** Sell plots to private homebuilders: Developer/land owner to provide building plots for self and custom-build. The plots are serviced, delivered and marketed by the developer (with the principle of planning permission already established) directly to individual private homebuilders through a reputable estate agent and to persons registered on the Council's self-build register. Private homebuilders are responsible for designing and building or commissioning the building of their home. During the second marketing period the developer may offer any unsold plots as shell homes.

- b.** Turnkey: Serviced plots are marketed directly to individual private homebuilders along with a design and build contract for a completed custom home to provide genuine bespoke and individual design to meet the customers need. These architect led homes will offer a complete service and will include designing the home, sourcing the materials, arranging labor and the build to completion. During the second marketing period any unsold plots may be offered as shell homes.
- c.** Sell land to Enabler: Developer/land owner to sell the self-build land to a third party such as a self-build enabler who will be responsible for servicing, delivering and marketing the plots directly to individual private homebuilders through a reputable estate agent and to persons registered on the Council's self-build register. The self-build enabler may sell the plots to private homebuilders to design and build or commission their own home, they may also provide design and build contracts to meet the private homebuilders' individual design. During the second marketing period any unsold plots may be offered as shell homes.
- d.** Partnership with enabler: Developer works with a third party such as a self-build enabler to provide serviced building plots for self or custom-building. The plots are delivered and sold by the third party or developer (with the principle of planning permission already established) directly to individual private homebuilders through a reputable estate agent and to persons registered on the Council's self-build register. The self-build enabler may sell the plots to private homebuilders to design and build or commission their own home, they may also provide design and build contracts to meet the private homebuilders' individual design. During the second marketing period unsold plots may be offered as shell homes.

**1. What model will be followed in order to deliver self and custom-build housing?**

**Please confirm below - a, b, c or d?**

## Self and Custom Build Definition

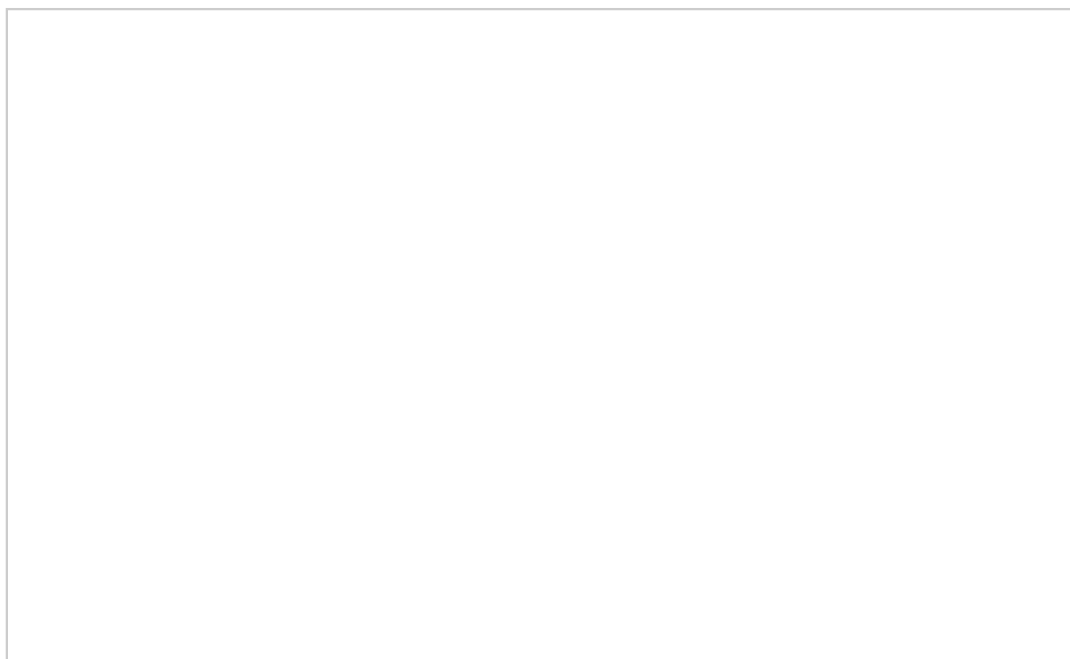
The Self-build and Custom Housebuilding Act 2015 defines self-build and custom housebuilding as, *'the building or completion by:*

- a) *Individuals*
- b) *Associations of individuals, or*
- c) *Persons working with or for individuals or associations of individuals, of houses to be occupied as homes by those individuals, but does not include the building of a house on a plot acquired from a person who builds the house wholly or mainly to plans or specifications decided or offered by that person'.*

The Act does not distinguish between self-build and custom housebuilding and provides that both are where an individual, association of individuals, or persons working with or for individuals or associations of individuals, build or complete houses to be occupied as homes by those individuals.

In considering whether a home is a self or custom build home, South Gloucestershire Council must be satisfied that the initial owner of the home will have primary input into its final design and layout. The Self and Custom Housing Act (2015) requires Councils to keep a register of individuals and associations of individuals who are seeking to acquire serviced plots of land in the area and grant suitable development permission to enough suitable serviced plots of land to meet demand demonstrated through the self-build register.

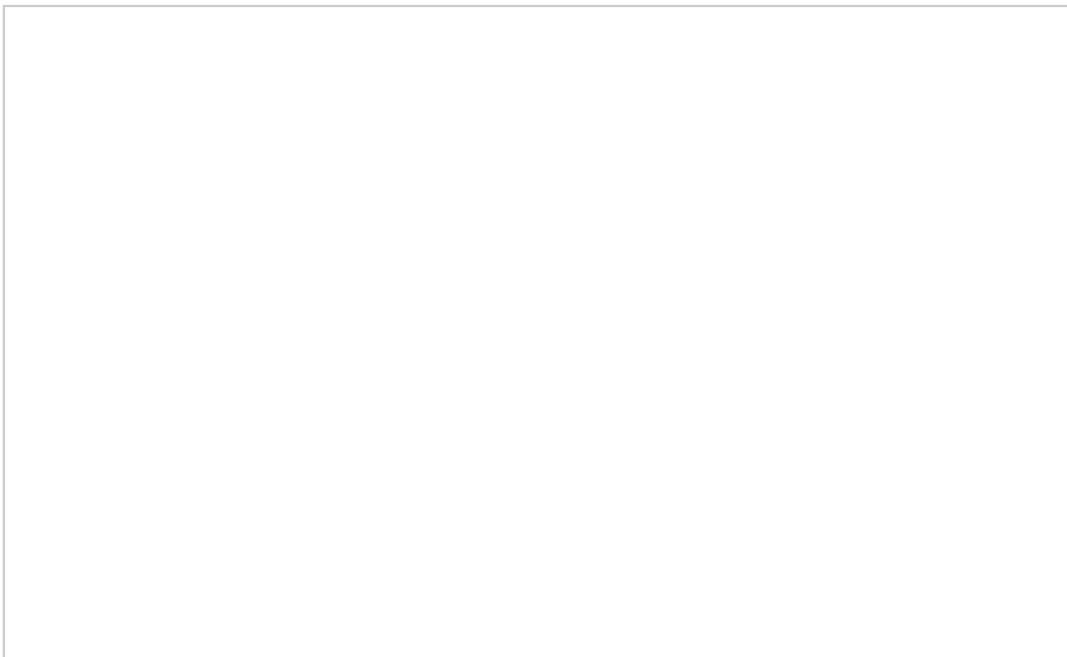
## 2. How does the proposed model fulfil the Housing and Planning Act's (2016) definition of self-build and custom housebuilding?



## Location

Plots should be carefully selected to ensure that they can be serviced in an agreed specified period in the construction programme and are attractive to prospective self and custom house builders. Plot sizes should be realistic to make them attractive propositions, they should be clustered together, easily serviceable and in an attractive location not encumbered by significant constraints such as trees, slopes and free from flood risks. There should not be services or rights of way crossing the land and the boundaries should be clearly marked out. Plots should benefit from easy access directly to the plot to facilitate the delivery of bulky materials.

### 3) Where will the plots be located? Please attached a proposed layout plan.



## Servicing plots

Serviced building plots are shovel-ready parcels of land with planning permission, laid out and ready for construction with access and utilities/ services provided to the plot boundary. Private home-builders can just purchase a plot or select from an extensive menu of options offered by developers/builders.

A serviced plot of land means a plot to which all reasonably necessary service connections have been provided to the boundary including being accessible by road of an adoptable standard and utility services to adoptable standards by the relevant statutory undertaker.

Installing utilities: there are usually four common utility connections; water and sewage connections, electricity, gas and telecoms. Each utility is normally provided to a disconnected chamber on or just within the boundary of each plot (for example electricity connections provided to fuse boxes on stakes and water connections provided to a man-hole in the pavement). Connections should be clearly identified and labels should not use short-hand. Careful consideration of the locations of the connections is required so that they are kept out of the way of construction traffic.

### **Phasing**

On larger sites, the Council will expect the early delivery of parcels of self-build plots. The Council will work with developers to understand any challenges to the early phasing and release of the self-build element of developments. It is important that developers consider early on the timing of the servicing and provision of the plots as this is an important aspect of their delivery. On larger sites, this will be dealt with via S106 Agreement. On smaller scale projects, this may more simply be dealt with via planning conditions.

#### **4) Who will be responsible for connecting to or extending the utilities to each home?**

#### **5) What fences or boundary treatments will be required and who is responsible for installing them (and by when)?**

#### **6) What remediation is required for each plot and how will this be delivered?**

**7) Will there be any shared maintenance areas or communal areas and who will be responsible for this?**

**8) Access roads: At what point will the surface course of the access road be laid?**

**9) What obligation is there to complete works to the access road (mortgage providers for serviced plots may require evidence of the landowners obligation to complete the works so it may be necessary to sell the plots with a copy of the infrastructure contract)?**

**10) Please describe the proposed estimated timing of the servicing and provision of the self-build plots.**

## BOND PAYMENTS

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Bond payments can be required from plot purchasers to ensure that any damage to the road and kerbs during construction can be recouped, the bond can be extended to cover the whole self-build site, for example to repair accidental damage. Bonds can encourage honesty, as everyone's money is collectively at risk for any liabilities by individuals during construction and therefore assist both parties. The requirements and value of any bonds should be reasonable with very clear terms and conditions to include when they can be spent, how much is required, how expenditure is agreed and when it is returnable. Clear guidance for the self-build is required to set these conditions out.

### **11) Will private self-builders be required to provide a bond payment to the master developer to cover any damage to public areas the development?**

## DESIGN CODE

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National policy and guidance proactively encourages and sets the framework for the use of Design Codes, including their use for private homebuilding projects to clearly set out what form of development is pre-approved in response to an agreed design vision for a site. This will ensure that individually designed homes will fit into the surrounding area.

Design codes can thus play an important role on private homebuilding sites. They reduce risk, provide certainty, drive up design quality and give the private homebuyer the flexibility to design their own home by permitting freedom of design with some high level rules. Design codes are particularly useful for larger multi-plot developments involving more than ten homes and/or self and custom build schemes that may impact on more 'design' sensitive locations such as conservation areas or the setting of listed buildings. They should not generally be overly prescriptive and should allow for design variation, creativity, innovation and originality. The amount of prescription will vary according to the sensitivity of the site. They should specify what is mandatory and what is optional. Where possible they should be style neutral so they can deliver contemporary or traditional architecture and they should allow for advanced methods of construction.



