



Blackburn with Darwen Borough Council

Developer Contributions and Affordable Housing Supplementary Planning Document (SPD)

June 2024

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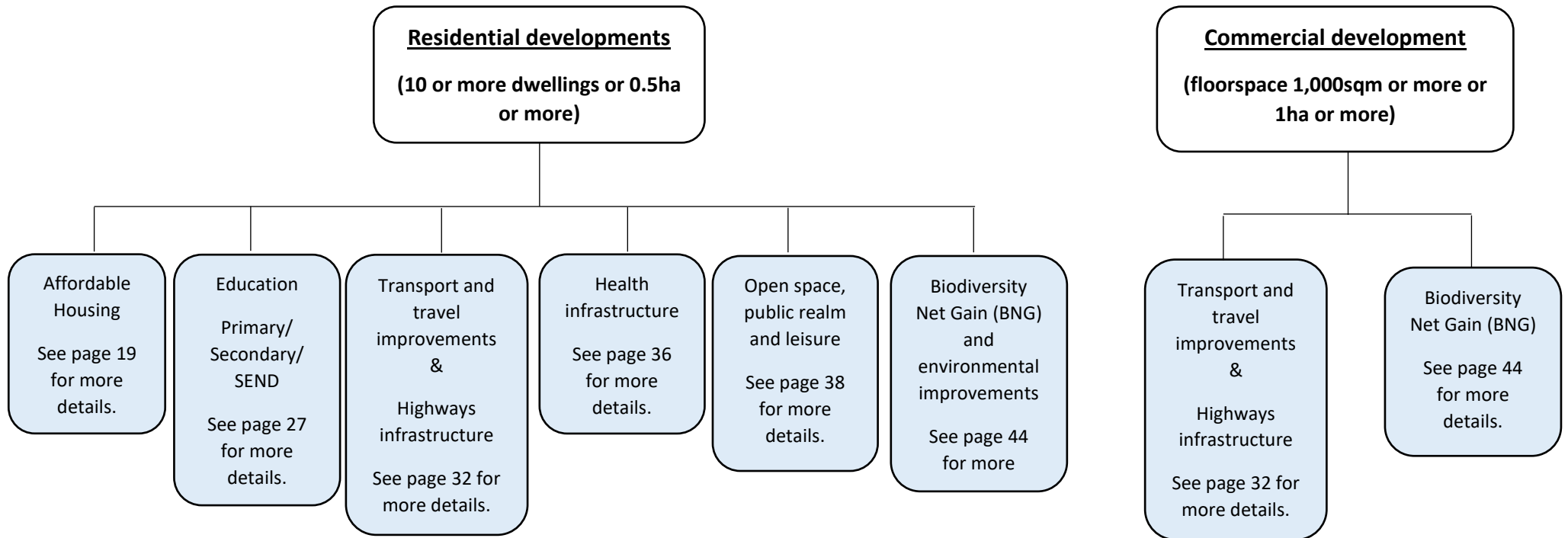
1. Introduction

- 1.1 This Supplementary Planning Document (SPD) sets out the Council's approach to determining and securing developer contributions for new development across the borough. It will sit alongside the Blackburn with Darwen (BwD) Local Plan (2021-2037) which was adopted on 25 January 2024.
- 1.2 SPDs are documents which add further details to policies contained in a Local Plan but do not have their formal statutory 'Development Plan' status. They are, however, a material consideration when a Local Planning Authority is determining whether to approve or refuse a planning application.
- 1.3 This SPD provides detailed guidance on the application of a number of policies within the BwD Local Plan which have implications for developer contributions, in particular Policy CP12: Infrastructure & Delivery which is the policy for seeking planning contributions. It is intended to provide information on how Policy CP12 and other policies requiring affordable housing or specific infrastructure will be interpreted and applied. This will assist planning officers, applicants, service providers, Councillors, and members of the public through the planning application process, ensuring that the process is fair and transparent and is applied consistently.
- 1.4 Developments that include a net increase of new housing can impact on their physical, social and environmental surroundings due to the increased demand for services and increased use of facilities as a result of the additional population that they will typically support. By securing obligations to provide financial contributions from developers, these impacts can be mitigated and, where possible, bring positive benefits for the local area.
- 1.5 The SPD provides further guidance on the Council's approach to seeking contributions towards the following 'appropriate matters', as set out in Local Plan Policy CP12:
 - Affordable housing;
 - Education provision;
 - Transport and travel improvements;
 - Highways infrastructure;
 - Health infrastructure;
 - Open space, public realm and leisure; and
 - Biodiversity net gain and environmental improvements.
- 1.6 This document will ensure clarity with regards to the main types of developer contributions that will be sought, why they are needed, and the monetary formula used to calculate the contributions (where relevant). It may be that in some circumstances, developer contributions are requested for alternative infrastructure provision, for example community facilities, flood defence and water management, environmental improvements, carbon reduction (including decentralised energy) and digital infrastructure. Decisions on the required developer contributions will be determined on a case-by-case basis based on the available evidence and will relate to one of the 'appropriate matters' set out in Policy CP12. The diagram on page 6 provides a summary of the infrastructure requirements from new development. Other infrastructure items may be necessary, depending on the details of the scheme.
- 1.7 All contributions required, in compliance with national or local policy, will be set out as a basis for assessment at pre-application or planning application stage. There may be circumstances where the total of all contributions sought might render the proposed

development un-viable and therefore sufficient contributions cannot be made to mitigate the impact of development. As developer contributions are considered necessary in order to make the development acceptable in planning terms, the Council may then decide to refuse the application and in these circumstances, viability is not considered a valid justification.

- 1.8 It may, however, be the case that some developments are not able to viably make contributions towards all of the infrastructure that is required but that the benefits of development are considered by the Council to outweigh the failure to provide policy compliant obligations. In such cases, where there are viability issues, contributions may be prioritised by the Council, who will seek to achieve a well-balanced package of contributions to best address mitigation.
- 1.9 The Infrastructure Delivery Plan (IDP) sets out current provision of infrastructure across the borough and the infrastructure requirements necessary over the plan period (to 2037) to deliver the levels of growth identified in the Local Plan. The IDP is an iterative document and will support this SPD by providing a regular review and update of infrastructure requirements.

Summary of infrastructure requirements from new developments¹



1% monitoring fee (separate to BNG monitoring fee) will be added to s106 contributions

¹ Other infrastructure items may be necessary than those identified in the flow chart, depending on the details of the scheme.

2. Policy context

National policy

- 2.1 The key purpose of the planning system is to promote sustainable development. The National Planning Policy Framework (NPPF) sets out the Government's planning policies for England and how these should be applied. The NPPF highlights the importance of setting out the levels and type of contributions expected from development, including affordable housing and other supporting infrastructure such as education, health, transport and digital infrastructure.
- 2.2 Further guidance is provided by the National Planning Practice Guidance (PPG) on Planning Obligations and the Use of Planning Conditions. Amongst other matters, PPG also outlines the importance of identifying infrastructure that an authority intends to fund, the different sources of funding proposed and recording this information in an up-to-date Infrastructure Delivery Plan (IDP). An Infrastructure Funding Statement (IFS) is also prepared annually to set out income and expenditure relating to developer contributions. The IDP and IFS can be found on the Council's website at [Planning policies, strategies and guides | Blackburn with Darwen Borough Council](#).

Blackburn with Darwen (BwD) Local Plan (2021-2037)

- 2.3 The BwD Local Plan was adopted in January 2024 and will help to meet development needs and provide a planning framework for determining planning applications up to 2037. New development as set out and supported by the Local Plan can place a strain on existing infrastructure, but also has the potential to provide or help provide new infrastructure or improve existing infrastructure and services.
- 2.4 Where appropriate (i.e. where it is necessary to make the development acceptable in planning terms, including by mitigating impacts), the Local Plan policies state that developers will be required to provide the necessary infrastructure or make financial contributions towards its provision through Section 106 agreements (or Section 278 conditions for delivery of offsite highway works).
- 2.5 The Local Plan sets out that planning contributions will be sought where development creates a requirement for additional or improved services and infrastructure and/or to address the off-site impact of development so as to satisfy other policy requirements. Infrastructure can be provided directly by developers or by way of financial contributions to be used by other bodies to pay for or contribute towards the cost of new or improved infrastructure.

3. Infrastructure Requirements

Identifying Infrastructure Requirements

- 3.1 The known infrastructure requirements to support the specific allocations in the Local Plan are identified both within the individual site allocation policies and in other policies which set out specific provision standards which planning applications must have regard to. Revised infrastructure requirements may result as the detail of schemes is developed over time.
- 3.2 For windfall developments that are supported by the Local Plan, infrastructure requirements and any associated contributions required will need to be assessed as schemes are drawn up on a site-by-site basis. There are a number of strategies and studies that identify and inform infrastructure requirements and standards in relation to planning contributions. The key documents are outlined below.

The Infrastructure Delivery Plan (IDP)

- 3.3 An IDP was prepared to support the Local Plan. The IDP reviews and evaluates the social, environmental and economic infrastructure that will be required to support the development and growth set out in the Plan. It includes an Infrastructure Schedule which identifies the projects required to support planned development, providing details such as indicative costs and timeframes for delivery, any committed funding and funding gaps where known.
- 3.4 The IDP is a 'living document' which will be updated periodically. The most recent version was published in July 2022 and is available to view on the Council's [webpage](#). As part of the Local Plan submission, an update to the [Highways](#) and [Sustainable Transport](#) Infrastructure Schedule lists have subsequently been prepared and these will be incorporated into the next version of the report when it is produced.
- 3.5 The IDP is populated from a wide range of supporting documents, some prepared directly by the Council in support of the new Local Plan, others prepared by third parties or external organisations to the Council. Some of these key documents, and their findings in terms of key infrastructure requirements, are summarised below.

Housing and Economic Needs Assessment (HENAS)

- 3.6 Blackburn with Darwen Borough Council and Hyndburn Borough Council published a joint Housing and Economic Needs Assessment (HENA) in 2018. The two authority areas operate as a single Housing Market Area (HMA) and Functional Economic Market Area (FEMA). The principal purpose of the HENA is to assess future development needs for housing and employment in both local authority areas.
- 3.7 The 2018 study sets out the appropriate recommended mix for housing in the Borough, including affordable provision and size, type and tenure needed for different groups. The HENA considers the range of factors that influence housing demand for different types, tenures and sizes of homes, modelling the implications of demographic drivers, market trends, household earnings and affordability.

- 3.8 In 2021 both Blackburn with Darwen and Hyndburn Councils commissioned a partial update to the 2018 HENA to reflect any significantly economic impacts of both Brexit and Covid since publication of the HENA in 2018.

Playing Pitch & Outdoor Sports Strategy (PPOSS) & Built Facilities Strategy

- 3.9 The [PPOSS](#) has been developed in accordance with Sport England's approved methodology and was prepared jointly with Hyndburn Borough Council. It analyses the current level of pitch provision and identifies the demand for pitches within the two boroughs. The key objectives of the strategy are to protect the existing supply of sports facilities where it is needed for meeting current and future needs; to enhance outdoor sports facilities through improving quality and management of sites; and to provide new outdoor sports facilities where there is current or future demand.
- 3.10 The PPOSS has developed a priority list of deliverable projects which will help to provide for future demands and inform wider infrastructure planning work. The PPOSS will assist with efficient management and maintenance of playing pitch provision in line with budgetary constraints.

Built Sports Facilities Strategy

- 3.11 A [Built Sports Facilities Strategy](#) (2022) was prepared by consultants WYG to inform preparation of the Blackburn with Darwen Local Plan 2021-2037. The Strategy considers the adequacy of provision for swimming pools, sports halls, indoor tennis, indoor bowls, athletics, squash, gymnastics and trampolining, health and fitness, indoor climbing and golf. The Strategy has been produced in line with Sport England guidance.
- 3.12 The primary purpose of the Built Facilities Strategy is to provide a strategic framework which ensures that the provision of indoor built facilities meet local and community needs of existing and future residents and visitors to the Borough. The Strategy includes an Action Plan for each facility and sport. Any specific indoor built sports projects identified as required to support planned growth in the borough are included within the Infrastructure Delivery Plan (IDP) and will help to inform decisions on where developer contributions for such infrastructure will be spent.

Open Space Audit

- 3.13 Green open space in new development is of vital importance in enhancing local amenity, helping to promote better health and well-being and fostering community cohesion, as well as providing essential green infrastructure, establishing habitats and networks of ecological and wildlife value and contributing greatly to the character and appearance of the Borough.
- 3.14 The Council's [Open Space Audit](#) provides a robust assessment of needs and deficiencies of open space in order to establish local provision standards and create an up-to-date evidence base which can be used to inform decision making on planning applications. In particular, it:
- Identifies those neighbourhood areas with a surplus or deficit of a particular open space typology compared to the Borough-wide average provision rates;
 - Identifies areas of the Borough that do not meet local accessibility thresholds; and
 - Assesses the quality of open spaces.

- 3.15 The information contained within the Open Space Audit will be used to determine the most appropriate means of providing open space for residents – whether that be for onsite provision to address the increased need for open space as a result of the development or as a commuted sum to improve the quality and/or accessibility of nearby open spaces.