Design codes should consist of written and graphic rules that establish, with some precision, the two and three dimensional design elements of a proposed development. Key design considerations typically focus on the site/plot and the acceptable form of development (for example scale, massing, height, build line & layout, boundary treatments and landscaping). Codes can define process considerations (for example how construction traffic will be controlled, plant and material storage). An article from the Right to Build Toolkit gives further information on the storage of building materials. See [Storage of Build Materials and other on-plot considerations](#).

## 12) Please provide details of the Design Code for the self-build plots.

## PLOT PASSPORTS

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Plot passports are a simple way of helping private homebuilders to understand what they can build on their plot. Plot passports are simple summaries of the design parameters for each plot capturing relevant information from the Design Code, planning permission and Delivery Statement. They are short documents specific to each plot and form part of the marketing materials available for each plot. They act as a key reference point for prospective purchasers and form part of the marketing material available for each custom build plot to help private homebuilders to understand what they can build on a plot. They add value and certainty by acting as a key reference point for the purchaser, capturing relevant information from the planning permission, design constraints and procedural requirements in a concise and accessible format.

Plot passports are required for approval before commencement of those phases which include plots for private homebuilding. They can help speed up the planning process; RM applications from self-builders which fall within the plot passport guidance can be processed in less time. Each passport should clearly show the plot location, permissible building lines and side spacing, proximity constraints to neighboring buildings, the developable footprint and building height restriction. Passports should be clear about the number dwellings that can be built (generally only one) as well as car parking and access location etc. The choice of finishing materials, fenestration and roof shape is usually left to the plot owner. This is a link to an example of a typical plot passport used for plots at Graven Hill, Bicester.

### 13) Please provide details of your Plot Passports

## APPENDIX 2: **EXAMPLE OF A SELF AND CUSTOM BUILD HOUSING SECTION 106 AGREEMENT**

### **PART 1: DEFINITIONS RELATING TO SELF AND CUSTOM BUILD HOUSING**

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- 1.1** "Custom-build Dwelling" shall mean a Dwelling on a Custom-build Plot with a target average GIA of 108 square metres (whereby the Council may otherwise approve a range of Dwelling sizes with acceptable GIA through the submission and approval of Plot Passports pursuant to paragraph 2.1.5) which meets the definition in section 1 (A1) and (A2) of the Self-Build and Custom Housing Act 2015 (as amended) and which is commissioned by an Eligible Purchaser
- 1.2** "Custom-build Plot" shall mean a plot within the Land for the construction of a Custom-build Dwelling or Shell Home (as the case may be)
- 1.3** "Delivery Statement" shall mean the programme for delivering the Custom-build Plots to a Serviced Condition and Remediated Condition including details of access, servicing, infrastructure, subdivision and boundary treatment and how the delivery of Custom-build Plots will meet the definitions of:-
- 1.3.1** "self-build and custom housebuilding" in section 1 (A1) and (A2) of the Self-Build and Custom Housing Act 2015 (as amended) and
  - 1.3.2** "serviced plots of land" in section 5 of the Self-Build and Custom Housing Act 2015 (as amended)
- 1.4** "Design Code" shall mean the design code or design brief setting out the subdivision of plots, building line, scale, boundary treatments, parking, the plots relationship to the street, the Sustainability Checklist and only where necessary appearance parameters of the Custom-build Dwellings
- 1.5** "Eligible Purchasers" shall mean Part 1 Registered Eligible Purchasers Part 2 Registered Eligible Purchasers and Other Eligible Purchasers

- 1.6 "First Marketing Period" shall mean a period of not less than twelve (12) months which shall commence no earlier than the date on which the Custom-build Plots are available for immediate purchase
- 1.7 "Marketed Appropriately" shall mean:-
- 1.7.1 in the case of the First Marketing Period, marketing and using reasonable endeavours to enter into contracts to sell the relevant Custom-build Plot as a Custom-build Dwelling or Shell Home as appropriate in accordance with the approved Marketing Strategy including through the use of the approved Plot Passport for no more than open market value
  - 1.7.2 in the case of the Second Marketing Period, marketing and using reasonable endeavours to enter into contracts to sell the relevant Custom-build Plot either as a Custom-build Dwelling or a Shell Home in accordance with the approved Marketing Strategy for no more than open market value in each case such open market value to be established through independent valuation (at the cost of the Owner) where such independent valuation is requested in writing by the Council
- 1.8 "Marketing Strategy" shall mean a strategy for the marketing of the Custom-build Plots incorporating the Site Wide Marketing Principles and including all of the following:-
- 1.8.1 a strategy for marketing the Custom-build Plots to Eligible Purchasers during the First Marketing Period and the Second Marketing Period (if applicable)
  - 1.8.2 the method for valuing Custom-build Plots to ensure that the price at which Custom-build Plots are marketed does not exceed open market value and such method may include the need to re-agree the valuation of the Custom-build Plots during the Second Marketing Period, with an option to re-size some or all of the Custom-build Plots depending on customer interest from the First Marketing Period.
  - 1.8.3 the proposed terms and conditions of the sale of the Custom-build Plots including any bond payments between the Eligible Purchaser and the Owner and details of when services will become connected

- 1.8.5** the use of the Register when marketing the Custom-build Plots to Part 1 Registered Eligible Purchasers and Part 2 Registered Purchasers and the provision of Plot Passports specific to each Custom-build Plot which will be made accessible through the Register and
- 1.8.6** the use of a reputable and experienced estate agent when marketing the Custom-build Plots to Other Eligible Purchasers
- 1.9** "Non-Custom-build Dwelling" shall mean a Dwelling which is not constructed on a Custom-build Plot
- 1.10** "Other Eligible Purchaser" shall mean an individual (or an association of individuals as the case may be) who intends to construct or commission construction of a Custom-build Dwelling or Shell Home (as the case may be) for its own use and who intends to live in the Custom-build Dwelling or Shell Home (as the case may be) for a minimum of three years but who is not registered on the Register
- 1.11** "Part 1 Registered Eligible Purchaser" shall mean an individual or an association of individuals who is registered on Part 1 of the Register and who meets the local eligibility criteria
- 1.12** "Part 2 Registered Purchaser" shall mean an individual or an association of individuals who is registered on Part 2 of the Council's Register and who does not meet the local eligibility criteria

**1.13** "Plot Passport" shall mean a simple summary of the design parameters for each Custom-build Plot which acts as a key reference point for prospective purchasers/Occupants capturing relevant information from the Planning Permission, the Design Code and the Delivery Statement to form part of the marketing material available for each Custom-build Plot and which shall also include the following details as a minimum:-

- (a) plot location
- (b) back-to-back distances
- (c) plot size and Gross Internal Area ("GIA") parameters
- (d) scale
- (e) permissible building lines
- (f) side spacing requirements
- (g) building height restrictions
- (h) proximity restraints to neighbouring buildings
- (i) developable footprint
- (j) boundary treatments
- (k) servicing and utilities details
- (l) car parking and cycle storage
- (m) access location

**1.14** "Register" shall mean the register of people who are interested in custom build projects which is kept and maintained by the Council in accordance with its duties under the Self Build and Custom Housebuilding Act 2015 (as amended)

- 1.15** "Remediated Condition" shall mean remediation of the Custom-build Plot has been carried out in accordance with the mitigation works identified in the remediation strategy and verification strategy approved pursuant to the conditions of the Planning Permission
- 1.16** "Second Marketing Period" shall mean a period of not less than twelve (12) months for marketing a Custom-build Plot as either a Custom-build Dwelling or a Shell Home which shall commence following the expiry of the First Marketing Period if at that date there is no contract to sell the Custom-build Plot to an Eligible Purchaser
- 1.17** "Serviced Condition" shall mean the relevant Custom-build Plot meets the requirements set out in section 5 of the Self Build and Custom Housebuilding Act 2015 (as amended) and more particularly has all reasonably necessary service connections (including foul drainage, water, gas, electricity and telecommunications) provided to the boundary including being accessible by road of an adoptable standard and utility services to adoptable standards by the relevant statutory undertaker
- 1.18** "Shell Home" shall mean a Dwelling on a Custom-build Plot with a target average GIA of 108 square metres (whereby the Council may otherwise approve a range of Dwelling sizes with acceptable GIA through the submission and approval of Plots Passports pursuant to paragraph 2.3) which is to be built to a shell and commissioned by Eligible Purchaser
- 1.19** "Site Wide Marketing Principles" shall mean marketing the Custom-build Plots to Eligible Purchasers in the following order of priority:-
- 1.19.1** exclusively to Part 1 Registered Eligible Purchasers in the first two weeks of the First Marketing Period
  - 1.19.2** exclusively to Part 1 Registered Eligible Purchasers and Part 2 Registered Eligible Purchasers in the second two weeks of the First Marketing Period and
  - 1.19.3** thereafter to Part 1 Registered Eligible Purchasers, Part 2 Registered Eligible Purchasers and Other Eligible Purchasers



1.20 “Sustainability Checklist” shall mean a strategy for how the Custom-build Plots are to minimise energy demand and may include the following details:

- (a) Orientation and geometry of building (form factor)
- (b) Fenestration - positioning of windows and glazing of windows in suitable locations to optimise natural light and to avoid overheating
- (c) Ventilation - including opportunities for heat recovery
- (d) Materials – embodied energy in the construction materials
- (e) Air tightness and thermal bridging
- (f) Insulation including floors, walls, ceilings, roofs, windows and doors
- (g) Opportunities to install renewable energy technologies to generate electricity and to heat water
- (h) Electric vehicle charging infrastructure
- (i) Lighting

## PART 2 : COVENANTS RELATING TO SELF AND CUSTOM BUILD HOUSING

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The Owner covenants with the Council as follows:-

### Site-Wide Delivery of Custom-Build Plots

- 2.1 Not less than XX No. Custom-build Dwellings (or more if the Owner so elects) located across XX Phases shall be made available and marketed in accordance with the provisions of this Schedule.
- 2.2 For the avoidance of any doubt the Owner shall be entitled to transfer (freehold or long leasehold) any part(s) of the Land identified for the delivery of the number of Custom-build Plots referred to at paragraph 2.1 PROVIDED THAT such transfer(s) shall not prejudice the performance by the transferee of the obligations within this Schedule
- 2.3 Unless otherwise agreed in writing by the Council not to Commence Development until the following documents have been submitted to and approved in writing by the Council:-
  - 2.3.1 details of the number of Custom-build Plots to be made available together with a plan identifying the precise boundaries of the Custom-build Plots such plan to be approved in writing by the Council
  - 2.3.2 the Delivery Statement;
  - 2.3.3 the Design Code;
  - 2.3.4 the Marketing Strategy; and
  - 2.3.5 the Plot Passports for all of the Custom-build Plots.
- 2.4 From the date of Commencement of the Development to work proactively with the Council to raise the public's awareness of the future availability of Custom-build Plots and the likely timing of the Custom-build Plots being made available and marketed.

- 2.5 Not more than 50% of the Non-Custom-build Dwellings shall be first Occupied until 40% of the Custom-build Plots:-
- 2.3.1 are in a Serviced Condition;
  - 2.3.2 are in a Remediated Condition; and
  - 2.3.3 are being/have been Marketed Appropriately.
- 2.7 To deliver the Custom-build Plots to a Serviced Condition and Remediated Condition in accordance with the approved Delivery Statement.