Pupil Forecasting Work

- 3.16 Edge Analytics undertook [Pupil Forecasting](#) work on behalf of the Council in November 2021 to evaluate the long-term impacts of planned housing development contained within the Blackburn with Darwen Local Plan upon primary and secondary school pupil numbers in the borough.
- 3.17 These forecasts used the latest available data on the resident pre-school population, local schools and their pupils, together with assumptions on the potential impacts of planned local housing development on pupil numbers over the plan period to 2037. This identified a number of potential future shortfalls in both primary and secondary school places across the borough set out below. The figures ensure a 10% surplus capacity is maintained in order to provide some flexibility across each planning area.
- 3.18 Education data identifies a significant transfer between Blackburn South, Blackburn West and Blackburn East Neighbourhood Areas in relation to where pupils reside and the location of the schools they attend. As a result, it is considered the most appropriate approach is to combine these areas when planning for additional primary school places.
- 3.19 It should be noted that as relatively long-term forecasts, the data inputs can vary over time and will therefore be reviewed during the plan period. Such reviews will be informed by the Council's annual school capacity survey (SCAP) return. In summary, current long-term forecasts indicate:
- There is a forecast need over the plan period to 2037 for an additional 88 primary school places in Blackburn North planning area;
 - Combined, there is a forecast need over the plan period to 2037 for an additional 268 primary school places across the Blackburn South, Blackburn West and Blackburn East planning areas;
 - There is a forecast need for an additional 181 primary school places in Darwen between 2026/27 and 2036/37;
 - There is a forecast need for an additional 810 secondary school places in the Borough over the plan period to 2037.
- 3.20 The Council has prepared a [Position Statement](#) which sets out how the Council will aim to meet these shortfalls over the plan period to 2037, with contributions expected from developers.
- 3.21 Edge Analytics undertook a further assessment on behalf of the Council in 2022 to identify SEND forecasts for Blackburn with Darwen in light of planned future housing growth. It concludes that there will be a continued growth in the total number of SEND pupils over the forecast period. By 2031-32, the total number of SEND pupils is estimated to be +335 higher than its 2021-22 total. Contributions will therefore be requested from new residential development to fund additional SEND school places generated as a result of the new homes.

- 3.22 The Council will be commissioning further pupil modelling work in the coming months. Once finalised, these will be made available on the Council's Planning webpage at [Planning policies, strategies and guides | Blackburn with Darwen Borough Council](#).

DfE's Pupil Yield Dashboard and Local Authority School Places Scorecard

- 3.23 The DfE [Pupil Yield Dashboard](#) has been produced to improve baseline evidence of pupil yield from housing development and identifies the pupil yield for each authority in the country. Blackburn with Darwen Council will use these figures to calculate s106 contributions to meet the increased demand for additional school places in the borough from new development.
- 3.24 In addition, the [Local Authority School Places Scorecard](#) includes information on the cost of providing school places which have been adjusted for regional location factors which will also be used to calculate the required s106 contributions for the provision of additional school places.
- 3.25 It is important to note that both the pupil yield and cost per place figures are subject to change. The Council will use the most up to date figures in their calculations.

Local Cycling and Walking Infrastructure Plan (LCWIP)

- 3.26 Local Cycling and Walking Infrastructure Plans (LCWIPs), as set out in the Government's Cycling and Walking Investment Strategy (CWIS), are a new, strategic approach to identifying cycling and walking improvements required at the local level. They enable a long-term approach to developing local cycling and walking networks, typically over a 10-year period, and form a vital part of the Government's strategy to increase the number of trips made on foot or by cycle.
- 3.27 The Blackburn with Darwen Borough Council LCWIP has been prepared with walking and cycling network maps and a programme of prioritised improvements to take forward in the short, medium and long term.
- 3.28 As part of Phase 3 'Development of Network Priorities' of the LCWIP preparation, the Leeds & Liverpool Canal corridor and a Southeast Blackburn Active Travel Network have been identified as early priorities for further development as part of the LCWIP development proposals. The Southeast Blackburn Active Travel Network has committed funding through the Levelling Up Fund and several elements of the Leeds & Liverpool Canal Corridor are being progressed thanks to Active Travel Fund 4 scheme development funding.

Bus Service Improvement Plan (BSIP)

- 3.29 The National Bus Strategy ('the Strategy') sets out an ambitious vision to dramatically improve bus services in England outside London through greater local leadership, to reverse the recent shift in journeys away from public transport and encourage passengers back to bus.
- 3.30 As the Strategy explains, there can be no return to a situation where services are planned on a purely commercial basis with little or no engagement with, or support from, Local Transport Authorities (LTAs). Bus Service Improvement Plans (BSIPs) are how LTAs, working closely with their local bus operators and local communities, address this

– by setting out a vision for delivering the step-change in bus services that is required by the Strategy. A BSIP is the essential first step as it will be the extent of the ambition, delivered through an Enhanced Partnership or franchising.²

- 3.31 Blackburn with Darwen Council working with Lancashire County Council and bus operators recently prepared their Bus Service Improvement Plan (BSIP) which outlines how buses could be made the transport mode of choice for many more people. The plan sets out how public transport could be revolutionised through service and infrastructure improvements along with simpler, cheaper ticketing across the area. Further details on the BSIP can be accessed at [Bus Service Improvement Plans | Blackburn with Darwen Connect \(bwdconnect.org.uk\)](https://www.blackburnwithdarwenconnect.org.uk).

Local Plan Transport Studies

- 3.32 The potential impacts of development on both the strategic and local transport networks have been assessed thoroughly through several different transportation studies undertaken as part of the Local Plan preparation. These have all been completed by WSP consultants and therefore have a consistency of approach:

- [Local Plan Transport Study: Assessment and Mitigation Report](#) (2021);
- [Local Plan Transport Study Addendum Technical Note](#) (2021);
- [M65 Junction 5 Strategic Employment Site Transport Study](#) (2021); and
- [M65 Junction 6 and 7 Study](#) (2022).

- 3.33 A further study focusing on potential mitigation options for [Southeast Blackburn](#) was also prepared by Systra. This looks specifically at mitigation options to help reduce traffic congestion on key local routes and increase the range of non-car transport options available to residents. This is referred to as the Southeast Blackburn Transport Strategy. Details on how these studies will inform decisions on s106 contributions are set out in Section 6.

Joint Strategic Needs Assessment (2022-2023)

- 3.34 Joint Strategic Needs Assessments (JSNA) are local assessments of current and future health and social care needs that could be met by the local authority and ICB. [Blackburn with Darwen's JSNA](#) includes a range of quantitative and qualitative evidence, identifying demographic and health trends within the borough. This information supports the need for investment in housing, road safety, air quality and health promoting environments more generally as a result of new development in the borough.

Pharmacy Needs Assessment

- 3.35 The Blackburn with Darwen Health and Wellbeing Board has a statutory duty to complete a [pharmaceutical needs assessment \(PNA\)](#). As the PNA is undertaken on a pan-Lancashire footprint, partner organisations across the wider Lancashire area including Blackpool, Lancashire and Blackburn with Darwen local authorities, work together on the document.

- 3.36 PNAs are used by NHS England to inform decisions regarding applications for new or changes to existing pharmaceutical services and to make decisions in the

² [National Bus Strategy: Bus Service Improvement Plans Guidance to local authorities and bus operators](#) (May 2021)

commissioning of additional services from pharmacies. The Pan-Lancashire PAN currently shows that although there has been a modest decline in overall provision of pharmaceutical service across Blackburn with Darwen compared to 2018, the level of current provision is nevertheless deemed to remain sufficient, although this is a trend that needs to continue to be carefully monitored.

Local Nature Recovery Strategy (LNRS)

3.37 Local Nature Recovery Strategies (LNRS) are locally led collaborative strategies to drive nature's recovery and provide wider environmental improvements established by the Environment Act 2021. Each LNRS will:

- Agree priorities for nature's recovery;
- Map the most valuable existing areas for nature;
- Map specific proposals for creating or improving habitat for nature and wider environmental goals.

3.38 There are 48 LNRS covering the whole of England with no gaps or overlaps. Together they will underpin the Nature Recovery Network, a major commitment in the government's 25 Year Environment Plan.

3.39 In May 2023, the Defra Secretary of State appointed Lancashire County Council as the "responsible authority" to lead the preparation of the [Lancashire LNRS](#). Blackburn with Darwen Council is one of 16 'supporting authorities' to the Lancashire LNRS who are actively involved in the development of the LNRS. Once finalised, the LNRS will be used to guide delivery of Biodiversity Net Gain and green and blue infrastructure associated with development.

4. Means of Securing Infrastructure

Conditions

- 4.1 Planning conditions are the most commonly used and simplest mechanism for securing the provision of on-site infrastructure e.g. roads, sewers, play areas; and ensuring a site is well-designed and appropriate for its intended use.
- 4.2 The long-term maintenance of on-site infrastructure is usually secured through adoption agreements between the developer and a suitable organisation; for example roads and street lighting with the highway authority (BwD); sewers with the utility provider; communal areas and open spaces with a residents' management company.
- 4.3 Section 70(1)(a) of the Town and Country Planning Act 1990 enables the local planning authority in granting planning permission to impose "such conditions as they think fit". Paragraph 55 of the NPPF states "Local planning authorities should consider whether otherwise unacceptable development could be made acceptable through the use of conditions".
- 4.4 The NPPF states at paragraph 56 that planning conditions should only be imposed where they are 'necessary, relevant to planning and to the development to be permitted, enforceable, precise and reasonable in all other aspects'.
- 4.5 Conditions requiring works on land that is not controlled by the applicant, or that requires the consent or authorisation of another person or body, will normally fail the tests of reasonableness and enforceability, unless the land or specified action in question is within the control of a local authority and there is clear evidence that it is enforceable within the time limit imposed by the permission.

Section 106 Agreements

- 4.6 S106 Agreements are made under the provisions of Section 106 (S106) of the Town and Country Planning Act 1990. The NPPF and the NPPG set out national planning policy and guidance and define planning obligations as being "*A legal agreement entered into under section 106 of the Town and Country Planning Act 1990 to mitigate the impacts of a development proposal.*" S106 Agreements can require a developer to provide affordable housing or other specific item(s) of infrastructure on or off-site e.g. a new school or road improvement. Section 106 Agreements are signed before the grant of planning permission and are legally binding.
- 4.7 A local planning authority must ensure that the obligation meets the relevant tests for planning obligations (para 57 of the NPPF), i.e. they are:
 - necessary to make the development acceptable in planning terms;
 - directly related to the development; and
 - fairly and reasonably related in scale and kind to the development.
- 4.8 Planning obligations may only constitute a reason for granting planning permission if they meet the above tests.
- 4.9 The NPPG states that policy for seeking planning obligations should be grounded in an understanding of development viability through the plan making process. Local Plan

Policy CP12 relates to infrastructure and planning contributions. Viability evidence underpinned the production of the Local Plan and this should be used as a starting point when determining viability.

- 4.10 Applicants do not have to agree to a proposed planning obligation, however, this is likely to lead to a refusal of planning permission as an adverse impact of a development would not be mitigated.
- 4.11 The Act provides that a planning obligation may:
- be unconditional or subject to conditions;
 - impose any restriction or requirement for an indefinite or specified period; and
 - provide for payments of money to be made, either of a specific amount or by reference to a formula, and require periodical payments to be paid indefinitely or for a specified period.
- 4.12 Legal agreements and the obligations contained therein run with the land in the same way that a planning permission does. This means that, once the permission is implemented, they are enforceable against the developer who originally entered into the agreement or any subsequent person acquiring an interest in that land. These legal agreements must be registered as a land charge and will form part of the planning register, available for public inspection. Where a planning permission expires, the planning obligation can be removed.

Section 278 Highway Agreements

- 4.13 Blackburn with Darwen Council as the local highway authority may, if it is satisfied it will be of benefit to the public, enter into a legal agreement with a developer under Section 278 of the Highways Act 1980 where a development requires works to be carried out on or adjacent to the highway (usually outside the application boundary).
- 4.14 This agreement can be either for the Council to carry out the works at the developer's expense, or allow the developer to provide the works directly, subject to an approval and inspection process. A condition would be attached to the planning permission requiring the works to be agreed and carried out.
- 4.15 These agreements are prepared separately from any Section 106 Agreement. Works associated with any planning permission are not permitted within the limits of the publicly maintained highway until the agreement is completed and the bond (if applicable) is secured. National Highways has similar powers in relation to the Strategic Road Network.

Community Infrastructure Levy (CIL)

- 4.16 The CIL Regulations came into force on the 6th of April 2010 and is a planning charge used by local authorities to deliver infrastructure. Blackburn with Darwen Council has chosen not to implement CIL, and so will rely on developer contributions from the mechanism identified above to enhance or create suitable infrastructure as needed for new developments. S106 is considered to be most appropriate for Blackburn with Darwen due to the flexibility it allows.

5. Viability, indexation and triggers

Viability

- 5.1 All contributions required by, or to achieve compliance with, local or national policies will be assessed during the consideration of the planning application. There may be instances where due to viability considerations, all contributions sought cannot be afforded if the otherwise plan compliant development is to go ahead.
- 5.2 For certain matters, the adopted Plan specifically allows flexibility in its requirements to recognise viability challenges on a site-by-site basis. In such cases, contributions may be prioritised and/or waived. The waiving of certain contributions on viability grounds would not necessarily be considered to make the development unacceptable in planning terms, but there would also be instances where it would do so. For example, where contributions are considered entirely necessary to make the scheme acceptable in planning terms such that its absence would be wholly unsatisfactory, and the applicant is unwilling to agree to these, viability will not be relevant and an application will be refused. In these cases, such infrastructure is described as necessary and critical.
- 5.3 Applicants should ensure that development proposals adhere to Local Plan and Neighbourhood Plan³ policies and that these requirements are factored into land value. The Local Plan should be treated as the starting point, with the underlying viability evidence demonstrating overall viability.
- 5.4 This reflects NPPG, which states that where up-to-date policies have set out the contributions expected from development, planning applications that comply with them should be assumed to be viable. It is therefore up to the applicant to demonstrate whether particular circumstances justify the need for a viability assessment at the application stage and where needed, provide evidence of what has changed since then. Overpayment for land will not be accepted as a reason for reducing contributions.
- 5.5 A viability appraisal should cover and consider whether viability enhancements could improve the situation, for example deferring triggers for contribution payments. It should be an 'open book' assessment which should include information covering (but not necessarily limited to) the following:
 - Existing use values;
 - Proposed use values (sales and rental);
 - Demolition and construction costs;
 - Finance and marketing costs;
 - Assumed yield;
 - Construction site abnormalities;
 - Development phasing/timetable.
- 5.6 A viability appraisal should be submitted at application stage for any planning application where viability is a factor in determining the application. The viability appraisal will be independently assessed by consultants acting on behalf of the Council and the cost of this will be covered by the applicant. A viability appraisal summary will be included within committee reports where relevant.

³ At the time of writing there are no Neighbourhood Plans adopted by the Council, however some may come into play during the lifetime of the Local Plan and/or this SPD.

- 5.7 A revised viability appraisal will be required where material changes are made following the submission of the planning application, or where there are delays where issues have not been resolved within the timescales originally envisaged.
- 5.8 NPPG provides further information on the expected requirements in relation to viability appraisals, including but not limited to: assessment of land value, inputs and assumptions as well as an open book approach and ensuring accountability. The viability assessment summary will be made available on the Council's online planning register in line with national policy.
- 5.9 A [Local Plan Viability Assessment](#) was undertaken by Keppie Massie in 2021 to inform the Blackburn with Darwen Local Plan. Outputs from this assessment will be used to determine the appropriate s106 requirements for non-allocated sites that come forward for development in the borough.
- 5.10 Table 1 below provides an indication of the expected minimum levels of planning contributions that proposals for new residential development will be expected to be able to bear on non-allocated sites where infrastructure/mitigation is required. In order to take into account the potential increase in costs of infrastructure throughout the lifetime of a planning permission, the level of contributions (excluding affordable housing contributions) will be adjusted and modified in line with an index of inflation. Further details on indexation are provided below.
- 5.11 Figures set out in the table are in addition to the specific policy requirements set out elsewhere in the Local Plan that will have direct cost implications on new development (including affordable housing provision at 20%, water efficiency measures, SuDS, onsite open space and play, playing pitch contributions, biodiversity net gain and provision of electric vehicle charging points i.e the £2,000 referred to in paragraph 5.13). They are based on cost and density assumptions set out in the Local Plan Viability Study and therefore represent indicative minimums only. Where these assumptions vary to specific proposals coming forward then any s106 requirements will also vary.
- 5.12 Contributions are split by the following site typologies as defined in the Local Plan Viability Assessment:
- **Primary** sites are predominantly greenfield sites in higher value areas, many of which are located on or close to the existing settlement boundary. These sites are likely to be developed at a density of around 30 dwellings per net developable hectare, and will provide a range of house types including detached dwellings and a number of larger 4 and possibly 5 bed houses;
 - **Secondary** sites are, in the majority, brownfield sites although there are also a small number of greenfield sites. The sites are mainly infill sites within the existing settlement areas and in some cases may be situated in slightly lower value areas in comparison with the primary sites. Development will typically take place at a slightly higher density of 35 dwellings per net developable hectare; and
 - **Tertiary** sites are brownfield sites situated in the older, inner urban areas of the borough and will be developed at a higher density of around 45 dwellings per hectare with a greater number of smaller dwellings.
- 5.13 Outputs from the Viability Study (and presented in Table 1 below) highlights that the majority of sites within the primary typology (greenfield) are viable and able to support

additional s106 contributions over and above the sum of £2,000 per dwelling already built into the testing. For sites comprising 50-99 units, the Viability Study indicates a more marginal viability position which may require a limited adjustment in policy requirement to achieve the target viability position. This is as a result of the need to provide on-site equipped play for sites of this size. Results for the brownfield typologies show a lower level of viability in comparison to the greenfield sites due to the additional abnormal development costs included in the cost assessments.

- 5.14 In relation to secondary typology sites (greenfield), viability is more marginal and some adjustment of the planning contributions may be required for developments comprising between 10-24 and 50-149 dwellings. For brownfield secondary typologies, results show that it may be difficult to achieve the full plan policy requirements.
- 5.15 Overall, the results from the testing of the tertiary typologies show that it would be difficult to achieve substantive plan policy requirements in all but the higher value locations.

Table 1: Indicative minimum planning contributions new residential development is expected to be capable of providing

Site Type	Greenfield	Brownfield
Primary (30dph)	10-49 units (£1,200/dwelling ⁴) 50-99 units (£0/dwelling ⁵) 100-149 units (£3,300/dwelling) 150-249 units (£3,400/dwelling) 250-499 units (£5,800/dwelling) 500-749 units (£8,600/dwelling) 750+ units (£9,000/dwelling)	10-249 units (£0/dwelling) 250+ units (£2,400/dwelling)
Secondary (35dph)	10-24 units (£0/dwelling) 25-49 units (£1,500/dwelling) 50-149 units (£0/dwelling) 150+ units (£2,600/dwelling)	£0/dwelling
Tertiary (45dph)	n/a	£0/dwelling

Pre-Application Discussions

- 5.16 The Council encourages developers to engage in pre application discussions, to ensure that the likely developer contributions are determined at an early stage in the planning process. It is preferable that negotiations and open discussions are conducted as soon as possible regarding new developments. This minimises chance of delay and helps to ensure the viability of the project.

Indexation

- 5.17 To allow for the fluctuation in prices between the date the s106 agreement is signed and the date payment is made, the level of contributions (excluding affordable housing contributions) will be adjusted and modified in line with an index of inflation. This is

⁴ Based on the [Local Plan Viability Study](#) Table 7.1b, Scheme 1

⁵ Based on the [Local Plan Viability Study](#) Table 7.1b, Schemes 2 and 3 – contribution is lower due to LAP provision requirement on site. Equivalent contribution will be sought if not provided on site

calculated based on the indexation adjustment of the relevant index, from the date the s106 agreement is signed to the expected date of payment. The additional amount paid on top of the financial contribution adjusts the contribution in accordance with inflation. Financial contributions will normally be linked to the Royal Institute of Chartered Surveyors (RICS) Building Cost Information Service (BCIS) indices.

- 5.18 Further details will be included on the Council's Developer Contributions webpage at [Developer contributions | Blackburn with Darwen Borough Council](#).

Timing and triggers for action or payment

- 5.19 S106 monies are usually paid in instalments at key stages during the construction of a development. The stages at which payments are due are known as 'Trigger Points'. For example, s106 contributions could be payable by instalments with 50% paid upon commencement of development and the remaining 50% paid a few months later. As developers have three years to commence a development once planning permission is granted, it can therefore take a number of years before s106 contributions are received by the Council from the time permission was originally granted. Where a development does not commence at all, the s106 will expire.

Forward funding of projects

- 5.20 An important consideration that may apply across s106 typologies, is the requirement for 'forward funding'. The Council may need to spend money in advance of receiving s106 funding in order to meet demand at a specific time, for example, when funding is sought from numerous sources. Accordingly, the s106 may require contributions due under the agreement to be spent in advance for the purposes set out in the s106 before the trigger in the s106 is reached to pay the money to the Council.

6. Contribution types

Affordable housing

Justification

- 6.1 Meeting the shortage of affordable housing has been identified as a major priority by the Government. The NPPF sets out that the Government's objective is to significantly boost the supply of homes and that the need of groups with specific housing requirements are met. It states that the:

"...size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies" and "where a need for affordable housing is identified, planning policies should specify the type of affordable housing required and expect it to be met on site unless; off-site provision or an appropriate financial contribution in lieu can be robustly justified: and the agreed approach contribute to the objective of creating mixed and balanced communities⁶."

- 6.2 The Council is committed to providing for a full range of housing to meet the Borough's future housing requirements. This means ensuring that suitable housing is available for people on low incomes. A specific aim in the Borough's Local Plan is a requirement for developers of new housing to make provision for an element of affordable housing.
- 6.3 Planning obligations for affordable housing will only be sought for residential developments that are major developments. For residential development, major development is defined in the NPPF as development where 10 or more homes will be provided, or the site has an area of 0.5 hectares or more. However, in designated rural areas local planning authorities can choose to set their own lower threshold in plans and seek affordable housing from developments above that threshold. Local Plan Policy DM05 sets out how the Council would assess planning applications for rural exception sites which may come forward over the plan period. Further details on this are included below.

Types of affordable housing

- 6.4 A simple definition of affordable housing is rented housing or low-cost market housing which people entering the housing market could reasonably be expected to afford. A full definition of affordable housing is included within the [NPPF](#) Glossary, and also in Appendix A of the new Local Plan.
- 6.5 Affordable housing includes social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market. Affordable housing should:
- meet the needs of eligible households including availability at a cost low enough for them to afford, determined with regard to local incomes and local house prices; and
 - include provision for the home to remain at an affordable price for future eligible households or, if these restrictions are lifted, for the subsidy to be recycled for alternative affordable housing provision.

⁶ Paras 62 & 63 NPPF

First Homes

- 6.6 In May 2021, a [Written Ministerial Statement](#) and update to the Planning Practice Guidance were issued to introduce a specific kind of discounted market sale housing called 'First Homes'. First Homes have been identified as the government's preferred discounted market tenure that should:
- Be discounted by a minimum 30% against the market value;
 - Be sold to those who meet the First Homes eligibility criteria;
 - On their first sale, will have a restriction registered on the title of the property at HM Land Registry to ensure this discount (as a percentage of current market value) and certain other restrictions are passed on at each subsequent title transfer; and
 - After the discount has been applied, the first sale must be at a price no higher than £250,000.
- 6.7 This is the minimum criteria a First Home must meet and would be considered to meet the definition of 'affordable housing' for planning purposes.
- 6.8 Through Local Plan Policy CP4: Housing Development, the Council requires the provision of at least 25% of all affordable housing units on a development site to be First Homes.

Eligibility criteria

- 6.9 The national eligibility criteria for purchasers of First Homes includes the following:
- A purchaser (or, if a joint purchase, all the purchasers) of a First Home should be a first-time buyer as defined in [paragraph 6 of schedule 6ZA of the Finance Act 2003](#) for the purposes of Stamp Duty Relief for first-time buyers;
 - Purchasers of First Homes, whether individuals, couples or group purchasers, should have a combined annual household income not exceeding £80,000 (or £90,000 in Greater London) in the tax year immediately preceding the year of purchase;
 - A purchaser of a First Home should have a mortgage or home purchase plan (if required to comply with Islamic law) to fund a minimum of 50% of the discounted purchase price.
- 6.10 These national standard criteria will also apply at all future sales of a First Home.
- 6.11 As part of planning obligations secured through s106 agreements, local authorities can apply local eligibility criteria to First Homes in addition to the national criteria. These criteria are set out below:
- **Lower income caps** – the income cap for those eligible to access First Homes can be lowered if it can be justified with reference to local average first time buyers' income. Any locally set income caps should be considered with reference to mortgage requirements and loan-to-income ratios for appropriate homes for the area's identified target market for First Homes. Income caps should not be set at a level which would prevent a borrower from obtaining a 95% loan-to-value mortgage for the discounted price of suitable properties.
 - **A local connection test** can be applied which may include but is not limited to, current residency employment requirements, family connections or special

circumstances. The application of these discretions should be administered carefully and ensure that they do not limit the eligible consumer base to the point that homes become difficult to sell.

- **Criteria based on employment status** can also be introduced based on employment status so that key/essential workers are able to access affordable housing. The definition of keyworker should be determined locally and could be any person who works in any profession that is considered essential for the functioning of a local area.

Local eligibility criteria

6.12 In Blackburn with Darwen, additional local criteria to ensure eligible applicants have a local connection to the borough will apply to all First Homes on initial sales and resales for a period of 3 months from when a home is first marketed. A local connection will be assessed based on the following criteria:

- The person is ordinarily a resident who has lived in Blackburn with Darwen for 36 consecutive months; or
- Has a requirement to live within Blackburn with Darwen due to their employment as a keyworker/essential worker (meaning a person employed or with a confirmed job offer in health and social care; or education and childcare; or public safety and national security).

6.13 A summary of the eligibility criteria the Council will use to assess applications for First Homes (and other discounted market options) is included within Appendix A.

6.14 In accordance with national Planning Practice Guidance, if a suitable buyer has not reserved a home after 3 months, the eligibility criteria (including income caps) will revert to the national criteria set out above, to widen the consumer base. Furthermore, the local eligibility criteria will be disapplied for all active members of the Armed Forces, divorced/separated spouses or civil partners of current members of the Armed Forces, spouses or civil partners of a deceased member of the armed forces (if their death was wholly or partly caused by their services) and veterans within 5 years of leaving the armed forces.

Securing s106 agreements for First Homes

6.15 Section 106 agreements should be entered into that secures the delivery of First Homes and ensures that a legal restriction is registered onto a First Homes' title on its first sale. The government has [published a template planning obligation](#) for this purpose, which the Council will use as a basis for agreements prepared locally.

6.16 When a First Home is sold by the developer to the first owner, a restriction is to be entered onto the title register identifying the unit as a First Home. This restriction should ensure that the title cannot be transferred to another owner unless the relevant local authority certifies to HM Land Registry that the First Homes criteria and eligibility criteria have been met, including the discounted sale price.

Rural Exception sites

6.17 The NPPF describes rural exception sites as follows:

'In rural areas, planning policies and decisions should be responsive to local circumstances and support housing developments that reflect local needs. Local planning authorities should support opportunities to bring forward rural exception sites

that will provide affordable housing to meet identified local needs, and consider whether allowing some market housing on these sites would help to facilitate this’.