### Marketing of Custom-Build Plots

- 2.8 Each Custom-build Plot shall be Marketed Appropriately during the First Marketing Period in accordance with an agreed Marketing Strategy.
- 2.9 The initial Occupant of any Custom-build Dwelling shall only be persons who will have a primary input into that Dwelling's final design and layout.
- 2.10 If the Owner is unable to contract to sell any Custom-build Plots as a Custom-build Dwelling to an Eligible Purchaser during the First Marketing Period then:-
- 2.10.1 that Custom-build Plot shall be made available and shall be Marketed Appropriately during the Second Marketing Period as either a Custom-build Dwelling or a Shell Home; and
  - 2.10.2 the Owner shall notify the Council in writing prior to commencement of the Second Marketing Period, and the Second Marketing Period shall not commence until such notice has been served on the Council.

PROVIDED THAT the Owner shall be under no obligation to construct any Shell Home until such time as there has been an exchange of contracts for the delivery and sale of that Shell Home.

- 2.11** Subject always to the provisions of paragraphs 2.13 and 2.14 of this Schedule, not to use the Custom-build Plots for any purpose other than the provision of Custom-build Dwellings or Shell Homes (as the case may be).
- 2.12** Where the Owner contracts to sell any Custom-build Plot as a Custom-build Dwelling or a Shell Home the Owner shall pay to the Council the sum which is 1% of the purchase price agreed for the Custom-build Plot and up to a maximum value of £1,000 per Custom-build Plot, such sum to be paid to the Council prior to the sale of such Custom-Build Plot.
- 2.13** If the Owner is unable to contract to sell any Custom-build Plot as a Custom-build Dwelling or a Shell Home once it has been Marketed Appropriately during the Second Marketing Period then the Owner shall:-
- 2.13.1** serve a written notice on the Director to that effect; and
  - 2.13.2** offer to sell the Custom-build Plot to the Council at open market value which offer shall remain valid and available for acceptance for a period of not less than three (3) months following the date of the offer.
- 2.14** If the Council accepts (in writing) the offer (at open market value) made pursuant to paragraph 2.13.2 the Owner will seek to agree with the Council a form of transfer of the Custom-build Plot and following such agreement will deliver a duly executed agreed form of transfer of the Custom-build Plot to the Council (or its nominee) incorporating such terms as to ensure that the Custom-build Plot is purchased from the Council (or its nominee) only by Eligible Purchasers and for no other purpose PROVIDED THAT where the agreed form of transfer has been released to the Council for completion but the Council fails to complete the transfer within 20 Working Days then the relevant Custom-build Plot(s) shall no longer be subject to the restrictions and obligations set out in this Schedule.
- 2.15** If the Council rejects the offer made pursuant to paragraph 2.13.2 or does not accept the offer in writing on or before expiry of the period set out in paragraph 2.13.2 then that Custom-build Plot shall no longer be subject to the restrictions and obligations set out in this Schedule.

# APPENDIX 3: CLIMATE EMERGENCY DESIGN GUIDE – SMALL SCALE HOUSING

## Operational energy

Implement the following indicative design measures:

### Fabric U-values (W/m<sup>2</sup>.K)

Walls	0.13 - 0.15
Floor	0.08 - 0.10
Roof	0.10 - 0.12
Exposed ceilings/floors	0.13 - 0.18
Windows	0.80 (triple glazing)
Doors	1.00

### Efficiency measures

Air tightness	<1 (m <sup>3</sup> /h. m <sup>2</sup> @50Pa)
Thermal bridging	0.04 (γ-value)
G-value of glass	0.6 - 0.5
MVHR	90% (efficiency) ≤2m (duct length from unit to external wall)

### Window areas guide (% of wall area)

North	10-15%
East	10-15%
South	20-25%
West	10-15%

Balance daylight and overheating

Include external shading

Include openable windows and cross ventilation

Reduce energy consumption to:



Reduce space heating demand to:



Maximise renewables so that 100% of annual energy requirement is generated on-site

Form factor of 1.7 - 2.5



## Heating and hot water

Implement the following measures:

**Fuel**  
Ensure heating and hot water generation is fossil fuel free

**Heating**  
Maximum 10 W/m<sup>2</sup> peak heat loss (including ventilation)

**Hot water**  
Maximum dead leg of 1 litre for hot water pipework  
'Green' Euro Water Label should be used for hot water outlets (e.g.: certified 6 L/min shower head – not using flow restrictors).

## Demand response

Implement the following measures to smooth energy demand and consumption:

**Peak reduction**  
Reduce heating and hot water peak energy demand

**Active demand response measures**  
Install heating set point control and thermal storage

**Electricity generation and storage**  
Consider battery storage

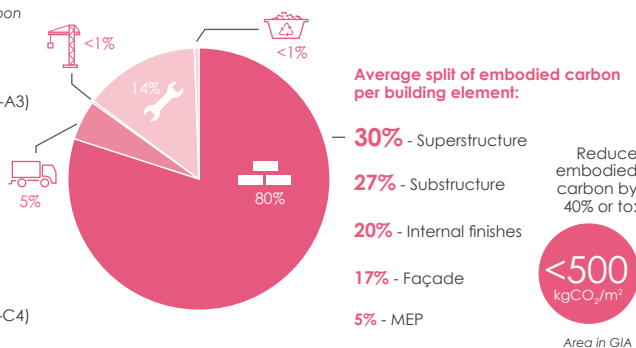
**Electric vehicle (EV) charging**  
Electric vehicle turn down

**Behaviour change**  
Incentives to reduce power consumption and peak grid constraints.

## Embodied carbon

Focus on reducing embodied carbon for the largest uses:

- Products/materials (A1-A3)
- Transport (A4)
- Construction (A5)
- Maintenance and replacements (B1-B5)
- End of life disposal (C1-C4)



## Data disclosure

Meter and disclose energy consumption as follows:

### Metering

1. Submeter renewables for energy generation
2. Submeter electric vehicle charging
3. Submeter heating fuel (e.g. heat pump consumption)
4. Continuously monitor with a smart meter
5. Consider monitoring internal temperatures
6. For multiple properties include a data logger alongside the smart meter to make data sharing possible.

### 123 Disclosure

1. Collect annual building energy consumption and generation
2. Aggregate average operational reporting e.g. by post code for anonymity or upstream meters
3. Collect water consumption meter readings
4. Upload five years of data to GLA and/or CarbonBuzz online platform
5. Consider uploading to Low Energy Building Database.



# Trevenson Park South, Cornwall

## Design Code

TPC-AR-102-REV A

Trevenson Park South,  
Cornwall

November 2014

Hybrid Application for  
Custom Build Housing  
Application and  
Detailed Application  
for Affordable Housing  
Led Mixed Residential  
Development





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Approved by: PM/CD

Trevenson Park South Design Code - Revision A

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# Trevenson Park South, Cornwall

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## Project Team

Carillion-Igloo



Coastline Housing



Homes & Communities Agency



HTA Design



# Trevenson Park South, Cornwall

## Executive Summary

### Context of the Design Code

The Design Code for Trevenson Park South Masterplan for the northern and southern parcels of land is to be read in conjunction with the Design and Access Statement, Masterplan Drawings and Planning Statement. The suite of documents comprehensively set out the context, analysis, design and realisation of the proposed development and interrelate to each other.

#### Reserved Matters Approval

Where a home design fully complies with the Design Code, Cornwall Council will deal with the reserved matters application in a positive manner with a view to recommending approval.

#### Permitted development rights

Subject to reserved matters:

- Where an applicant has utilised an element of the Design Code but not utilised it to its fullest extent (for example, volume) the applicant shall not be prevented from utilising the remainder at a later date, provided that it remains compliant with the overall parameters of the Design Code.
- Where an applicant has utilised an element of the Design Code to its fullest extent (for example, materials), the applicant shall not be prevented from amending the utilisation of this element (e.g. change to other materials within Design Code palette) at a later date provided that the amendment remains compliant with the overall parameters of the Design Code.

### General Notes

**The contents of the Trevenson Park South Design Code should be read in conjunction with the:**

- **Trevenson Park South Design & Access Statement (TPS-AR-101)**
- **Trevenson Park South Masterplan Drawings**
- **Trevenson Park South Planning Statement (by Tetlow King)**

**All designs must be compliant with:**

- **The requirements as stipulated within this Design Code**
- **The UK Building Regulation requirements in effect at the time of submission for approval.**
- **Secured by Design requirements**
- **Planning Conditions**
- **Plot Passport details**

**Variations:**

- **All variations to the requirements within this Design Code must be submitted as part of the Reserved Matters application to the local planning authority for approval.**

# Trevenson Park South, Cornwall

## Why a Design Code?

### Introduction

Carillion Igloo and Coastline Housing, working together with the Homes and Communities Agency, have developed high quality design proposals for a new mixed tenure neighbourhood to be delivered by way of two linked planning applications:

- A hybrid application by Carillion-Igloo for a Custom Build housing development.
- A detailed application by Coastline for an affordable housing led mixed residential development.

The applications are on the northern and southern parcels of land adjacent to the open space at Heartlands and form part of the phased regeneration of Trevenson Park South in Pool.

This Design Code accompanies the planning submissions for the masterplan and detailed elements of design and should be read in conjunction with the submitted drawings and reports. It has been developed in close collaboration between the design team and Cornwall Council officers through the pre-application process.

This Design Code augments the Trevenson Park South masterplan and builds upon the previous TRIP Design Codes and Public Realm Strategy (November 2009) prepared by Alan Baxter. The principal objectives of this Design Code is to describe and illustrate the plot parameters and standard of quality for the proposed Custom Build homes, along with key features of the wider masterplan to ensure continuity.

### Why Use a Design Code?

A Design Code is a proactive method of securing consistent high quality new development, and gives stakeholders, designers, developers, and contractors clear guidance on delivering sustainable places in a coordinated manner. This Design Code provides the Trevenson Park South masterplan with a site-specific benchmark and future reference manual for a range of architectural and landscape design issues.

Design Codes translate the aspirations and vision for a masterplan into deliverable and specific guidelines for the detailed design of individual homes. There are both urban design parameters and detailed specification items that have been discussed through the pre-application that feature in this design coding process.

Using Design Codes is not a new idea. They have been used throughout history, at some of the UK's most familiar developments, from the Georgian period through to Garden Villages and New Towns. The Government has supported the use of Design Codes in the delivery of higher quality sustainable communities, including through the National Planning Policy Framework (see accompanying Planning and Affordable Housing Statement). CABI has also published guidance on their use.

There are many recent UK examples of the use of Design Codes. Upton on the edge of Northampton adopted its own Design Code, and Poundbury in Dorset was also based upon a Code. Other places such as Milton Keynes, Basingstoke, Telford and Cambridge have all utilised Design Codes in the process of sustainable placemaking.

### Examples of projects where Design Coding has successfully been used



CABI Design Coding Document and National Planning Policy Framework



# Trevenson Park South, Cornwall

## Why a Design Code?

### What is the Purpose of this Design Code?

The hybrid application proposes Custom Build houses to be designed and built by Home Manufacturers on the northern parcel, working in close collaboration with their customers. Home Manufacturers are teams of designers and construction professionals who will work together to create unique house designs which are able to be customised and will be delivered as a complete built package to the customer.