- 6.18 Local Plan Policy DM05: Rural Exception Sites allows for affordable housing development on rural sites that would not normally be released for housing development. To enable this exception, it needs to be demonstrated that there is a proven need for the number and type of dwellings proposed. In accordance with national policy, all new homes on these sites will remain affordable in perpetuity to people in housing need who have a local connection with the parish or appropriate adjoining parishes. Sites will be well-related to the existing built-up areas of towns and villages. Where family homes are proposed priority will be given to locations within a reasonable walking distance of a primary school.
- 6.19 Where it can be clearly demonstrated from a viability perspective through evidence that the site cannot support a scheme comprising 100% affordable housing, the Council will consider an element of open market housing, limited to that required to facilitate scheme viability to a maximum of 50% of the overall scheme, provided that the housing is to meet local needs justified by the best available evidence.
- 6.20 As outlined in the supporting text for Local Plan Policy DM05, all rural affordable housing proposals submitted under this policy must be accompanied by a local housing need survey. This will provide information on the number of households that are currently and likely to be in housing need in the next five years, their incomes and the type of accommodation required to meet their housing need. When a proportion of market housing is proposed on a rural exception site, the local housing needs survey must identify the type of market housing that is required. If a survey of local housing need supporting an application has been conducted more than four years prior to a planning application being submitted, the Council will require the housing need and affordability data to be updated.

Local Needs

- 6.21 A full assessment of affordable housing need was carried out in the [2018 Housing and Economic Needs Assessment \(HENA\)](#) report to identify requirements for the Borough over the Plan period. The methodology used follows the national PPG to consider the key variables that need to be accounted for to accurately assess current and future supply and demand. The analysis also takes account of the local housing costs and estimates of household income.
- 6.22 The 2018 HENA report considers the short-term need for affordable homes over the next 5 years to be 108 homes per annum; however, the study does note that this should not be taken directly as a target. In order to ensure this requirement is met, Local Plan Policy CP4: Housing Development requires residential developments of 10 or more dwellings to provide 20% affordable units. This is based on the maximum level of contributions that can viably be provided, demonstrated through the [Local Plan Viability Study](#) which summarises the findings of testing 20% affordable housing provision in the most viable ‘Primary’ typology, greenfield sites.

Viability considerations

- 6.23 The Plan Viability Study has considered the full policy requirements of 20% affordable housing. In light of the Covid-19 pandemic there is a degree of uncertainty with regard to the property market so additional sensitivity testing was undertaken to ‘stress test’ the financial viability assessment results. The viability testing already carried out at the high

and low value position demonstrates the change in viability with house price increases/reductions equivalent to +/- 4.6% from the average position. This further sensitivity testing demonstrates the impact of changes in landowner and developer returns and also changes to construction costs (inclusive of fees and contingencies).

- 6.24 The viability assessment recognises that in certain circumstances there may need to be a balance achieved between any requirements for affordable housing and s106 contributions; however, the sensitivity testing demonstrates that on considering a range of typologies only limited adjustments may be required to achieve a viable position. Section 5 of this document provides additional information on the Council’s approach to viability in schemes.

Location, type and tenure mix

- 6.25 Elements of the 2018 HENA report were updated in 2021 with an economic needs update (referred to as the HENA 2021 update). Data from the HENA 2021 update report was used to further inform the borough wide demand for house sizes, mix and tenure split between rent and shared ownership. The final mix is determined as site specific, but Table 2 below provides an indication of the likely split for on-site affordable housing requirements, based on the scale of the residential development proposed.

Table 2: Indicative requirements for on-site provision of affordable homes

Scale of development (dwellings)	Total no. of affordable homes required (i.e 20%)		No. of First Homes required (25%)	Remainder in line with Local Plan Policy CP4 (75%)	
				Social/Affordable Rent (60%)	Intermediate (15%)
10	2		1	1	0
15	3		1	2	0
20	4		1	2	1
25	5		1	3	1
50	10		3	6	1
100	20		5	12	3
250	50		12	30	8
500	100		25	60	15
1,500	300		75	180	45

- 6.26 In finalising the split of on-site affordable housing on a residential development, the Council consults the ‘BwithUs’ scheme for up to date local demand data. BwithUs is a choice-based lettings scheme, which was developed by the Council and Together Housing for Blackburn with Darwen and which now operates across Pennine Lancashire.
- 6.27 The Council also consult with Adults and Childrens commissioning teams on strategic demand for older persons, specialist or adaptive housing needs. Data from these sources is then used to guide housing mix required in specified locations to ensure that the affordable housing provides an acceptable range of types and size of units to meet up to date demand. Information within the Blackburn with Darwen Joint Strategic Needs Assessment 2022-2023 (or future iterations) can also help to support these discussions by providing demographic data and trends, for example about the ageing population or numbers of carer within the borough.

6.28 If housing is being delivered in phases, affordable housing should be delivered evenly throughout the duration of delivery and not back-loaded onto later phases. In some instances, the viability of a scheme may require that affordable housing is back-loaded, but the Council will resist granting permission to proposals with the provision of no or very low levels of affordable housing in earlier phases where viability is not a consideration.

Off-site provision/contributions

6.29 NPPF states that where a need for affordable housing is identified, planning policies should specify the type of affordable housing required, and expect it to be met on-site unless:

- a. off-site provision or an appropriate financial contribution in lieu can be robustly justified; and
- b. the agreed approach contributes to the objective of creating mixed and balanced communities.

6.30 In line with the NPPF, the Council will normally expect the affordable housing requirement to be met on-site, unless the specific circumstances of the site or the type of development proposed mean this is inappropriate. In these circumstances, provision will be made through a financial contribution (commuted sum).

6.31 On developments of 10 or more units, the Council will therefore require the developer to provide 20% affordable housing in descending order of priority:

1. On-site provision of agreed affordable house types;
2. Commuted sum payments equating to the 20% provision required.

6.32 Landowners and developers are expected to fully consider the overall costs of development, including the required planning obligations prior to negotiating the sale or purchase of land. Consequently, the overall cost of the development should include the provision of affordable housing, whether provided on-site, off-site, or via a commuted sum.

6.33 As highlighted above, there may be limited circumstances where it would be more appropriate for the affordable housing to be provided either partly or wholly off-site. In such circumstances the Council will seek to secure alternative provision in the vicinity of the development site or elsewhere in the borough in an area of housing need.

What is the s106 requirement?

6.34 Where a commuted sum payment is used in lieu of on – or off-site provision, the following formula is applied to calculate the payment:

- For affordable rent the commuted sum required is 50% of the Open Market Value (OMV); and
- For shared ownership a 35% discount on OMV is sought.

6.35 However, the Council is mindful that some urban sites are proposing to provide 3 and 4 bed larger family homes of higher value which could potentially range from £150,000 to in excess of £300,000. Firstly, the Council considers that the higher value properties would require a greater discount from developers and could potentially impact on

scheme viability. Secondly, the higher value properties would indeed be more affordable if they were discounted but not necessarily be affordable to residents on average income. As such the Council carried out an exercise to gauge affordability levels to determine an average price for affordable units which would be more realistic for residents and would be supportive of new developments.

6.36 The Council considered a number of schemes across the borough and looked at price ranges alongside considering affordability for low wage earners as first-time buyers and also those wishing to staircase upwards from their current home. To this extent it was determined an average price of £150,000 (Open Market Value) for an affordable home would be appropriate. This price was also supported by developers involved in masterplanning and s106 negotiations across the Borough.

6.37 For further clarity and to provide a level of certainty for developers on s106 requirements by the Council, it was decided that an average value for commuted sum payment of 42.5% (50% + 35% = 85% / 2 = 42.5%) of the agreed OMV should be taken.

6.38 The formula for calculating the contribution per unit for affordable housing is therefore:

Affordable housing s106 calculation (schemes comprising 10 or more dwellings)
<p>Total No. of dwellings</p> <p style="text-align: center;">x</p> <p>42.5% of the agreed Open Market Value (£150,000)</p> <p style="text-align: center;">x</p> <p>20% (dwellings that would be affordable) / No. of dwellings</p>

Example

100 x (42.5% of £150,000) x 20% = £1,275,000
 £1,275,000 / 100 = **£12,750 per dwelling.**

Off-site Affordable Housing s106 requirement (schemes comprising 10 or more dwellings)
<p>£12,750 per dwelling</p>

6.39 The limited circumstances where off site provision of affordable homes via commuted sum would be appropriate would be discussed at pre-application/planning application stage with applicants. Such decisions would be based on a number of factors existing at that point in time, including areas of identified affordable housing need and land availability. Final proposals will rely on Registered Provider (RP) partners' deliverability and scheme viability.

6.40 If the developer considers that the affordable housing requirement makes the development unviable, it will be necessary for the developer to complete a scheme viability assessment which includes affordable housing provision. The Council will require the developer to supply evidence as to the financial viability of the development.

This will normally take the form of an open book financial appraisal of the proposed development, demonstrating the full range of costs to be incurred by the development including the initial purchase of the land, the financial return expected to be realised, and the profit expected to be released. The level of detail required in such an appraisal will always be proportionate to the scale and complexity of the development proposed.

- 6.41 Viability Appraisals which are submitted with planning applications in order to negotiate a reduction in contributions will be independently assessed, with costs borne by the applicant. Fees will be dependent on the scale of development and can be accessed at [Development Viability | Blackburn with Darwen Borough Council](#). Further information on development viability can be found in Section 5.

Affordable Housing Design

- 6.42 Wherever practicable, affordable housing design should be tenure blind. It should be physically indistinguishable from the market housing and on larger sites be distributed across the site in small clusters, rather than concentrated on one or two parts of the site. Affordable housing should be distributed in a way which ensures that access to key facilities such as schools, local shops and open space is equivalent to that provided for market homes.
- 6.43 Local Plan Policy DM03: Housing Mix, Standards and Densities requires that, in residential schemes of 10 dwellings or more, 5% of new homes should be built to the higher M4(3) wheelchair adaptable standard. These should also be provided within rented tenure units.

Vacant Building Credit (VBC)

- 6.44 [National policy](#) provides an incentive for brownfield development on sites containing vacant buildings. This requires affordable housing requirements to be reduced based on the quantity of floorspace being brought back into use or replaced. Vacant Building Credit (VBC) is intended to incentivise the re-use of buildings or sites that would otherwise remain vacant or become derelict. It is not intended as a back-door means of reducing Affordable Housing contributions on otherwise viable sites.
- 6.45 Affordable housing contributions will be sought for any additional increase in floorspace, which will be calculated in the same way as any other development. A 'credit' should then be applied which is the equivalent of the gross floorspace of any relevant vacant buildings being brought back into use or demolished as part of the scheme and deducted from the overall affordable housing contribution calculation.
- 6.46 Satisfactory evidence should be provided to demonstrate that the site meets the definition of 'previously developed land' in the NPPF. VBC will only apply when, in the Council's opinion, the building has not been abandoned, the assessment for which will take into consideration the following factors: the condition of the property; the period of non-use; whether there is an intervening use; and any evidence regarding the owner's intention, including attempts to sell the property.
- 6.47 The Council will also consider whether the building has been made vacant for the sole purpose of redevelopment and may require the applicant to provide records to demonstrate that vacancy has arisen for other reasons. Relevant planning history will also be assessed to ensure that the building is not covered by extant or recently expired permission for the same or similar development.

6.48 Although the NPPG does not provide a definition of what constitutes vacant, CIL regulations provide a framework for “in-use” (i.e., not vacant). This requires lawful use for a continuous period of at least six months within the three years ending on the day planning permission first permits the chargeable development. The Council therefore considers that VBC is only available where Applicants can evidence that the building is currently vacant and has not been in continuous use for any 6-month period within the preceding 3 years from the day the planning application is validated.

Education provision

Justification

6.49 Schools are a crucial element of local infrastructure and therefore provision of school places must be considered alongside the delivery of new homes. The NPPF notes the importance of having a sufficient choice of school places available to meet the needs of existing and new communities. The NPPF states that local planning authorities should:

- give great weight to the need to create, expand or alter schools through the preparation of plans and decisions on applications; and
- work with school promoters, delivery partners and statutory bodies to identify and resolve key planning issues before applications are submitted.

6.50 Planning applications, especially those relating to the largest developments will be expected to contribute to education provision serving the development. This may include serviced land as well as financial contributions. Discussions should be undertaken at an early stage with the Council to ensure appropriate and well-located facilities can be delivered in a timely way. This includes having regard to the demand for mainstream education, Special Educational Needs and Disabilities (SEND) and early years places based on forecasted pupil yield.

Assessing sufficiency of places

6.51 It is important that the impacts of development on education provision are adequately mitigated, requiring an understanding of:

- The education needs arising from development, based on an up-to-date pupil yield factor;
- The capacity of existing schools that will serve development, taking account of pupil migration across planning areas and local authority boundaries;
- Available sources of funding to increase capacity where required; and
- The extent to which developer contributions are required and the degree of certainty that these will be secured at the appropriate time.

6.52 The government has updated its guidance on [Delivering schools to support housing growth](#) which should be used by local authorities planning for education to support housing growth and seeking associated developer contributions. This update involved the publication of an updated version of its guidance on [Securing developer contributions for education](#) and the addition of new guidance on [Estimating pupil yield from housing development](#), which will be used to determine s106 requirements for relevant development sites.

6.53 To support the new Local Plan, a detailed pupil forecast modelling exercise has been carried out by Edge Analytics (2021) on behalf of the Council, to assess and identify

future demand for school places. The model uses school census data, future housing growth figures, primary and secondary pupil yield information, migration information, pre-school population data and projected birth rates to determine the need for additional primary and secondary school places until 2037, aiming to maintain a 10% surplus of places across the Borough in accordance with best practice.

- 6.54 The model identifies a shortfall in primary and secondary school places across the borough as a result of new housing developments. As a result, education contributions will be sought in relation to outline or full applications for all major housing developments (10 or more family homes of 2+ bedrooms) which are likely to result in the need for additional education provision.
- 6.55 As a development may be implemented within 3 years of the granting of planning permission and may not be completed until some years later (especially for major or phased developments,) the education contribution may not actually be available to the Council at an appropriate time to deliver the necessary related projects. For example, payment of an education contribution may not be made until the first house on a development is occupied but many more houses may become occupied at or around the same time and accommodate children who need school places. Basic Need or Local Authority borrowing may therefore be required as forward funding to make provision for the children occupying the development, which will then be retrospectively recouped from the education contribution when paid, including any borrowing costs.
- 6.56 The Council will be commissioning updated pupil forecast modelling work in the coming months. Updated outputs will be made available on the Council's Planning webpage at [Planning policies, strategies and guides | Blackburn with Darwen Borough Council](#).

Cost of Additional Places

- 6.57 The Council's Education department uses pupil yield factors to forecast the education needs for each phase and type of education provision arising from new development. As well as being useful for pupil place planning across the borough, pupil yield factors also allow an estimate of the number of school places required as a direct result of development, underpinning the contributions agreed in planning obligations.
- 6.58 The DfE has developed a recommended methodology for estimating pupil yield from housing development, to assist local authorities demonstrating the need for education facilities in the consideration of planning applications. The [Pupil Yield Dashboard](#) provides pupil yield factors for each local authority in England and this is used by the Council's Education department to identify the need for additional school places as a result of new developments within the borough.
- 6.59 A pupil yield factor of 0.38 per family home is currently identified for primary schools and 0.22 per family home for secondary schools. For SEND provision, a pupil yield factor of 0.01 is identified.
- 6.60 The amount of money that the Council will seek to secure through developer contributions for education provision will reflect the cost of providing school places. The assumed cost of mainstream school places on national average costs are based on the published DfE school place scorecards.⁷ This differentiates between the average per pupil costs of a new school, permanent expansion or temporary expansion, ensuring

⁷ [Local authority school places scorecards - GOV.UK \(www.gov.uk\)](#)

developer contributions are fairly and reasonably related in scale and kind to the development.

6.61 However, these costings were identified in May 2022 and it is acknowledged that these are likely to have increased since then. At a minimum, therefore, costs will be index linked to inflation to reflect up to date costings for such projects. Any updates to the costings within the Scorecard will be used to inform calculations for additional school places.

Primary school places

6.62 The DfE Pupil Yield Dashboard estimates an average primary-school pupil yield of 0.38 for every new family home. Based on recent housing developments that approximately 31% of new pupils were estimated to have resulted from migration to the borough to fill the new homes – applying this to each of the yields, estimates the “net” effect of population movement into the borough reducing the pupil yield estimates.

6.63 The Government’s latest Local Authority School Places Scorecard sets out an average current cost per place for permanent primary school expansion (£19,425), temporary primary school expansion (£9,184) and new primary school projects within the borough (£23,192). The most up to date costs included within the Scorecard will be used to calculate the required contributions.

6.64 Where the Council’s Education department identifies a need for additional primary school places as a result of a new major development, the developer contribution will therefore be calculated using the formula:

<p style="text-align: center;">Education - primary school place s106 calculation (schemes comprising 10 or more family homes of 2+ bedrooms)</p>
<p style="text-align: center;">Number of houses x 0.38 pupil yield factor x 0.31 migration factor = number of pupils generated x cost of primary school place</p>

6.65 In order to meet the shortfall of primary school places identified in the pupil forecasting work as a result of housing growth in the Local Plan, the Council’s Education department has identified a number of infrastructure projects needed to provide the required additional places which will be funded through developer contributions. These projects are identified within the latest [IDP](#), including indicative costings, and include:

- Provision of additional primary school places in the Borough through extensions to existing primary schools;
- Increase capacity at Lammack Community Primary School from 490 places (70 per year group) to 630 places (90 per year group);
- Delivery of a new one-form entry primary school in West Blackburn if required; and
- Extension of St Peter’s CE Primary School, Darwen if required.

Secondary school places

- 6.66 The DfE Pupil Yield Dashboard estimates an average secondary-school pupil yield of 0.22 for every new family home. A migration factor of 31% is also included within the developer contribution calculation for secondary school provision.
- 6.67 The Government's latest Local Authority School Places Scorecard sets out an average current cost per place for permanent secondary school expansion (£26,717), temporary secondary school expansion (£10,310) and new secondary school projects within the borough (£28,096).
- 6.68 The developer contribution for each new family home is therefore calculated using the formula below:

Education - secondary school place s106 calculation (schemes comprising 10 or more family homes of 2+ bedrooms)
Number of houses x 0.22 pupil yield factor x 0.31 migration factor = number of pupils generated x cost of secondary school place

- 6.69 The Pupil Forecasting work undertaken in 2021 identified a need for an additional 810 secondary school places across the borough over the plan period to 2037. In order to meet this shortfall, the Council has progressed feasibility works to determine the capacity of existing Secondary Schools and identify opportunities to deliver extensions, providing the additional places needed.
- 6.70 It is recognised that many homes included within the future trajectory already have planning permission, some will be approved as minor applications, and some sites are already required to contribute towards primary school places through adopted masterplans. In most of these scenarios a developer contribution towards secondary school places would not be triggered, however there could be exceptions as each application will be assessed on its own merits.
- 6.71 The projected need figures presented above are based on a number of long-term factors which will change over time. The developer contributions requested will therefore be kept under review and revised from time to time if required in light of updated data.

SEND provision

- 6.72 New housing developments will also result in an increase in the number of SEND places required, and DfE advises authorities to seek developer contributions for all special school/SEND places generated by a development, where there is a documented need for additional SEND provision. The SEND forecast work undertaken by Edge Analytics identifies a continued growth in the total number of SEND pupils over the period to 2031/32 which will result in the need for additional SEND places. The Council will therefore also require developments of 10 or more dwellings consisting of new family homes (2+ bedrooms) to fund the provision of additional special school/SEND places generated as a result of the new homes.

6.73 Special schools require more space per pupil than mainstream schools, and this needs to be reflected in the assumed costs of provision. The Council will set the costs of special or alternative provision school places at four times the cost of mainstream places, which is consistent with the additional space requirements in Building Bulletin 104⁸.

Table 3: Costs for the provision of SEND places

School type	Cost per place ⁹	SEND multiplier	Cost per place (SEND)
Primary			
Permanent primary school expansion	£19,425	x4	£77,700
Temporary primary school expansion	£9,184	x4	£36,736
New primary school	£23,192	x4	£92,768
Secondary			
Permanent secondary school expansion	£26,717	x4	£106,868
Temporary secondary school expansion	£10,310	x4	£41,240
New secondary school	£28,096	x4	£112,384

6.74 The DfE Pupil Yield Dashboard estimates an average SEND pupil yield of 0.01 for every new family home, and therefore the developer contribution for each new family home is calculated using the formula below:

Education - SEND school places¹⁰⁶ calculation (schemes involving 10 or more family homes of 2+ bedrooms)
<p>Number of houses x 0.01 pupil yield factor x 0.31 migration factor</p> <p style="text-align: center;">=</p> <p style="text-align: center;">number of pupils generated</p> <p style="text-align: center;">x</p> <p style="text-align: center;">cost of SEND school place</p>

Early years' provision

6.75 There is currently no requirement for additional nursery provision in the Borough at the present time. Private nursery provision is commercially driven and population growth in the Borough as a result of planned new housing development set out in the Local Plan should help to sustain providers who currently have surplus provision. This position will be kept under review as part of updates to the Infrastructure and Delivery Plan (IDP).

⁸ [Primary and secondary school design - GOV.UK \(www.gov.uk\)](http://www.gov.uk)

⁹ Local Authority School Places Scorecard

Transport and travel improvements & highways infrastructure

Justification

- 6.76 The NPPF requires the planning system to promote sustainable travel. It also states that transport issues should be considered from the earliest stages of plan making and development proposals. When assessing development proposals, it should be ensured that any significant impacts from the development on the transport network, or on highway safety can be cost effectively mitigated to an acceptable degree.
- 6.77 The levels of growth and development envisaged in the plan will place additional demands on transport and highway networks and planning obligations can be used to mitigate against these effects.
- 6.78 Blackburn with Darwen is the local highway authority and has the primary responsibility for providing and maintaining transport infrastructure and some bus services in the Borough. As a statutory consultee, it is consulted on all applications for which s106, s278 or s38 works or contributions may be required.
- 6.79 Developer contributions sought through a section 106 agreement may be used by the Highway Authority to carry out improvements to the highway network to accommodate the development. This mechanism can also allow the Highway Authority to seek contributions towards travel planning, public transport services, sustainable travel and pedestrian and cycle infrastructure, provided that the NPPF planning tests are met.
- 6.80 There are a number of studies that will help to inform the contributions required for a particular development; further details on these are outlined below and will be included within the latest version of the Council's Infrastructure Delivery Plan (IDP).

Local Plan transport studies

- 6.81 As identified in Section 3, a number of transportation studies have been prepared as part of the Local Plan to assess the potential impacts of development on both the strategic and local transport networks. Junctions that are identified as requiring mitigation during the plan period are incorporated into the list of [highways](#) infrastructure works within the Infrastructure Schedule which was updated as part of the Local Plan submission, in addition to an updated [sustainable transport](#) list. As the IDP is a living document, these will be incorporated into the next version of the report when it is produced, and updated periodically through the Local Plan period.

Local Transport Plan (LTP) 4

- 6.82 The Transport Authorities of Blackburn with Darwen, Blackpool and Lancashire are currently in the process of preparing a Joint Lancashire Local Transport Plan (LTP4). LTP4 will set the key strategic transport priorities for the county, alongside an investment programme.
- 6.83 The Local Plan sets out policies that are expected to align with LTP4 to ensure that transport provision across the Borough is sustainable and safe and that negative environmental impacts, such as noise and air pollution, can be avoided or mitigated. In particular with regards to planning applications, regard should be had to promoting modal shift, as well as the management of highway impacts where those impacts would be directly related to the development proposed.

Local Cycling and Walking Infrastructure Plans (LCWIP)

- 6.84 The Blackburn with Darwen Borough Council LCWIP proposes numerous improvement schemes across the borough towards the delivery of a comprehensive active travel network. Where developments are likely to directly impact on the improvement schemes identified within the LCWIP and these have not yet been delivered, a financial contribution may be sought towards their delivery.
- 6.85 All development must facilitate walking and cycling in its design and should link to existing cycling routes where possible. If it is not possible to do this through scheme design and layout, a financial contribution may be sought to ensure the development delivers appropriate safe sustainable walking and cycling links in accordance with Policy DM29 of the Local Plan. Where a development site is not within a location covered by an LCWIP, the development must facilitate walking and cycling in its design and should still link to existing cycling routes where possible. If it is not possible to do this through scheme design and layout, a financial contribution may be sought to ensure the development delivers appropriate safe sustainable walking and cycling links in accordance with Policy DM29 of the Plan. Where a development links to an existing walking and cycling route identified as in need of upgrading, a developer contribution may be requested towards these improvement works due increased usage as a result of the development.
- 6.86 Development will also be expected to enhance or improve the permeability of public rights of way (PROWs) for pedestrians, cyclists, and horse-riders. Proposals must not result in the loss of, or deterioration in the quality of, PROWs in accordance with Policies 16 (Green and Blue Infrastructure) and 29 (Transport and Accessibility) of the Local Plan.
- 6.87 Since June 2023, Active Travel England (ATE) is a statutory consultee on all planning applications for developments equal or exceeding 150 housing units, 7,500m² of floorspace or an area of 5 hectares. ATE will help planning authorities in their work to implement good active travel design – for example, by ensuring developments include walking, wheeling and cycling connectivity to schools and local amenities.

Bus Service Improvement Plan

- 6.88 The new Bus Service Improvement Plan (BSIP) developed by Lancashire County Council, Blackburn with Darwen Council, and bus operators, outlines how buses could be made the transport mode of choice for many more people under the government's Bus Back Better strategy, which has set aside £3bn to transform services across the country.
- 6.89 Lancashire's BSIP describes how an injection of £165m could be used to create a network of 'Superbuses' with frequent services throughout the week and weekends, offering passengers significantly improved journey times thanks to investment in highways such as bus lanes and 'bus priority' measures on traffic lights at junctions. It also outlines how more funding would also allow the development of more consistent and accessible timetable information, making it easier for people to catch their local bus. A further priority would be for all bus operators to adopt a London-style single shared ticketing system to make travel simpler, and to introduce a standard half-fare ticket for 16 to 19-year-olds. The plan also sets out that the initial challenge facing bus operators is to restore passenger numbers to pre-Covid levels.
- 6.90 Measures currently included in the BSIP have been added to the Infrastructure Delivery Schedule within the Infrastructure Delivery Plan. The BSIP will be updated annually to enable the Council to remain flexible to changes and demands.

- 6.91 All development must facilitate public transport accessibility in its design and should link to existing public transport routes and services where possible. If it is not possible to do this through scheme design and layout, a financial contribution may be sought to ensure the development delivers appropriate public transport services and infrastructure in accordance with Policy DM29 of the Plan.

Blackburn with Darwen Local Plan (2021-2037)

- 6.92 Local Plan Policy DM29: Transport and Accessibility requires Transport Statements, Transport Assessments and/or Travel Plans to support a planning application, depending on the development type and size. These documents provide an assessment of the likely transport impacts of the development in question. Where impacts cannot be fully mitigated, sustainable transport and highways planning obligations will be sought, informed by these documents in addition to those projects identified through the IDP (supported by the evidence base outlined above).
- 6.93 The cumulative transport impact of development proposals will also be taken into account as set out in the Local Plan, which may mean that smaller schemes may be requested to make appropriate contributions towards schemes which are required to address the combined impacts of future growth.
- 6.94 Non-financial contributions towards sustainable transport may also be required and may include establishing car clubs, providing electric vehicle charging infrastructure, land for Rights of Way improvements, and safe cycle storage. This may be particularly important at transport hubs and interchanges.