The Design Code stipulates outline plot parameters for height, scale and massing, that have been developed in consultation with Cornwall Council and prospective Home Manufacturers. These Codes relate to specific frontages within the masterplan and have also been tailored to address the local heritage designations in terms of vistas, visual impact, and proximity to adjacent buildings. Other elements of the Custom Build neighbourhood have been coded to provide clear guidance to home manufacturers in terms of adjacent neighbouring plots, building projections, corners and end plots, cladding materials, colour palette, roofs, doors and windows. The detailed appearance of these houses will then be determined at a later date through a Reserved Matters application process, for which this Design Code will be a Material Consideration.

Wider elements of the masterplan across the northern and southern parcels, that form the detailed planning submission, are also prescribed by these Design Codes in order to ensure a consistent approach to detailing and boundary treatments. These are specifically coded features that ensure harmony and coherence of quality throughout Trevenson Park South. The quality and coherence of the masterplan's public realm and landscape features have been identified through the pre-application consultation process as a key unifying element to the masterplan.

The following section outlines how to use this Design Code, and throughout it has been clearly identified where individual Codes are to be applied within the masterplan and the extent of their designation.

### Examples of projects where Design Coding has successfully been used



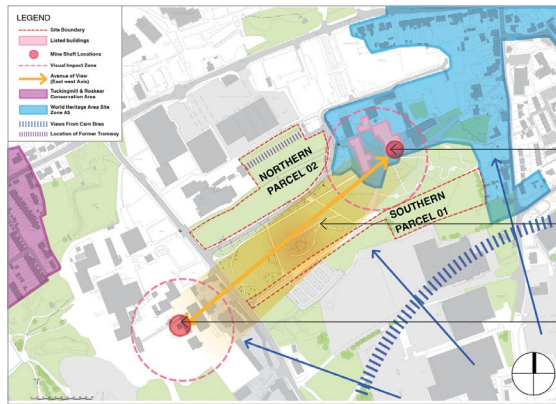
Example of a Home Manufacturer's brochure from the Almere custom build



# Trevenson Park South, Cornwall

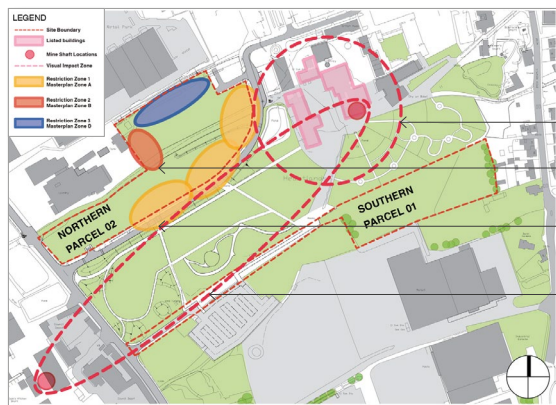
## Placemaking

### Placemaking: Analysis Diagrams from the Design and Access Statement



**Historical Analysis Plan** - historical and conservation zones and key views

- Heartlands mine shaft
- Avenue of view between the two mine shafts
- Tuckingmill mine shaft



**Historical Analysis Plan** - location of restriction zones to address historical and site constraints context

- Heartlands visual impact zone
- Zone B - adjacent to Laundry site
- Zone A - adjacent to visual impact zones
- Avenue of view visual impact zone



# Trevenson Park South, Cornwall

## Placemaking

### Placemaking

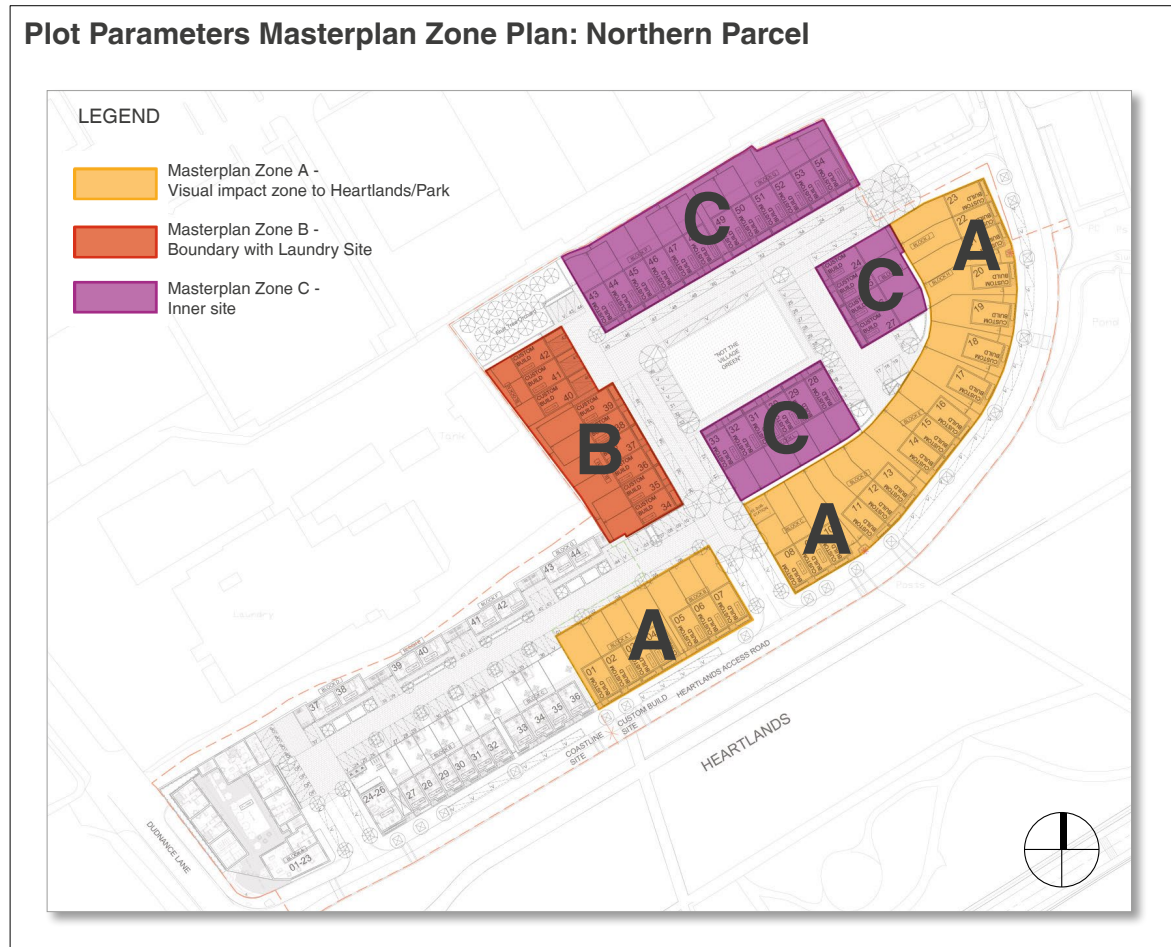
The site has a number of character areas due to the specific nature of the site and its proximity to key heritage features. The details of which are covered within the Trevenson Park South Design and Access Statement (TPS-AR-101) and the key diagrams from this document are shown opposite.

From the analysis of the character areas three distinct masterplan zones have been developed:

- **The visual impact zone to Heartlands/Park (Zone A)** - Various requirements imposed within the Design Code to respond to the prominent location in a heritage context;
- **The boundary zone with the laundry site (Zone B)** - Acoustic requirements imposed within the Design Code to respond to the proximity to adjacent Laundry;
- **The inner site zone (Zone C)** - Reduced restrictions in this zone;

Throughout the Design Code specific design code rules have been applied to different masterplan zones to respond to the character of this zone. These zones are shown on the diagram opposite.

Plot Parameters Masterplan Zone Plan: Northern Parcel



# Trevenson Park South, Cornwall

## How to Use The Code

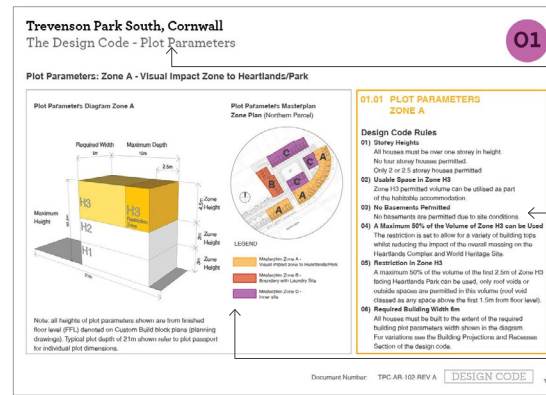
### Structure of the Code

The Design Code document is broken into two sections for clarity of use, the introduction section and the detailed Design Code section. Both sections of the document should also be read in conjunction with the Trevenson Park South Design and Access Statement which explains the background to the development of the final Design Code.

The introduction section explains the context and structure of the Code. It details why the Code is being used for this project, how it is to be used, and which sections of the Code are applicable to which areas. This sets the structure of the document and how it should be read when applying it to both the Coastline and Custom Build housing on the two parcels of the masterplan.

The detailed Design Code section of the document clarifies what is permitted and what is restricted within the designs of the houses and their plots. This part of the document is structured into twelve headings each covering a range of items. The plot parameters section sets the baseline for proposed development, and is followed by permitted variations and restrictions to the plot parameters through the following design codes. Wider scale Design Code elements are then addressed through the urban realm aspects of building set-backs, boundaries, car parking and corner plots. The later sections of the Design Code address the materials and details of the external aspects of the designs by clearly defining permitted lists and restrictions.

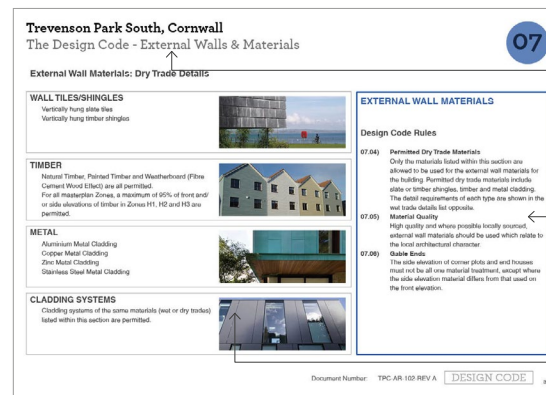
### Example Pages: How to use the Design Code



Section Number  
Section heading

Outlined Design Code Rules of the Design Code section

Details and explanations of the Design Code section (through the use of a diagram)