Calculating Contributions for South-East Blackburn Sites

- 6.95 The Blackburn with Darwen Local Plan (2021-2037) allocates a number of sites for development within the South-East area of Blackburn, including the 22-hectare Strategic Employment Site to the south of the M65, close to Junction 5. Due to the scale of growth identified in this location, significant highways and transport infrastructure is required to support the cumulative impact of these sites on the highways network.
- 6.96 The package of infrastructure measures identified include a significant upgrade to M65 Junction 5, the delivery of an Active Travel Network comprising around 18km of walking and cycling improvements across South-East Blackburn and other measures to support access and accessibility in relation to the delivery of the Strategic Employment Site.
- 6.97 The Council has secured £20m from the Levelling Up Fund (LUF) to contribute towards the M65 Junction 5 Improvement Scheme and the South-East Blackburn Active Travel Network works, however, there remains a shortfall of £11m to fund these schemes (excluding an additional £3m shortfall relating to site specific costs associated with the Strategic Employment Site at Junction 5 of the M65, as identified in Appendix B) to be secured from alternative funding sources, including developer contributions).
- 6.98 To ensure this funding shortfall is reasonably apportioned in scale and kind to all sites that directly impact on the need for the identified infrastructure, a specific, formula-based approach to calculating highway and transport & travel improvements, based on assumed trip generation rates, will be applicable to relevant sites in South-East Blackburn. The Council has prepared a note to provide additional details for calculating, and justification of, developer contributions in this area of the borough. This is included as Appendix B on page 56.
- 6.99 The Council acknowledges that the contributions for each site may need to be reviewed where trip generation arising from any development (justified in Transport Assessment accompanying the planning application) differ significantly from those identified.

- 6.100 Furthermore, if the required contribution identified for a site cannot be fully secured on the grounds of viability, the Council will also seek contributions from windfall sites where appropriate and other grant/funding streams to fill any shortfalls in funding.
- 6.101 Where additional infrastructure improvements/mitigation measures to those listed in Appendix B are proven directly related to a development in South-East Blackburn (i.e. those identified through any future transport studies/evidence and updated versions of the Council's IDP) contributions may be sought towards those as well. These will be sought in line with Local Plan Core Policy CP12: Infrastructure and Delivery and so will take account of the total contribution liability.
- 6.102 For sites that come forward for development elsewhere in the borough, the s106 highways and transport requirements will be identified on a case-by-case basis with input from the Highways Authority and relevant evidence base studies. This will ensure the Council secures developer contributions that are reasonably apportioned in scale and kind to the relevant site.

S278 agreements

- 6.103 In addition to s106 agreements, section 278 (s278) agreements can be used as a mechanism to secure highway measures that cannot be addressed through the design of the proposed development. S278 agreements are used when the proposed works relate to the existing highway network, and Section 38 of the Highways Act is used where new highways are to be created within the application site. On occasions where the developer is solely responsible for delivering works, a s278 agreement may be used in place of s106, secured by way of Grampian condition. This will only apply to matters relating to timing and delivery, rather than the detail of the works.

Transport and travel improvements s106 requirement

For allocated sites located within South-East Blackburn¹⁰, s106 contributions required to fund the necessary transport and travel improvement works in this location will be reasonably apportioned in scale and kind to each relevant site. Individual site contributions are identified in Appendix B.

For sites located outside of this area, contributions will be determined on a site-by-site basis, using information contained within the Transport Assessment submitted as part of the planning application, Local Plan transport evidence base, LCWIP and BSIP infrastructure requirements. Refer to latest Infrastructure Delivery Plan (IDP) for relevant schemes.

¹⁰ As identified in accompanying note (Appendix B) but may also include windfall sites where appropriate.

Highways infrastructure s106 requirement

For allocated sites located within South-East Blackburn¹¹, s106 contributions required to fund the necessary highway infrastructure works in this location will be reasonably apportioned in scale and kind to each relevant site. Individual site contributions are identified in Appendix B.

For sites located outside of this area, contributions will be determined on a site-by-site basis, using information contained within the Transport Assessment submitted as part of the planning application, Local Plan transport evidence base. Refer to latest Infrastructure Delivery Plan (IDP) for relevant schemes.

Health infrastructure

Justification

- 6.104 The NPPF outlines the importance of promoting healthy and safe communities, stating that planning authorities should work with delivery partners to plan for required public service infrastructure facilities.
- 6.105 Housing development can add substantially to the demand for health care as it generates population growth in given areas. It is important that the planning system ensures not only that development creates an environment that supports health and wellbeing; but that there should be a reasonable level of developer contributions towards the capacity and resilience of health facilities. Additionally, demographic factors such as an ageing population and wellbeing needs of the population including secondary and specialist support services, should also be considered in terms of provision of health infrastructure to support the needs of area.
- 6.106 The Council works closely with key stakeholders in the health and wellbeing sector, including the Lancashire and South Cumbria Integrated Care Board (ICB) and the Council's Public Health department, to ensure a coordinated approach for effective collection of developer contributions, including consultation on all major planning applications of 10 dwellings or more. The primary method of calculating developer contributions will consider the likely impact of new population. S106 contributions may be required to support construction costs for additional facilities/extension etc or new health facilities that may be co-located with other health or social care providers, as advised by ICB or relevant health provider.

Assessing Supply and Demand

- 6.107 The ICB has a [s106/CIL policy](#) which sets out how the Board will engage with local authorities when planning applications that will impact on local health infrastructure, and, the principles upon which the ICB will exercise its responsibilities for making

¹¹ As identified in accompanying note (Appendix B) but may also include windfall sites where appropriate.

recommendations on the allocation of health related s106 and CIL allocations in a way that is:

- Strategic;
- financially robust;
- meeting need in a particular area;
- supported by the relevant Council, the ICB Members and relevant healthcare organisations in the ICB area; and
- allows the ICB and district/borough councils to align their relevant investment strategies in order to enable the development of a holistic approach to investment in the broad healthcare estate.

6.108 The ICB uses a formula for calculating s106 contributions which is based on the number of additional patients generated by the development multiplied by the standard area (m²) per patient required, multiplied by the project rate (dependent upon the type of project required) using the RICS Building Cost Information Service. Where the application identifies unit sizes the following predicted occupancy rates will be used.

- 1 bed unit @ 1.4 persons
- 2 bed unit @ 2 persons
- 3 bed unit @ 2.8 persons
- 4 bed unit @ 3.5 persons
- 5 bed unit @ 4.8 persons

6.109 Should a planning application not specify the housing unit sizes in the proposed development (for example in an outline planning application), the average occupancy of 2.4 persons¹² will be used in the initial health calculation until such time as the size of the units are confirmed at Reserved Matters Stage, at which point the final costs/health calculation would be confirmed. For example, if the proposal was for a 400 dwelling development the initial calculation would be – 2.4 persons x 400 units x £the agreed rate in relation to the project type (extension, alteration or new build) = £xxx contribution.

6.110 The s106 essentially confirms mutual agreement of the methodology that will be used to calculate the contribution once the details of the scheme are known e.g. new build, extension or internal alterations. It does not specify amounts at outline stage but a formula will be agreed at outline. The calculation will be made upon the lodging of a reserved matters application.

6.111 To establish the number of clinical rooms to determine the core GMS (General Medical Services) space required for a practice patient population the Department of Health uses a space calculation in [Health Building Note HBN11- 01: Facilities for Primary and Community Care Services 2013](#). This sets a standard size of 16m² for a consulting/examination room. [HBN 00-03 Clinical and Clinical Support Spaces](#) provides a standard size for a treatment room of 18m². Other support service spaces are also indicated e.g. utility rooms.

6.112 When major housing development applications are submitted to the authority, the ICB (Strategic Estates Team) will be contacted for their comments, including any required s106 contributions as a result of the proposed development, taking into account current and future needs in the area. These needs and associated costs will form part of the negotiations with local authorities and developments.

¹² ONS 2017

- 6.113 In order to respond to planning applications, the ICB will assess the impact on local practices whose practice boundary includes the proposed development. All GP practices have well established Practice Boundaries as part of their contract and cannot be adjusted without prior ICB approval. Contributions received by the ICB will only be expended on facilities affected by the development.
- 6.114 The ICB will also use local knowledge and intelligence, premises conditions, and numbers of clinical rooms and the ability to accommodate growth to inform the response. One or more general practices may be named as an expected recipient of the funding for alterations or extensions to existing premises and in some cases the ICB may also highlight the requirement for a strategic infrastructure solution.
- 6.115 In response to a planning application consultation, the ICB will clearly identify where extra capacity is required and determine exactly where the finances are to be directed towards a single “identified project”. Such details will be set out within the planning obligation thereby clearly linking the obligation to the specified scheme. Such an “identified scheme” may involve more than one local practice in a settlement where capacity has to be met at more than one location where practice boundaries overlap. This will still be one project but implemented across two sites.
- 6.116 Any s106 contributions required to fund health infrastructure as part of a development will therefore be established on a case-by-case basis with input from the ICB, using the formula indicated below. This is based on the impact the proposal will have on nearby primary care facilities. Further information on the ICB’s approach to s106 contributions can be accessed in their [Section 106 Monies Funding Policy and Procedure](#) paper.

Health infrastructure s106 requirement (schemes comprising 10 or more dwellings)
<p>Number of units x assumed occupancy rate = Number of people</p> <p>Number of people</p> <p style="text-align: center;">x</p> <p>Standard area (m²)/person required</p> <p style="text-align: center;">x</p> <p>Cost for provision of identified project type (using the RICS Building Cost Information Service)</p>

Open Space, Public Realm and Leisure

Justification

- 6.117 The importance of good quality green space or ‘green infrastructure’ to where we live has significantly increased over recent years, and this is reflected in the planning system. The climate crisis, biodiversity crisis and health crisis (including Covid-19) mean we all need multi-functional and good quality green space now more than ever to address the challenges of the physical and natural environment we live in.

- 6.118 Residents of new housing developments will generate additional needs and demands for open space, sport and recreation facilities. It is therefore important such facilities are sufficient, accessible, connected and enhance nature and biodiversity. Also critical to this is water management as well as climate mitigation and adaptation. There should also be activities for all to enjoy such as play, food production, recreation and sport so as to encourage physical activity and support good health, social inclusion and well-being.
- 6.119 Policy DM18: Public Open Space in New Development requires that new residential development will contribute to the provision of high-quality open space for its residents, through provision of public open space on site and, where appropriate, through financial contributions towards improving the quality and/or accessibility of nearby existing spaces. Any on-site provision must include a long-term maintenance and management plan as part of the s106 agreement. Proposals for new development are required to use the information contained within the Open Space Audit to determine the most appropriate means of providing open space for residents.
- 6.120 Provision of open space contributions on site or off site through Section 106 agreements will apply to all major residential developments of 10 or more dwellings, including conversions.
- 6.121 Proposals of 9 or fewer dwellings (on a site less than 0.5 hectares) will not be required to contribute to open space requirements unless they are capable of accommodating 10 or more residential units or form part of a larger developable site for residential units. They will, however, be required to have regard to the need to provide private amenity space, landscaping, biodiversity enhancements and communal areas to enable informal play/social interaction within scheme design, to be secured in perpetuity via a s106 agreement.

Open Space Audit

- 6.122 An Open Space Audit (OSA) was undertaken in July 2021 which provides a robust assessment of needs and deficiencies of open space in order to establish local provision standards and create an up-to-date evidence base which can be used to inform decision making on planning applications. The OSA comprises of a main report and five neighbourhood area profiles which provide further analysis at a localised level.
- 6.123 Policy DM18(2) states that the Council will work with developers to determine the most appropriate means of providing open space by having regard to the most up to date assessment of open space requirements or provision across the borough, as set out in the Council's OSA.
- 6.124 The Council's latest OSA illustrated that need varies across the area, and identified a series of priorities. Specific priorities identified in the audit that the Local Plan will aim to address include:
- Increasing amenity greenspace provision in Blackburn North and Darwen Neighbourhood Areas;
 - Increasing natural and semi-natural greenspace provision in Blackburn North and East Neighbourhood Areas;
 - Improving the quality of existing open spaces, especially children's play areas.
- 6.125 Public open space requirements will therefore be determined by the Council on a case-by-case basis, dependent on the development proposal (including relevant growth site

policy, size, location) and having regard to the audit to identify the most appropriate type of open space provision. For that reason, the policy seeks to avoid being overly prescriptive, as open space requirements and financial contributions will be determined based on identified needs relating to each individual development site.

- 6.126 The OSA also establishes an up to date set of local standards for the amount, quality and accessibility of open space that it expects to be provided within neighbourhood areas and at a Borough-wide level. These standards are based on current provision levels and will be used to inform development proposals, helping to ensure that, where necessary, developers are required to provide sufficient open space in new developments to meet the needs of local residents.
- 6.127 In the first instance, all types of provision should look to be provided as part of new housing developments but where these are already provided by an existing open space within an appropriate catchment distance, the focus should be on ensuring contributions to enhancing the quality and accessibility of existing open space provision. The OSA seeks to prioritise improving the quality of facilities and accessibility to existing green spaces and maximising opportunities to provide additional open spaces wherever possible.
- 6.128 The tables below identify the Average Provision Rates (APR) for each open space typology compared to the Fields in Trust standards and will be used as a guide to determine the amount and type of open space to be provided on-site.