Section Number  
Section heading

Outlined Design Code Rules of the Design Code section

Details and explanations of the Design Code section

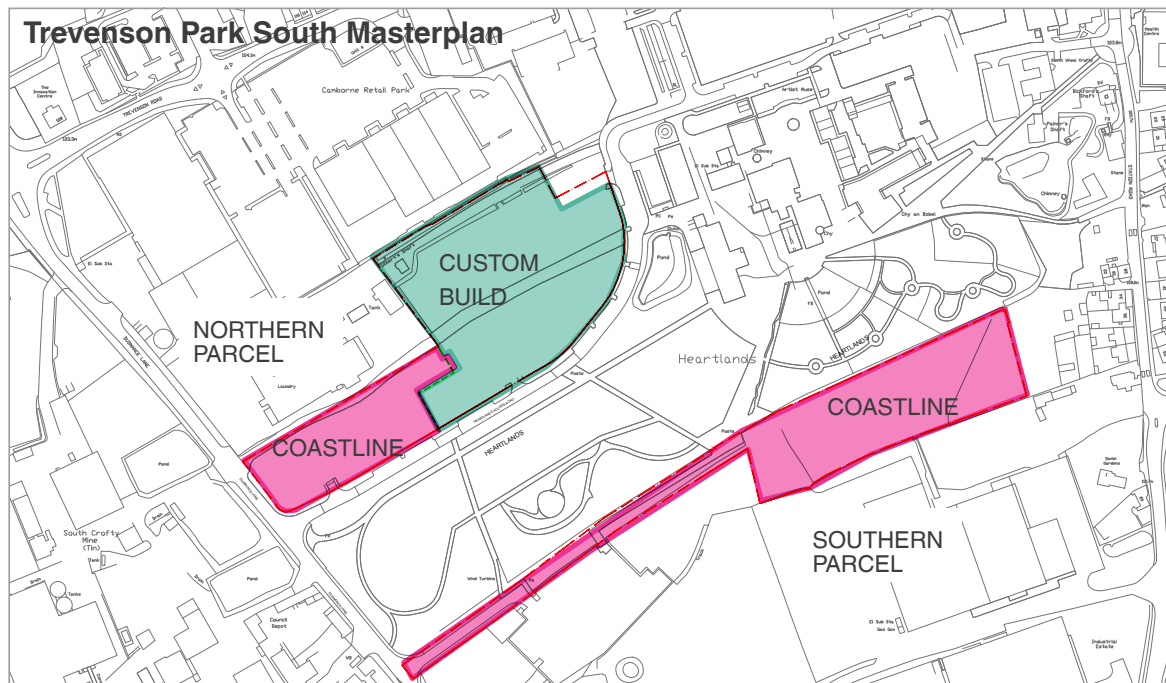


# Trevenson Park South, Cornwall

## How to Use The Code

### Applicable Sections of the Code

The Design Code is to be applied to both the northern and southern parcels of land with the Trevenson Park South Masterplan and is relevant for the Custom Build housing and Coastline housing. The plan below identifies which areas on the masterplan are the Custom Build plots and which are the Coastline plots. Different sections of the document are to be applied to each type of housing within the masterplan. To explain this, adjacent is a code matrix which defines which sections of the code apply to which type of housing. Where a code section applies the housing design must comply with the whole of the Design Code rules of that section.



### DESIGN CODE MATRIX

DESIGN CODE NUMBER	CUSTOM BUILD HOUSING	COASTLINE HOUSING
01 - PLOT PARAMETERS	01	
02 - ADJOINING /ADJACENT PROPERTIES	02	
03 - BUILDING PROJECTIONS & RECESSES	03	
04 - CORNER PLOTS & END HOUSES	04	04
05 - PLOT FRONTAGES & BOUNDARIES	05	05
06 - CAR PARKING	06	06
07 - EXTERNAL WALLS & MATERIALS	07	07
08 - ROOF ZONE & MATERIALS	08	08
09 - DOORS, WINDOWS & DAYLIGHT	09	09
10 - EXTERNAL BUILDING DETAILS	10	10
11 - EXTERNAL COLOUR PALETTE	11	11
12 - OTHER ITEMS	12	12

# APPENDIX 5: EXAMPLE OF A PLOT PASSPORT



## Plot Passport

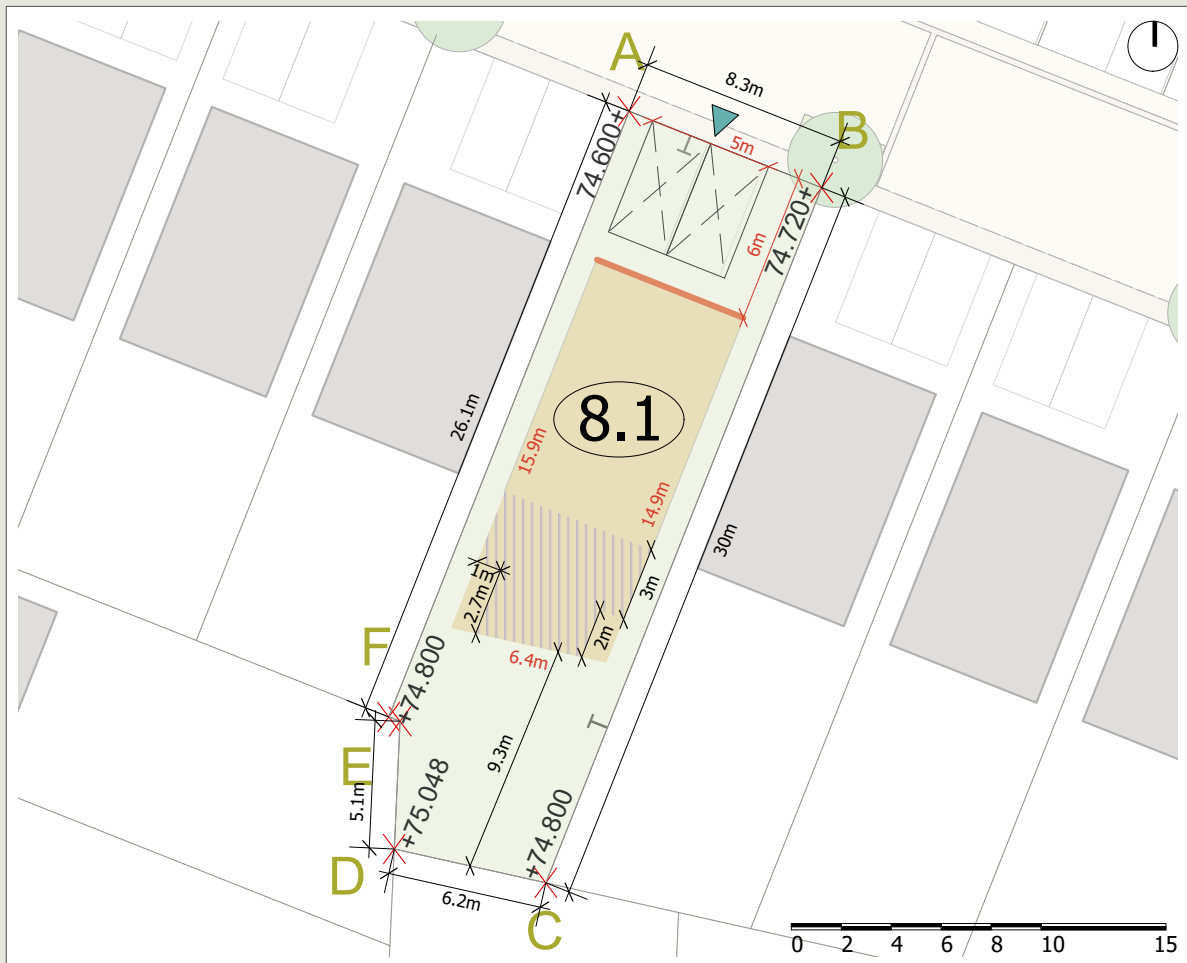
**0084**

1982-A-P-P-C-0084-170327-15

### Main features

**Plot Number:** 0084  
**Unit Type:** 3 Bed Detached  
**Local Character:** Urban Lane  
**Plot Area:** 247 m<sup>2</sup> / 0.0611 acre  
**Max. GIA:** 114 m<sup>2</sup>

- Build zone
- Extent of plot
- On-plot car parking spaces
- Vehicular access
- Max. building height (metres)
- Fixed position of main facade
- Rear facade zone
- Boundary for which the purchaser has the responsibility to maintain



#### Coordinates - Eastings, Northings (metres)

**A:**458959.910, 220837.384    **B:**458967.625, 220834.321    **C:**458956.570, 220806.478    **D:**458950.501, 220807.834  
**E:**458950.733, 220812.945    **F:**458950.279, 220813.126

# Rules of your build

- 1 Prior to development commencing, you must apply to the Local Planning Authority for a determination as to whether your design complies with the site Masterplan and Design Code. Forms are available from Local Planning Authority and must be accompanied by a plan showing the site and details of the proposed development. The Local Planning Authority must respond within 28 days, otherwise you can proceed.
- 2 Your home must be built within the 'build zone' and not exceed the max. permissible Gross Internal Area (GIA) stated above for construction above ground. In addition to the above area, a further 40% of the max. permissible GIA can be constructed below ground for a basement. The footprint of your home does not need to fill the entire 'build zone' & can be positioned anywhere within it. See below for GIA definition.
- 3 No temporary buildings or caravans are allowed on your plot. Prior to Completion, you shall not occupy your home for residential purposes or allow your home to be occupied for residential purposes.
- 4 No works or storage of materials may be undertaken outside the curtilage of your plot without permission from the relevant approving authority either GHVDC, Highways authority or the District Council as applicable.
- 5 All the rear walls of your building must be positioned within the hatched area of the build zone. Should either neighbouring plot have received either confirmation of compliance or planning permission, then any part of your home that would;
  - i) have more than a single storey; and ii) be within 2 metres of the boundary with a neighbouring home with confirmation of compliance or planning permission; then that must not extend beyond the rear wall of the neighbouring home by more than 3 metres.
- 6 The Principal Elevation of your home must front a highway.
- 7 This plot is for one detached unit with a max. of 3 bedrooms. The merging & subdivision of this plot is not permitted.
- 8 Prior to development the Plot Purchaser (as client) must appoint a Principal Designer as required under the 2015 Construction Design and Management regulations.
- 9 Any upper-floor window that is on a side elevation and less than 1.7m above the floor and faces onto a neighbouring house must be:-
  - (i) obscure-glazed (ii) non-opening
- 10 A minimum area of 50% of the plot frontage (the area between the highway and your front wall) must be permeable (i.e. grass / shrubs / gravel etc.). On the remaining area any hard surface to be provided on land between a wall forming the principal elevation of the home and the highway must either be made of porous materials, or provision made to direct run-off water from the hard surface to a permeable or porous area or surface within the curtilage of the home.
- 11 Unit Completion must take place within 24 months of the Completion of Sales Contract. See below for Unit Completion definition.
- 12 Your home must be no more than 8.1m as the maximum building height. This equates to approximately 2 storeys. The maximum building height means the height of your home when measured from ground level of the plot to the top of the highest part of the roof excluding any external chimneys, flues, soil or vent pipes or other structures for renewable energy generation.
- 13 The height of any external chimney, flue, soil or vent pipe, or other structure for renewable energy generation, must not exceed the highest part of the roof of the home by 1 metre or more.
- 14 Provision for the secure storage of min. 2 bicycles must be demonstrated in the design. Storage for 3 no. 240 litre wheelie bins (59w x 107h x 74d (cm)) for recycling, garden and residual waste should also be shown and must not be visible from road.
- 15 2 car parking spaces (vehicle bays) must be provided on the plot and be a minimum of 2.5m x 5.5m in size. The position of parking bays is to your discretion. However, the position of vehicular access is fixed and must be located as shown on the Plot Plan overleaf. The minimum internal dimensions for a single car garage is 3.0m x 6.0m.
- 16 Front boundaries to be maximum 1.1m high. Front boundary means any boundary which is or would be forward of the principal elevation of your home. Side/rear boundaries to public areas to be maximum 1.5m high with 0.3m trellis over. Side/rear boundaries to private areas to be maximum 1.8m high. Any material/colour permitted.
- 17 The majority of the main facade(s) of your home must be constructed on the line shown. Bay windows must not protrude more than 1.5m beyond this line.
- 18 Terraces, balconies and raised platforms above ground level are not permitted where they would extend beyond a wall forming a side elevation or any wall forming a rear elevation of your home.
- 19 The T bars shown on the Plot Plan indicate the boundaries to your plot for which you have the responsibility to maintain.

## Performance and Sustainability Requirement:

<b>Thermal element U-values; at least:</b>	Walls: U = 0.15 W/m <sup>2</sup> K, Ground Floor: U = 0.15 W/m <sup>2</sup> K, Roofs: U = 0.15 W/m <sup>2</sup> K
<b>Thermal bridges; meet one of the following standards:</b>	<p>(i) Use Accredited Construction Details, provided by the Government's planning portal website. An overview can be downloaded from <a href="http://www.planningportal.gov.uk">www.planningportal.gov.uk</a>. In particular at: <a href="http://www.planningportal.gov.uk/buildingregulations/approveddocuments/part1/bcassociateddocuments9/acd">http://www.planningportal.gov.uk/buildingregulations/approveddocuments/part1/bcassociateddocuments9/acd</a></p> <p>(ii) Achieve the Association of Environmentally Conscious Builders (AECB) Gold or Silver Standard details as a minimum to achieve <math>\gamma = 0.08</math> W/m<sup>2</sup>K.</p> <p>(iii) Improve on the Accredited Construction Details to achieve a maximum <math>\gamma = 0.08</math> W/m<sup>2</sup>K.</p>
<b>Window U-values and g-values (Glazing &amp; Frames combined); at least:</b>	U = 1.4 W/m <sup>2</sup> K Range for solar gain factor (g-value): g = 0.50 - 0.70
<b>Air Leakage rate</b>	3m <sup>3</sup> /hr/m <sup>2</sup> @ 50 Pa test pressure
<b>Mechanical ventilation with heat recovery where specified:</b>	Electrical efficiency $\leq 1.5$ W/l.s Heat recovery efficiency $\geq 70\%$
<b>Overheating risk</b>	Consider design strategies that minimise the risk of summertime overheating risk. As a minimum comply with Building Regulations Part L Standards Assessment Procedure (SAP) Appendix P, or equivalent assessment method to achieve 'low' or 'medium' risk of overheating.
<b>Electrical lighting</b>	Minimum 75% of fixed lighting to be low energy (such as compact fluorescents or LEDs)

## Definitions

### Home

Home refers to a dwelling house or building which does not include a building containing 1 or more flats or a flat contained in such a building.

### Gross Internal Area (GIA)

The Gross Internal Area means the total enclosed internal floor area of your home measured within the external walls taking each floor into account and excluding the thickness of the external walls. The GIA of your home also includes integral garages and conservatories.

### Principal Elevation

Is the elevation of your home that faces the vehicular access to your plot.

### Completion

Unit Completion shall be deemed to be achieved on the date of the earliest of the following being issued in respect of your home; i) the date of completion notice for Council Tax purpose in accordance with schedule 4a of the Local Government Finance Act 1988 and section 17 of the Local Government Act 1992 or ii) the date of the building regulations completion certificate in accordance with section 17 of building regulations or if earlier the date on which any latent defects insurer issues the policy cover note in respect of the building works.





## Ground Conditions Information (GC1)

0084

### Main features

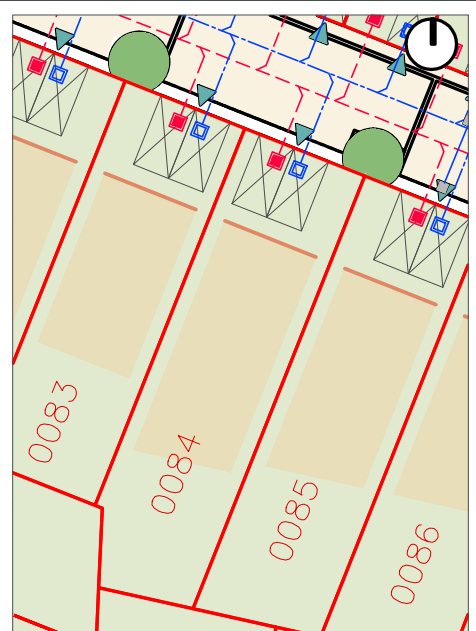
Foundation Type:	Strip or Trenchfill
Foul Water MH:	E:458961.932, N:220835.294 IL:73.300
Surface Water MH:	E:458963.325, N:220834.737 IL:73.400

#### Key

-  = Surface Water Disconnecting Manhole
-  = Foul Water Disconnecting Manhole

MH = Disconnection Manhole

Manhole Coordinates are E-Eastings, N-Northings (metres),  
IL - Invert Level (m-AOD)



- 1 A Ground Investigation (GI) has been undertaken by the Graven Hill Village Development Company Limited (The Company), at Construction Phase 1a, comprising Boreholes (BH) and Trial Pits (TP) and associated laboratory testing.
- 2 For unconventional; dwelling layouts, designs, loadings or construction, additional Ground Investigation and soil testing may be required for such plots. This will be carried out, if required, by the Company, and the cost incorporated into the purchase price.
- 3 Each self-builder purchaser is required to arrange for the design and construction of their dwelling with the exception of the '**Golden Brick**' which will be designed and constructed, to suit the self-builder purchaser's dwelling design, by the Company and the cost incorporated into the purchase price. It is recommended that professional advice is obtained for their dwelling design and construction.
- 4 The Company will design and construct the '**Golden Bricks**', as described below. To enable the Company to design the foundations, substructure and drainage etc. associated with the '**Golden Brick**', each self-builder purchaser is required to provide the Company with the following, as a single package of information:
  - all drawings are required as AutoCAD /.dwg and as pdf files:
  - fully dimensioned general arrangement plans, cross sections and elevations showing and dimensioning; all load bearing walls, columns, and any other applied loads bearing onto the ground floor or foundations;
  - if required, the self-builder purchaser's proposed form of suspended ground floor slab; e.g. precast concrete beam and block, cast in situ reinforced concrete, etc., (NB: the ground floor slab will need to be suspended to allow for heave and the expansive, shrink / swell of the highly plastic underlying Oxford Clay);
  - a drawing showing the magnitude and direction of all the point loads (kN) at columns and line loads (kN/m) along all load bearing walls bearing onto the ground floor or foundations;
  - a fully dimensioned ground floor plan, and where appropriate drawing/s or cross sections, showing the locations, alignment, dimensions and details etc., of all services that are required to penetrate through or beneath the ground floor slab, the ground beam/s or under the dwelling so that these may be co-ordinated with the design of the foundations and the '**Golden Brick**';
  - a fully dimensioned ground floor plan, and where appropriate drawing/s or cross sections, showing the locations, alignment, dimensions and details etc., of all services that are required outside the dwelling footprint, such as rainwater down pipes, and other surface water drainage, so that these may be co-ordinated with the design of the foundations and the '**Golden Brick**';
  - a fully dimensioned ground floor plan, and where appropriate drawing/s or cross sections, showing the locations, alignment, dimensions and details etc., of all other services, i.e. other than foul and dirty / grey water, and surface water, that are required to penetrate through or beneath the ground floor slab, the ground beam/s or under the dwelling so that these may be co-ordinated with the design of the foundations and the '**Golden Brick**';

## Background Information

- details of proposed external site finishes;
- proposed level(s) around the perimeter of the dwelling;
- proposed level(s) around the perimeter of the dwelling, and all other levels shall relate to the finished surface levels given on the Plot Passport, generally in the corners of the plot;
- proposed level(s) of the ground floor slab and external levels at corners of the dwelling;
- proposed finished floor level(s) at ground floor level including details of the make-up of the finishes above the structural floor whether it be precast concrete beam and block, cast in situ reinforced concrete, etc;
- typical detail at the junction of external walls with the top of the ground beam foundation, the ground floor slab and the external ground level(s);
- co-ordinates to external facade corners of the dwelling to enable the dwelling to be located within the plot.

### 'Golden Brick'

- 5 The term refers to the condition in which the individual plots at Graven Hill will be transferred to self-builder purchasers on completion of the sales contract. The Company will provide a fee quotation for the 'Golden Brick' based on the self-builder purchaser's specification, layout and design for their dwelling. This along with the plot land price becomes the total purchase price due at completion. Once the purchase price is agreed, exchange of contracts can take place at which point the self-builder purchaser pays a 10% deposit of the total purchase price due.
- 6 The 'Golden Brick' comprises the foundations (which will be piled foundations or other appropriate and approved foundation solution/s), the substructure, drainage and ground floor slab, constructed to accommodate the self-builder purchaser's dwelling specification, layout and design. Drainage, both foul and surface water, will be extended by the Company from the disconnection manholes, located just inside the plot boundary, to termination points through the slab and to suit rainwater pipes, again all to self-builder purchaser's required layout and design.
- 7 The Company will carry out bulk earthworks at the site including removing topsoil, carrying out earthworks cut and fill, but will leave a stockpile of topsoil in the back garden for the use of the self-builder purchaser, unless otherwise agreed.
- 8 For the avoidance of doubt the 'Golden Brick' does not include the design or construction of any thermal insulation or any other work, other than specifically listed above. All these other items will be the responsibility of the self-builder purchaser.
- 9 The natural underlying Oxford Clay Formation is typically described as:
  - at some locations; initially soft, generally becoming firm and eventually stiff with depth, fissured orangish brown or brownish grey or bluish grey sandy CLAY or sandy silty CLAY or silty CLAY with frequent fine to coarse gravel sized pockets of orangish brown silt and with frequent fine and medium sand sized gypsum crystals. Fissures are randomly orientated undulating smooth.
- 10 If poor quality, soft, etc. ground is present beneath excavated topsoil, the Company will excavate such material and replace it with acceptable material, referred to as Engineered Fill / Made Ground.
- 11 In such circumstances it is generally recommended that foundations are founded below the Engineered Fill / Made Ground and that a suspended foundation slab is provided due to the shrink / swell properties of the underlying Oxford Clay.
- 12 Generally, where the depth to a suitable founding stratum is greater than typically 2.0m, piled foundations typically become more cost effective.
- 13 **Ground Gas Monitoring:** Ground gas and ground water elevation monitoring standpipes were installed as part of the preliminary ground investigation.
- 14 Ground gas assessment has been undertaken in accordance with CIRIA guidance. Based on the monitoring results carried out during the Ground Investigation in 2015, the Site has been classified as Characteristic Situation 1. Therefore, no ground gas protection measures are necessary.
- 15 The Site is not in a radon gas affected area. However, current advice from Public Health England (formally Health Protection Agency) is that all new dwellings should include basic radon protective measures as a minimum whether they are in a radon gas affected area or not.
- 16 **Expansive Clay:** The Oxford Clay is highly susceptible to shrink / swell with variations in moisture content and consequently, it is recommended that all foundations extend below the depth of volume change potential and incorporate heave protection measures in accordance with Premier Guidance etc.
- 17 **Concrete Class:** The required class, quality, of buried concrete will vary from location to location across that site. It is recommended that buried concrete is determined and designed in accordance with BRE Special Digest 1:2005 'Concrete in aggressive ground'.

### Utility supply features

#### Electricity

230V Single Phase, 50Hz AC  
100A/23kVA Supply Rating Max

#### Gas

25mm PE LP Pipe, 30kW Supply Rating Max.