Table 4: Open space standards for new developments – as set out in OSA

Type	Standard (ha per 1,000 people) (Average Provision Rate)	Standard (ha per 1,000 people) (Fields in Trust Standard)	Walking guideline
Allotments	0.09	No standard set	10 minutes' walk (800m)
Amenity greenspace	0.66	0.60	6-minute walk (480m)
Cemeteries	No standard set	No standard set	No catchment set
Civic spaces	No standard set	No standard set	No catchment set
Green and blue corridors	No standard set	No standard set	No catchment set
Natural and semi-natural greenspace	3.03	1.80	10 minutes' walk (800m)
Parks and gardens	1.86	0.80	10 minutes' walk (800m)
Provision for children and young people	0.04	0.25	5-minute walk (500m)

Table 5: Requirement for open space facilities for developments

Type of provision	10-19 dwellings	20-49 dwellings	50-99 dwellings	100-499 dwellings	500+ dwellings
Allotments	Off-site	Off-site	Off-site	Off-site	On-site
Amenity/Natural greenspace	Off-site	On-site	On-site	On-site	On-site
Parks and gardens	Off-site	Off-site	Off-site	Off-site	On-site

Provision for children and young people	Off-site	Off-site	On-site (LAP)	On-site (LEAP)	On-site (NEAP)
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- 6.129 The application of the tables set out above in assessing planning application will be flexible, taking into account of local circumstances. For example, there may be instances where the scheme is of a certain size to warrant the development of formal play space. However, the development site may be proposed in a location where there is already an existing facility within the accepted access standard for the typology of open space. In such circumstances, there is scope to be flexible, and the optimum solution may be one which seeks a financial contribution in-lieu of providing on site provision. This money could then be used to improve the quality of the existing facility. Contributions secured for off-site open space may be spent on any of the typologies listed in Table 4.
- 6.130 The OSA area profiles will provide the evidence in terms of the location and quality of existing green infrastructure provision, and each case will be assessed on its merits.
- 6.131 Management and ongoing maintenance of areas of open space and any on-site play provision will be the responsibility of the developer. Before the commencement of development, the developer will confirm the details of maintenance responsibility with the Council and this will be imposed through a planning condition to ensure that the space is maintained to an acceptable standard in the future, for the long term and in major sites required in perpetuity via a s106 agreement.

Calculating the s106 requirements

- 6.132 Some or all of the open space required can be made through the negotiation of a commuted sum payment to the Council where appropriate, if it cannot be provided on site. Provision of open space contributions through section 106 agreements will apply to all major residential developments of 10 or more dwellings, including conversions either on or off site.
- 6.133 The commuted sum will cover provision of the open space and its maintenance for 25 years to the same standard as that required for on-site provision.
- 6.134 In general terms a commuted sum will be acceptable in the following circumstances:
- In small developments of 10 - 20 dwellings;
 - In developments of 20 or more dwellings where existing open space in close proximity can best provide for the prospective residents of the new development through the implementation of improvement and enhancement works.
- 6.135 In some circumstances, however, contributions secured for off-site delivery of open space will be pooled together to fund more strategic open space sites with a much wider catchment area.
- 6.136 In all cases, contributions towards off site provision/enhancement through commuted sum payments will only be sought where it would be of direct benefit to the occupiers of the new development and where such provision/enhancement would be fairly and reasonably related in scale and kind to the development proposal. The Council's Open Space Audit will form the basis for assessing this.

- 6.137 General amenity greenspace and children's play spaces are seen as essential elements of open space when new residential units are developed. As a result, the commuted sum requirement for residential developments will be based on the current provision rate of these open spaces within the borough. This will form the basis for commuted sum negotiations.
- 6.138 This provision rate is translated into a requirement per person (by dividing the overall standard by 1000) and a requirement per dwelling. For phased or incremental developments, the overall requirements will be based on the number of dwellings expected to be accommodated on the site as a whole.
- 6.139 Updated costs for the provision of amenity greenspace and equipped play areas have been identified by the Council's Environment Team at £71.43 m²¹³ and £190.48 m²¹⁴ respectively.
- 6.140 The current provision rate for amenity greenspace within the borough is 0.66ha/1000 population, equivalent to 6,600m² per 1000 population or 6.6m² per person. For children's play space, the current provision rate is 0.04ha/1000 population, equivalent to 400m² per 1000 population or 0.4m² per person.
- 6.141 For residential developments, the contribution per dwelling will depend on the house type and the estimated occupancy rate for that house type, and the Council's existing standard of open space provision (amenity greenspace and children's play space combined) of 0.7 hectares per 1000 people. Where the unit sizes are not identified then an assumed occupancy of 2.34 persons will be used.

Table 6: Requirement (m2) of open space per unit by size of dwelling

Type of open space	1 bed ¹⁵	2 bed ¹⁶	3 bed ¹⁷	4 bed ¹⁸
Amenity greenspace	13.2	19.8	26.4	33
Children's play area	0.8	1.2	1.6	2

Open space s106 calculation (schemes comprising 10 or more dwellings)				
Type of open space	1 bed	2 bed	3 bed	4 bed
Amenity greenspace	£942.88 (£71.43 x 13.2)	£1,414.31 (£71.43 x 19.8)	£1,885.75 (£71.43 x 26.4)	£2,357.19 (£71.43 x 33)
Children's play area	£152.38 (£190.48 x 0.8)	£228.58 (£190.48 x 1.2)	£304.77 (£190.48 x 1.6)	£380.96 (£190.48 x 2)
Total contribution per dwelling	£1,095	£1,643	£2,191	£2,738

¹³ Based on cost of £35,000 for provision of LAP

¹⁴ Based on cost of £80,000 for provision of LEAP

¹⁵ Based on assumed occupancy rate of 2 persons

¹⁶ Based on assumed occupancy rate of 3 persons

¹⁷ Based on assumed occupancy rate of 4 persons

¹⁸ Based on assumed occupancy rate of 5 persons

Outdoor sports facilities

- 6.142 When considering projects and sites for developer contributions for outdoor sports facilities, regard should be had to the conclusions of the [Playing Pitch and Outdoor Sports Strategy](#) (PPOSS) and [Assessment Report](#). Where possible, contributions should seek to use these conclusions to ensure that development will not negatively impact on the current or future demand for playing pitches in the borough.
- 6.143 The Council will use Sport England’s [Playing Pitch Calculator \(PPC\)](#) as a tool for determining developer contributions linking to sites within the locality. This is only applicable to schemes comprising of 300 or more dwellings. The principal purpose of the calculator is to estimate the demand for playing pitches that may be generated by a new population. The calculator also identifies the current capital cost of meeting this demand, which can then be used for informing the amount of any financial contributions that are secured, but this is not its main purpose.
- 6.144 To determine what supply is provided, it is imperative that the PPOSS findings are considered, and that consultation takes place with Sport England and the sport’s national governing bodies. This is to avoid what is being provided becoming unsustainable and unused, such as single grass pitch football sites without adequate ancillary facilities or new cricket/rugby grounds located away from existing clubs. Instead, multi-pitch and multi-sport sites should be developed, supported by a clubhouse and adequate parking facilities.
- 6.145 The PPOSS will form the basis for negotiation with developers to secure contributions to include provision and/or enhancement of appropriate outdoor sports facilities and subsequent maintenance. S106 contributions could also be used to improve the condition and maintenance regimes of the facilities to increase capacity to accommodate more matches.

<p>Outdoor sports facilities s106 requirement (schemes comprising 300 or more dwellings)</p>
<p>Determined using Sport England’s Playing Pitch Calculator, with input from Sport England</p>
<p>Priority projects to be funded by s106 to be determined using Blackburn with Darwen Playing Pitch & Outdoor Sports Strategy (PPOSS) in consultation with the relevant sport governing bodies</p>

Indoor and Built Sports Facilities

- 6.146 In determining need, the Council will be informed by the [Built Sports Facilities Strategy](#) (BSFS). Sports specific recommendations are made in relation to sports halls, including for sports such as tennis, indoor bowling, squash, gymnastics, trampoline, health and fitness, indoor climbing walls and boxing and martial arts.

- 6.147 The Council will use the [Sport England Sports Facilities Calculator \(SFC\)](#) to calculate the contribution required from each housing development, for schemes comprising 300 or more dwellings. This will be the basis for negotiations with developers on the contribution from each development. The Council will use the calculator to estimate the demand for indoor sports facilities that may be generated by an additional population as well as calculating the contribution. This would be the principal purpose of the calculator, to estimate the demand for indoor sports facilities that may be generated by a new population. But the calculator also identifies the current capital cost of meeting this demand, which can then be used for informing the amount of any financial contributions that are secured, but this is not its main purpose.
- 6.148 The BSFS will form the basis for negotiation with developers to secure contributions to include provision and/or enhancement of appropriate indoor and built sports facilities and subsequent maintenance. S106 contributions could also be used to improve the condition and maintenance regimes of the facilities to increase capacity to accommodate increased usage.

Indoor and built sports facilities s106 requirement (schemes comprising 300 or more dwellings)
Determined using Sport England’s Sports Facilities Calculator, with input from Sport England
Priority projects to be determined using Blackburn with Darwen Built Sports Facilities Strategy in consultation with the relevant sport governing bodies

Biodiversity net gain (BNG) and environmental improvements

Justification

- 6.149 Biodiversity net gain (BNG) seeks to ensure most new development contributes to the recovery of nature, so that habitat for wildlife is in a better state post-development than it was pre-development. In accordance with transitional measures, BNG will apply to planning applications submitted for major developments, from 12 February 2024, and to minor developments from 2 April 2024. Some developments are exempt from BNG. These include householder developments, small-scale self-build and custom-build housing, permitted development, and proposals where the existing on-site habitat (to be impacted by the development) is ‘de-minimis’ (defined as below 25sqm of area habitat or 5 metres of linear habitat, for example watercourses, trees, hedgerows). Whilst the Council’s Local Plan sets its own requirement for 10% net gain, these national, legal requirements take precedence.
- 6.150 As set out in the Government’s BNG Planning Practice Guidance (PPG), developers must follow the mitigation hierarchy and try to avoid, mitigate, and compensate for impacts on the existing biodiversity and habitats on a proposed development site. Any habitats lost through new development must be replaced or compensated for, on a like for like basis, and then a further 10% uplift in biodiversity must be provided. Habitats must be provided at the same condition (quality), or higher, as the habitats that are to be lost. Habitats can be retained, enhanced or created.

- 6.151 Ideally, habitats should be created or enhanced on the same site as the development (on-site). Where BNG is not wholly or partly achievable on-site then the delivery of BNG off-the development site (off-site) must be considered. Off-site land may be sourced from other land in the developer's ownership, land in private ownership (in agreement with the landowner) or from land brokers/habitat banks. The Council may provide their own opportunities for off-site habitat creation or enhancement through the sale of biodiversity units, on council-owned land, to developers.
- 6.152 Planning applications for BNG liable developments will be required to submit a range of information at the application stage, including Biodiversity metrics. All BNG liable developments will be required, by condition, to submit a Biodiversity Gain Plan (BGP) prior to commencement of the development, which the Council must approve (discharging the condition) before works can begin. The BGP must confirm whether BNG will be delivered on-site and/or off-site. Detailed guidance on BNG and the Council's planning process, can be found in the [BNG Planning Advisory Note](#).

Approach to securing biodiversity net gain off-site

- 6.153 Off-site BNG can be delivered by securing a bespoke site(s) for net gain, or from appropriate sites on the local net gain habitat market from other landowners. All off-site habitats must be registered on a national register, managed by Natural England, which are then linked to a specific development(s). A legal agreement (planning obligation) will be required to register an off-site habitat site. As per national requirements, biodiversity net gain must be subject to long term management (a minimum of 30 years) and ongoing monitoring. BNG delivery, management, maintenance and monitoring requirements must be secured through planning conditions, and/or legal agreements, including s106 Agreements or Conservation Covenants. Each habitat needs to be registered before the BNG Plan for the site can be discharged (as the Council needs to know the site is registered to know the BNG can be delivered).
- 6.154 The Council has identified a series of public sites that may provide the opportunity to support BNG delivery within the borough. At the time of preparing this SPD, the Council are awaiting the completion of ecological surveys on each of the identified sites to understand the baseline BNG, the potential uplift and the detailed intervention measures required to deliver BNG uplift. The difference between the baseline and the uplift identifies the number of biodiversity units required to achieve that uplift, and these units can then be sold. The survey will also calculate the cost of selling each of those units. The sale of the biodiversity units will be used to undertake habitat improvements and to manage the site for a minimum 30-year period. Further details on any available sites will be available from the Council in due course.

Statutory credits

- 6.155 If a developer cannot use on-site or off-site land, they must buy statutory credits from the government. The use of statutory credits is intended to be a last resort option for developers and the credit prices have intentionally been set at a high rate, which is not market competitive, to dissuade their use and encourage BNG to be delivered local to the source development. The Council would only expect national credits to be used in very rare and exceptional circumstances, with strong evidence provided to justify their use. Indicative statutory biodiversity credit prices are set out at [Statutory biodiversity credit prices - GOV.UK \(www.gov.uk\)](#).

S106 agreements for biodiversity net gain

- 6.156 A s106 agreement will be required to secure i) significant on-site gains; and/or ii) any off-site gains and/or monetary payments relating to the purchase of off-site biodiversity units and ongoing maintenance costs; and iii) the cost for monitoring the delivery of the BNG (whether on-site or off-site) for a 30-year period. The s106 will need to include a range of information including the habitat types to be delivered, and the requirements in respect of the management and monitoring of the site.
- 6.157 Where the Council provide biodiversity units for sale, contribution costs will be calculated based on the total biodiversity unit value for the amount of habitat to be created or enhanced, and the cost of maintaining and monitoring that habitat for the mandatory 30-year period. These costs will be on a site-by-site and habitat-by-habitat basis.
- 6.158 Alongside guidance within the BNG PPG, the Government have published information on [‘Legal agreements to secure your biodiversity net gain’](#), with further information set out in the [BNG Planning Advisory Note](#).