#### Water

25mm ALPE Pipe with Meter, Stop Valve and Double Check Valve Standpipe.  
Min Pressure 8m Head, Approx

#### Telecoms

Fibre Service

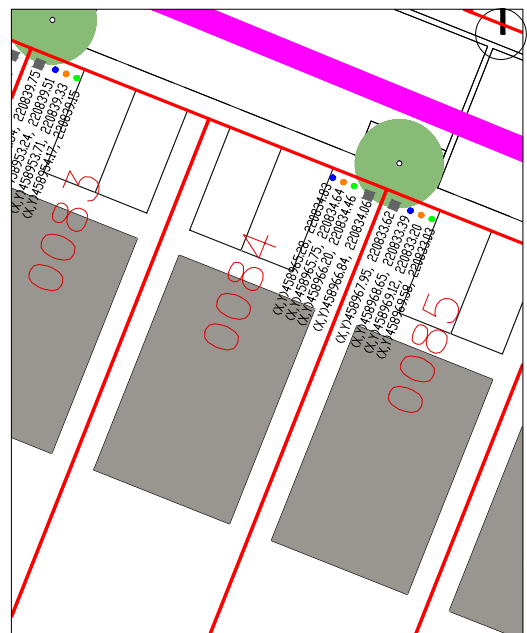
#### Key

Electricity Supply  
Gas Supply  
Water Supply  
Telecoms Supply  
Multi Utility Distribution Network



#### Co-ordinates

Co-ordinates indicate services intake position within site boundary



## Plot Boundary Service Connections

### 1 Electricity

The electricity supply terminates in a ground mounted enclosure, just inside plot boundary, housing a 100A fuse cut-out, a 100A DP RCBO, with space for the provision of a small distribution board and meter. MPAN number will be supplied to allow the purchaser to arrange for a meter to be installed. (refer to 'Arranging for your meter' section)

### 2 Gas

The gas supply will require extension directly from the gas main in the road to the meter position in a built in or wall mounted meter box once the meter box has been installed on the building. The service pipe must be laid in a straight line between the connection to the main and the meter position. The proposed service pipe location is shown within the diagram above, any changes to this position must be provided to GTC as part of the Golden Brick design. Any subsequent variation to this location may incur additional cost to the self-build purchaser.

### 3 Water

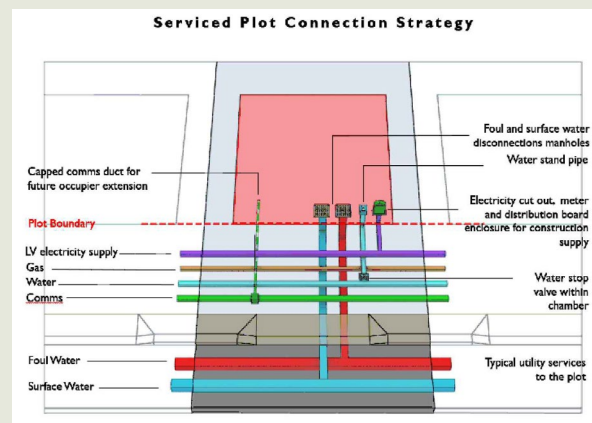
The water supply terminates at a double check valve and standpipe, just inside plot boundary, with meter and stop valve chamber in footway.

### 4 Telecoms

The telecoms provision terminates with a cable duct, at the plot boundary.

### 5 Drainage

Refer to 'Drainage' under separate passport.





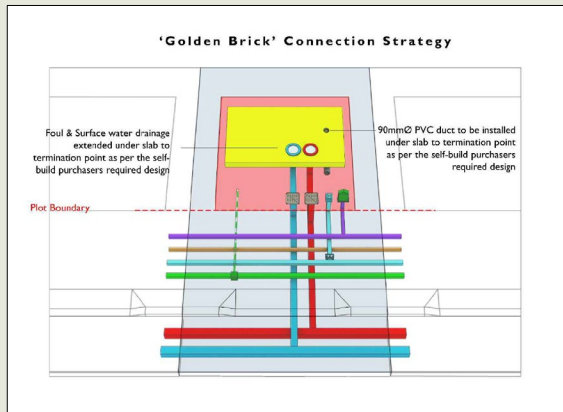
## Golden Brick Connection Strategy

### 1 Water

An under slab PVC duct shall be installed to a termination point through the house foundation slab, to suit the stop cock location specified by the self-builder / purchaser, for the future installation of the incoming water pipe.

### 2 Drainage

Foul and surface water pipes are indicatively shown, please refer to the separate drainage plot passport for full details.



## Getting Connected

### 1 Electricity

Two options are available:

A - Self-build purchaser arranges with their approved electrical contractor to extend the private service cable to the dwellings consumer unit.

B - Through GTC, obtain quotation and make payments to disconnect service at boundary, extend service cable to dwelling, relocate cut-out and meter (arranged with chosen meter operator), install and connect cable tails to local consumer unit. All in accordance with the given utility provider's requirements.

### 2 Gas

Self-build purchaser shall appoint and pay GTC to install, in a pre-excavated trench the gas service from the gas main in the road. Footpath and roadway excavation and reinstatement will be by GHDC contractor. All excavations and backfill within site boundary by self build purchaser. Service will terminate in external wall mounted IP65 meter enclosure c/w new meter, ECV (Emergency Control Valve, provided by the self-build purchaser). All in accordance with the given utility provider's requirements.

### 3 Water

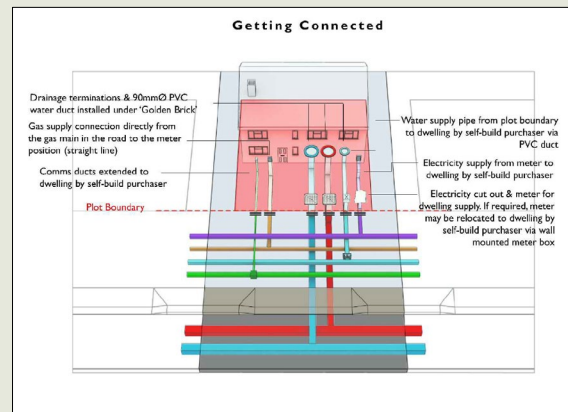
Self-build purchaser shall make all arrangements to extend water service pipe from standpipe position to their building, terminating at an internal stop cock. Water pipe shall enter the dwelling via the under slab duct provided with the Golden Brick. Obtain approvals in accordance with the given utility provider's requirements.

### 4 Telecoms

Self-build purchaser to extend comms duct from capped position at plot boundary to the building at a depth of 350mm-450mm below finished ground level. Duct to terminate within an external wall mounted IP65 terminal box, vertically by means of a pre-formed 90 degree bend on the external wall. The services duct must be cut level two bricks below the damp proof course.

Self-build purchaser to supply and install a standard 25mm conduit through the cavity wall at the point that is vertically above the end of the service duct. External Capping 25A and Connector Bend 4 should be fitted as required.

Self-build purchaser must install a draw rope (which will be supplied by GTC) in all ducts, and all ducts are to be "brush and mandrel" cleaned, prior to quality checking and handover to GTC. Refer to GTC technical Guidelines - Fibre to the Home, GF-TGI-IG-0016 Rev 04



## Arranging for your meter

### 1 Electricity

The electricity supply point for the construction supply to the dwelling will be identified by a MPAN (Meter Point Administration Number). The purchaser must arrange a supply contract with the Supplier of their choice, register the MPAN with them and they will arrange for their Meter Operator to install the meter and energise the supply. The MPAN number can be obtained from GTC.

### 2 Gas

The gas supply point to the dwelling will be identified by a MPRN (Meter Point Registration Number). The purchaser must arrange a supply contract with the Supplier of their choice, register the MPRN with them and they will arrange for their Meter Operator to install the meter and energise the supply. The MPRN number can be obtained from GTC.

### 3 Water

The water supply will be provided with a meter by the service provider and connected as described under 'Getting Connected'.

### 4 Telecoms

The telecoms provision will be subject to a service agreement with the service provider and connected as described under "getting connected". Broadband speeds of up to 300Mbps are available subject to the service agreement with the supplier. For a list of current suppliers go to [www.ifnl.net](http://www.ifnl.net)

## Additional Notes

### 1 Payments

It is the self-builder / purchasers responsibility to make all necessary arrangements and payments for extensions, diversions and connections to the utility services.

### 2 Electricity

If PV solar panels and / or a heat pump is proposed to be installed, the self build purchaser should liaise directly with the given utility provider for approvals before making connections.

## SUBJECT TO PLANNING APPROVAL

This plot passport relates to the design of your home. There are additional conditions that are statutory (i.e. legislation) & mandatory within your agreement for sale & deed of transfer which you must adhere to. Therefore please ensure that you refer to these before proceeding with design work on or offsite fabrication or construction. This includes conditions relating to health & safety, site working hours, deadlines for completing your home & consideration of neighbouring properties



# Latent Defect Policies

## Main Features

- Premier Guarantee are providing 10 year latent defect policies covering the structure and waterproof envelope of your new home, they are also undertaking the statutory Building Control function.
- You must provide Premier with a full set of drawings, before any building works commence, in order that they can check your design and materials comply with the Building Regulations, and other requirements.
- Premier will also provide a Site Surveyor who will inspect the work in progress and their design audit team and technical services will check your submitted design for compliance, a report will be provided and any issues in Section 1 of the report must be addressed. The Site Surveyor will be able to offer advice and will check specific areas to ensure the agreed design is followed on site.
- If you have any specific queries please contact Jake Acton on 0151 650 4343 who will advise of the best person to speak to. For more information on Premier Guarantee, go to [www.premierguarantee.co.uk](http://www.premierguarantee.co.uk).
- To submit your drawings, please include all of the submission requirements listed below and send directly to the following address, [gravenhill@premierguarantee.co.uk](mailto:gravenhill@premierguarantee.co.uk).

## Drawing Submission should include

- 1 Sections, floor plans and elevations
- 2 Detailed specification: to include, external wall construction and specification, roof construction and covering internal structural components, heating and ventilation systems and energy ratings etc.
- 3 Drainage layouts and details
- 4 Any reports, 3rd party assessment and manufacturer details for any innovative forms of construction

### Innovative Construction

- There are some types and forms of innovative construction that Premier cannot accept, you must obtain agreement from Premier for the use of any innovative form of construction and / or components.
- Premier consider Innovative construction to include anything other than Brick and Block, or traditional Timber frame construction.
- Premier do not accept any form of green or air dried oak construction, nor do they generally accept monolithic construction.
- Premier will endeavour to advise you of any issues as soon as possible, and usually within 4 weeks of receipt of the above.

**Note:** Unfortunately, failure to submit necessary information to Premier Guarantee in a timely manner will affect your ability to progress with works on site and have it inspected by their Risk Management Surveyor, and could also require expensive and time consuming changes at a late stage of construction.





# Plot Passport

## Phase 1A

1982-A-P-P-C-R-R-170327-15

### Revision Record

Date	Revision	Plot Passport	Comments	Checked
16.03.29	01	All 75 Golden Brick	Issued	TA
16.07.11	02	All 75 Golden Brick	Rear Facade Zones added	TA
16.07.22	03	All 75 Golden Brick	Format updated	TA
16.08.17	04	All 75 Golden Brick	Revision record added	TA
16.09.20	05	All 75 Golden Brick	Maximum GIAs updated	TA
16.10.12	06	Release 1	Page 2 rules updated	TA
16.10.18	07	Release 1-3	Material Palette updated	TA
16.11.01	08	All 75 Golden Brick	Bedroom numbers updated	TA
16.11.08	09	All 75 Golden Brick	Maximum GIAs updated	TA
16.11.09	10	0035-0039	Minimum height amended	TA
16.11.15	11	All 75 Golden Brick	Page 2 rules updated	TA
16.12.12	12	All 75 Golden Brick	Latent Defects Annex added to all PPs	TA
17.01.20	13	Release 1-5	g-values amended to 0.50-0.70	TA
17.01.23	14	Outstanding Ph 1a	Rule 5 and Micro units updated	TA
17.03.27	15	All 75 Golden Brick	Plot levels & GC1 updated	TA

## APPENDIX 6: GLOSSARY

**Affordable Housing:** Affordable housing: housing for sale or rent, for those whose needs are not met by the market (including housing that provides a subsidised route to home ownership and/or is for essential local workers); and which complies with one or more of the following definitions:

Affordable housing for rent, starter homes, discounted market sales housing, other affordable routes to home ownership. [https://consultations.southglos.gov.uk/consult.ti/AH\\_SPD20/consultationHome](https://consultations.southglos.gov.uk/consult.ti/AH_SPD20/consultationHome)

**AONB:** Area of Outstanding Natural Beauty.

**Bond Payments:** Can be required from plot purchasers to the developer/landowner to ensure that any damage to the road and kerbs during construction can be recouped, the bond can be extended to cover the whole self-build site, for example, to repair accidental damage.

**CE:** Climate Emergency

**CIL:** The Community Infrastructure Levy is a charge which can be levied by local authorities on new development in their area. It is an important tool for local authorities to use to help them deliver the infrastructure needed to support development in their area.

**CLH:** Community-Led Housing is housing that is built, controlled and owned by the community.

**Climate Change Strategy:** A South Gloucestershire Council adopted on 8th October 2018 that aims to set out our priorities and targets for reducing greenhouse gas emissions in South Gloucestershire that contribute to national and global efforts as well as to limit the dangerous effects of climate change, and to manage the risks posed by a changing climate.

**CCS:** The South Gloucestershire Climate Change Strategy 2018-2023 (adopted on 8th October 2018)

**Cohousing:** Intentional communities, created and run by their residents. Each household has a self-contained, private home as well as shared community space. Residents come together to manage their community, share activities, and regularly eat together (definition taken from <https://cohousing.org.uk/about/about-cohousing/> ).

**CS:** South Gloucestershire Local Plan: Core Strategy 2006 – 2027 (adopted 11th December 2013).

**CSB:** Custom and self-build.

**Custom Build:** Custom-Build (also commonly referred to as ‘self-build’) is the practice of creating an individual home for yourself.

The Housing and Planning Act 2016 inserts the following definition into the Self and Custom Housebuilding Act:

(A1) in this Act “self-build and custom housebuilding” means the

building or completion by—

- (a) individuals,
- (b) associations of individuals, or
- (c) persons working with or for individuals or associations of individuals, of houses to be occupied as homes by those individuals.

(A2) But it does not include the building of a house on a plot acquired from a person who builds the house wholly or mainly to plans or specifications decided or offered by that person.

The Custom and Self Build Toolkit (<http://customandselfbuildtoolkit.org.uk/#>) defines **self and custom built homes** as properties commissioned by people from a builder, contractor or package company (this is known as ‘custom build’ housing). When people physically build themselves, sometimes with help from sub-contractors, this is known as ‘self-build’ housing. We call all these people ‘private homebuilders’.

**Ministry of Housing, Communities and Local Government:** The Government department with specific responsibility for communities and local government, covering planning, housing and regeneration.

**Design Code:** A set of illustrated design rules and requirements which instruct and may advise on the physical development of a site or area.

**GIA:** This refers to gross internal area (GIA) in square metres of the new dwelling(s) and is taken from the Technical Housing Standards - Nationally Described Space Standards (MHCLG, 2015). GIA of a dwelling is defined as the total floor space measured between the internal faces of perimeter walls<sup>1</sup> that enclose the dwelling. This includes partitions, structural elements, cupboards, ducts, flights of stairs and voids above stairs. The Gross Internal Area should be measured and denoted in square metres (m<sup>2</sup>) (para. 80).

**Graven Hill:** The UK's largest self and custom build community consisting of up to 1,900 homes that are to be built over 10 years  
<https://www.gravenhill.co.uk/>.

**Greenfield Site:** A site that has not been built upon previously. It is usually agricultural land but it can be undeveloped land in a city or a rural area.

**Housing Performance Monitoring Report:** Council monitoring report which provides an indication of performance, and also trend arrows to provide an indication of movement from the previous quarter.

**Neighbourhood Plans:** A Neighbourhood Plan (sometimes called a Neighbourhood Development Plan) is a way of helping local communities to influence the planning of the area in which they live and work. It can be used to develop a shared vision for your neighbourhood.

**Local Planning Applications Requirements:** To make a valid planning application there are statutory and local information requirements which apply to each application type. Local requirements are set by the local planning authority having regard to local policies and constraints and are relied upon for a successful determination. A list of the items which form part of South Gloucestershire Council's Local List (reviewed November 2019)  
<https://beta.southglos.gov.uk/wp-content/uploads/Revised-LPAR-2019-Website-Version.pdf> .

**NaCSBA:** National Custom and Self Build Association. NaCSBA is the voice of the Custom and Self-build housing sector.

**National Planning Policy Framework (NPPF):** The National Planning Policy Framework sets out the Government's planning policies for England and explains how these policies are expected to be applied. It provides guidance for local planning authorities and decision-takers, both in drawing up plans and making decisions about planning applications.

**National Planning Policy Guidance (NPPG):** National Planning Practice Guidance is now available entirely online - <http://planningguidance.planningportal.gov.uk/> . This online resource provides a link between the National Planning Policy Framework and relevant planning practice guidance, as well as between different categories of guidance.

**Net zero (within context of 'operational energy'):** When the amount of carbon emissions associated within the buildings operational energy on an annual basis is zero or negative. A net zero carbon building is highly energy efficient and powered from on-site and/or off-site renewable energy sources, with any remaining carbon balance offset

**Outline planning application:** An application for outline planning permission allows for a decision on the general principles of how a site can be developed. Outline planning permission is granted subject to conditions requiring the subsequent approval of one or more 'reserved matters'.

**Phasing:** A "phased planning permission" being defined as "a planning permission which expressly provides for development to be carried out in phases". Importantly where planning permission authorises development in phases then each phase may be a separate chargeable development. Phasing is important in self-build and custom build developments in order for the self-builder to retain their CIL exemption.

**Pre-application enquiry:** If you know that planning permission is needed for your project, you can apply for an informal pre-application assessment before you submit a planning application. A pre-application assessment of the acceptability of the scheme. There is a fee involved for this service.

<https://beta.southglos.gov.uk/pre-application-planning-advice/> .

**Plot Passport:** A plot passport is a simple and succinct summary of the design parameters for a given plot. Although they are not a formal document, they add value by acting as a key reference point for the purchaser, capturing relevant information from the planning permission, design constraints and procedural requirements in an easily understandable and readily accessible format.

**PSP:** South Gloucestershire Policies, Sites and Places Plan (adopted November 2017)

**Reserve matters planning application:** These are those aspects of a proposed development, which an applicant can choose not to detail with an outline planning application (i.e. they can be 'reserved' for later determination, such as layout, scale, landscaping, appearance and access).

**Right to Build:** The Right to Build is a piece of legislation for English authorities, that supports aspiring custom and self builders who want to build their own homes.

**Rural exception site:** allows for affordable housing to be developed in locations where market housing would not normally be acceptable, subject to there being an identified local need.

**Section 106 Agreement:** A legal agreement under section 106 of the 1990 Town and Country Planning Act. Section 106 Agreements are legal agreements between a planning authority and a developer, or undertakings offered unilaterally by a developer that ensure certain extra works related to a development are undertaken.

**Self-build Delivery Statement:** The statement is to ensure that self-build units are delivered onsite to meet the requirements of the [Self and Custom Housebuilding Act 2015 \(as amended by the Housing and Planning Act 2016\)](#).

This document is designed for developers to use as a template to set out the contents of their Delivery Statement, or to simply fill in the question boxes as part of their submission. The criteria are designed to prompt the developer to consider matters, such as, how self-build projects are brought forward (i.e. which model), where the plots will be located, how do they meet the definition of self-build, and so on. The developer/landowner should submit a Delivery Statement with the planning application.

**Self-build Phasing Plan:** phased planning permission, to allow each plot to be a separate chargeable development. Under the 2014 Regulations, schemes can be 'phased' for levy purposes even if they do not benefit from 'outline' planning permission.

**Self-build Register – Part 1:** A register hosted by South Gloucestershire Council where individuals can register their interest in acquiring a plot for their own self-build or custom housebuilding project.

Part 1 – People with a local connection will be added to Part. The Council has a duty to grant planning permission for sufficient plots to meet the needs of those people registered under Part 1.

**Serviced Plot of Land:** A plot of land that either has access to a public highway and has connections for electricity, water, and waste water, or, in the opinion of a relevant authority, can be provided with access to those things within the duration of a development permission granted in relation to that land.

Access to a public highway can include sections of private or unadopted road, it does not mean that the plot has to be immediately adjacent to the public highway just that there is the guaranteed right of access to the public highway.

Connections for electricity, water and waste water means that the services must either be provided to the boundary of the plot so that connections can be made as appropriate during construction or adequate alternative arrangements must be possible such as the use of a cesspit rather than mains drainage.

For example a plot of land alongside an existing public highway that is an infill between existing dwellings would count as being serviced. There is no expectation that services must be physically connected to the plot at the time of granting planning permission.

**Shell Home:** Shall mean a Dwelling on a Custom-build Plot with a target average GIA of 108 square metres (whereby the Council may otherwise approve a range of Dwelling sizes with acceptable GIA through the submission and approval of Plots Passports pursuant to paragraph 2.3) which is to be built to a shell and commissioned by Eligible Purchaser.

**Supplementary Planning Document (SPD):** A document that supplements and elaborates on policies and proposals in development plan documents.

**Windfall Sites:** Sites which have not been specifically identified as available in the Local Plan process. They normally comprise previously developed sites that have unexpectedly become available

## 10. HELP AND INFORMATION

For more help, please get in touch with:

### **Strategic Housing Enabling Team**

South Gloucestershire Council

✉ [HousingEnabling@southglos.gov.uk](mailto:HousingEnabling@southglos.gov.uk) or ✉ [SelfBuild@Southglos.gov.uk](mailto:SelfBuild@Southglos.gov.uk)

☎ 01454 868005

🌐 [www.southglos.gov.uk/housing](http://www.southglos.gov.uk/housing)

### **National Custom and Self Build Association:**

<http://www.nacsba.org.uk/>

### **Right to Build Toolkit:**

<http://righttobuildtoolkit.org.uk/#>

### **Gov.uk:**

<https://www.gov.uk/guidance/self-build-and-custom-housebuilding>

### **Homes England:**

<https://www.gov.uk/government/organisations/homes-england>

### **National CLT Network:**

<http://www.communitylandtrusts.org.uk/>

### **Community-Led Housing Toolkit:**

<https://www.communityledhomes.org.uk/community-led-housing-toolkit>

### **UK Cohousing NETWORK:**

<https://cohousing.org.uk/>