Calculating S106 monitoring fees

- 6.159 The Community Infrastructure Levy (CIL) Regulations 2010 (as amended) enable the Council to charge fees associated with the monitoring and reporting of planning obligations charged through section 106 agreements providing that they are fairly and reasonably related in scale and kind to the development and do not exceed the authority’s estimate of its cost of monitoring the development over the lifetime of the planning obligations which relate to that development (Regulation 122(2A)).
- 6.160 The BNG PPG confirms that Councils should secure funding for delivering or monitoring biodiversity net gain through s106 planning obligations where justified. The Environment Act (2021) requires that all significant on-site and all off-site BNG must commit to a minimum 30-year ecological management of the site to ensure that enhanced or created habitats are secured in the long-term. The monitoring of the habitats is the responsibility of the developer, and regular monitoring reports must be completed and submitted to the Council (or, where relevant, a responsible body). The Council must monitor the receipt of the reports and independently assess that BNG is being delivered in accordance with the Biodiversity Gain Plan and Habitat Management and Monitoring Plans. Monitoring fees will therefore be sought in appropriate cases – namely, for monitoring the delivery and management of significant on-site habitat enhancements and off-site habitats.
- 6.161 To support the transparency of this process, the Council anticipate introducing a BNG monitoring fee calculator, which will calculate costs based on informed estimates of:
- officer time/costs, and associated overhead costs, to monitor the habitats (officers may include ecologists, planners, monitoring, and administration staff). These costs will be assessed on a site-by-site basis, likely dependent on the habitat/site complexity (e.g. the size, number and significance of different habitats that need to be monitored and assessed);
 - additional associated costs related to monitoring and reporting, including costs for monitoring software, site visits etc. These costs will be spread across all sites.

- the number of reporting intervals as this will inform how regularly sites need to be monitored and checked;
- an inflation rate (based on the CPIH) to cover the costs of monitoring over a 30-year period. This rate will be calculated based on analysis of historic inflation rates and the latest available forecasts (such as that published by the Office of Budget Responsibility) and will be regularly reviewed. Payment of the monitoring fee will typically be due on or before commencement of the development, but the calculated monitoring fee will need to anticipate for cost inflation over the 30-year monitoring period.

6.162 BNG remains in its relative infancy, and guidance and requirements will evolve as the working practicalities of BNG are better understood. The Council reserve the right to adjust the assumptions used within the calculator.

Biodiversity net gain s106 requirement
Cost of Biodiversity Units (including 30-year management)
and
Monitoring Fees

7 Deeds of Variation

- 7.1 Planning contributions made under Section 106 of the Town and Country Planning Act 1990 may be modified or discharged at any time by a deed between the LPA and all parties to the agreement; or where an application is made to modify or discharge a planning contribution made under the Act, the LPA may decide to either:
- (a) Continue the planning contribution without modification;
 - (b) Discharge it, if it no longer serves a useful purpose; or
 - (c) If it continues to serve a useful purpose, but would serve that purpose equally well if it had effect subject to the modifications applied for, then allow the modifications, provided it does not place any burden on a third party.
- 7.2 Where the LPA decides not to allow a modification or change, and the agreement has been in existence for 5 years or more the applicant may appeal the determination to the Secretary of State, pursuant to s106B. There is also a special procedure for varying affordable housing requirements under Section 106 BA of the act. If a deed of variation is requested, a planning officer will need to authorise the variation, determining whether or not the change is justified. In certain cases, the variation may need to be authorised by the Planning & Highways Committee. A planning officer will then instruct the Council's legal services team to draft the variation. Once the deed of variation is agreed it will be signed by all relevant parties. Applicants will be expected to cover all legal costs.

8 Spending, monitoring and review

- 8.1 The Council regularly monitors the delivery of financial and non-financial s106 obligations to ensure that these are secured in accordance with the relevant planning legal agreement. An [Infrastructure Funding Statement \(IFS\)](#) is prepared annually which reports on the s106 contributions the Council has received and spent in the monitoring period (1st April – 31st March each year), in addition to s278 works undertaken within the same period.
- 8.2 The Community Infrastructure Levy (Amendment)(England)(No.2) Regulations 2019 allow Local Authorities to charge a monitoring fee through s106 planning obligations, to cover the cost of the monitoring and reporting on delivery of that s106 obligation. Monitoring fees can be used to monitor and report on any type of planning obligation, for the lifetime of that obligation. However, monitoring fees should not be sought retrospectively for historic agreements.
- 8.3 The regulations allow monitoring fees to be either a fixed percentage of the total value of the section 106 agreement or individual obligation; or could be a fixed monetary amount per agreement obligation; or authorities may decide to set fees using other methods. However, in all cases, monitoring fees must be proportionate and reasonable and reflect the actual cost of monitoring.
- 8.4 The following monitoring fees will be added to any s106 agreements associated with planning applications. The fees set out below are considered to be proportionate and will contribute to the Council's reasonable costs of monitoring each obligation. Monitoring fees will be reviewed regularly to reflect up-to-date costs. To clarify, the fee will be added to the s106 requirements.

Table 7: S106 Monitoring fees

Type of obligation	Monitoring fee	Comment
Commuted sum	1% of each payment instalment (excluding separate BNG monitoring fee set out below)	To be included within each invoice sent to developers requesting payment at appropriate time.
Land contribution	£1,000 per development site	Payment to be made at the time land transfer takes place.
On-site affordable housing	£1,000 per development site	Payment to be made on first occupation of affordable units.
BNG monitoring	Calculated using BNG monitoring calculator	To cover monitoring costs over the 30-year period – please note this is separate to 1% commuted sum monitoring fee

Appendix A – Affordable Housing Eligibility Criteria



Affordable Housing Eligibility Questionnaire

ALL applicants must sign the legal declaration at the end of this form

MANDATORY CRITERIA

To buy a First Home, you must answer yes to all three of these questions:

Q1: First Time Buyer requirement

All proposed First Homes Purchasers, the New First Homes Owner(s) must be first time buyers

YES: a first-time buyer:

NOT a first-time buyer: you are not eligible and cannot apply

Q2: Household income limit

The household income of **all** proposed First Homes Purchasers, the New First Homes Owner(s), must not exceed £80,000 per annum

YES: requirement met and detailed below. All applicants must complete this section

NO: household income cap exceeded; you are not eligible and cannot apply

Homebuyer 1		Evidenced by
Name:		
Employment income (gross)	£	[Pay slip/bank statement etc]
Self-employment income (gross)	£	[Signed off accounts]
Other income	£	
Total 1	£	

Homebuyer 2		Evidenced by
Name:		
Employment income (gross)	£	[Pay slip/bank statement etc]
Self-employment income (gross)	£	[Signed off accounts]
Other income	£	
Total 2	£	

Total household income 1& 2	£
--	---

Q3: Mortgage / Home purchase plan requirement

Proposed First Homes Purchasers, the New First Homes Owner(s), must have a mortgage or home purchase plan (if required to comply with Islamic law) to fund a minimum of 50% of the discounted purchase price.

Please provide evidence (e.g. offer in principle) from your mortgage provider that you are able to fund a minimum of 50% of the discounted purchase price.

[include supporting evidence]

FURTHER CRITERIA

Please note: if a suitable buyer has not reserved a home after 3 months, the eligibility criteria will revert to the national criteria set out above, to widen the consumer base.

To buy a First Home, you need to answer yes to one of these questions:

Q4: Local connection requirement

Are proposed First Homes owner(s) buying because of meeting the local connection eligibility criteria? This requires the applicant to have lived within Blackburn with Darwen for 36 consecutive months.

For joint purchasers only one applicant must meet these requirements

YES: please complete Local Connection section below

NO: please leave section blank

Homebuyer 1 (only one homebuyer must meet this requirement)

Name:	
Address:	
Time at current address:	
If less than 3 years, please give previous address:	

Homebuyer 2 (only one homebuyer must meet this requirement)

Name:	
Address:	
Time at current address:	
If less than 3 years, please give previous address:	

Q5: Keyworker/essential worker requirement

Are proposed First Homes owner(s) buying because of meeting the keyworker/essential worker eligibility criteria? This requires the applicant to have a requirement to live within Blackburn with Darwen due to their employment as a keyworker/essential worker (meaning a person employed or with a confirmed job offer in health and social care; or education and child care; or public safety and national security).

For joint purchasers only one applicant must meet these requirements

YES: please complete Keyworker/essential worker section below

NO: please leave section blank

Homebuyer 1 (only one homebuyer must meet this requirement)

Name:	
I am a key worker/essential worker	

Employer:	
Employer address:	
Job title/role	
Evidenced by:	[ID/warrant card]

Homebuyer 2 (only one homebuyer must meet this requirement)	
Name:	
I am a key worker/essential worker	
Employer:	
Employer address:	
Job title/role	
Evidenced by:	[ID/warrant card]

<u>Q6: Armed Forces requirement</u>	
<p>Are proposed First Homes owner(s) buying because of meeting the Armed Forces eligibility criteria? To meet this criteria at least one applicant must meet one of these conditions:</p> <p>In recognition of the unique nature of their circumstances, members of the Armed Forces, the divorced or separated spouse or civil partner of a member of the Armed Forces, the spouse or civil partner of a deceased member of the Armed Forces (if their death was caused wholly or partly by their service) or veterans within five years of leaving the Armed Forces should be exempt from any local connection testing restrictions.</p>	
<p><u>YES:</u> please complete the Armed Forces section below (for joint purchasers only one applicant must meet these requirements)</p>	
<p><u>NO:</u> please leave section blank</p>	

Homebuyer 1 (only one homebuyer must meet this requirement)

Name:	
I am a member of the Armed Forces, the divorced or separated spouse or civil partner of a member of the Armed Forces, the spouse or civil partner of a deceased member of the Armed Forces (if their death was caused wholly or partly by their service) or a veteran within five years of leaving the Armed Forces	
Armed Forces unit	Name: Address:
Job title/role	
Evidenced by:	[ID/warrant card]

Homebuyer 2 (only one homebuyer must meet this requirement)

Name:	
I am a member of the Armed Forces, the divorced or separated spouse or civil partner of a member of the Armed Forces, the spouse or civil partner of a deceased member of the Armed Forces (if their death was caused wholly or partly by their service) or a veteran within five years of leaving the Armed Forces	
Armed Forces unit	Name: Address:
Job title/role	
Evidenced by:	[ID/warrant card]

Declaration

I confirm that the information provided on this form is true and accurate and that it will be used by [DEVELOPER] and Blackburn with Darwen Borough Council in assessing suitability for an affordable unit on the [NAME OF HOUSING DEVELOPMENT].

Signed: _____

(Homebuyer 1)

Date: _____

Signed: _____

(Homebuyer 2 if applicable)

Date: _____

N.B. – The information provided on this form will be used as the applicants' income criteria and will be validated. The Council is empowered to seek further assurances or request further information in order to satisfy itself that a proposed qualifying person meets the criteria as set out in the section 106 agreement.

Please return Completed Forms to:

**Strategic Development Manager (Housing)
5th Floor, 10 Duke Street
Blackburn
BB2 1DH**

Or

**Strategic Planning
5th Floor, 10 Duke Street
Blackburn
BB2 1DH**

Appendix B – Approach to Transport Infrastructure Contribution Calculations in South-East Blackburn

Introduction

The following note provides details of the approach used to calculate developer contributions towards the Transport Infrastructure required to support growth across Southeast Blackburn. The package of measures includes a significant upgrade to M65 Junction 5, the delivery of an Active Travel Network comprising around 18km walking and cycling improvements across Southeast Blackburn and other measures to support access and accessibility in relation to the delivery of a Strategic Employment Site to the south of the M65 close to Junction 5.

As outlined in the Blackburn with Darwen Borough Council Exec Board Report (Dec, 2023). The total capital costs associated with delivery of the M65 Junction 5 improvement scheme and the Southeast Blackburn Active Travel Network are £31m. Blackburn with Darwen Borough Council submitted a successful Levelling Up Fund bid which will provide £20m towards these delivery costs. The £11m outstanding costs will need to come from alternative funding sources including developer contributions. The additional cost of specific measures to provide access to and improve the accessibility of the Strategic Employment Site (totalling £3m, as set out in Table 1 below) also require alternative sources of funding.

This note provides the basis for calculating, and justification of, developer contributions towards the funding shortfall and delivery of specific transport measures relating to the Strategic Employment Site and other Local Plan site allocations in Southeast Blackburn.

Sites

The development sites identified from the New Local Plan 2021-2037 that will have a direct impact on the need for the identified transport infrastructure include:

Site Ref	Site Name
E145	Issa Way North
E167	Evolution Park (Medipark), Shadsworth Road
H039	Haslingden Rd (Fishmoor Reservoir) Site - 16/7
MU008	Issa Way South (Mixed Use) - 16/8
H029	Fishmoor Drive (Site 4)
E179	Strategic Employment Site - Site 1 (accessed off Haslingden Road)
E179	Strategic Employment Site - Site 2 (Safeguarded Land)
E179	Strategic Employment Site - Site 3 (access off School Lane)

Site H039 has already been granted planning permission and has contributed towards other transport infrastructure delivered in Southeast Blackburn and as such has been discounted from the tables set out below. For MU008, an assumption of residential land use has been applied for the purposes of assumed trip generation rates (and therefore proportionate contribution) based on this generating the least amount of trips over mixed use or employment. However, if a mixed use or employment site proposal were to come forward then additional contributions could be requested subjected to a re-calculation based on updated trip generation for the site.

As set out in Core Policy 12 (Infrastructure and Delivery) of the Local Plan, in the Key Development Considerations for site specific policies, and in Development Management Policy 38 (Major Infrastructure Schemes) it is expected that all of the development sites identified above will provide contributions towards the transport infrastructure identified as being required to support growth across Southeast Blackburn. These infrastructure requirements are clearly set out in the Council's Infrastructure Delivery Plan (IDP). The Council will seek to use alternative sources of funding where necessary (including capital, grants, and planning contributions from any windfall sites where appropriate).

Transport Infrastructure

The Transport Infrastructure which has been identified as being required to support growth across Southeast Blackburn, and included in the Council's IDP includes:

1. M65 Junction 5 Improvement Scheme - £25m
2. SE Blackburn Active Travel Network - £6m
3. M65 Junction 5 Footbridge & Sustainable Transport Package - £2m
4. Strategic Employment Site Access Works - £1m

Blackburn with Darwen Borough Council were successful in applying for £20m of Levelling Up Funding towards the M65 Junction 5 Improvement Scheme (1) and the Southeast Blackburn Active Travel Network (2).

The M65 Junction 5 footbridge improvements and other sustainable transport improvements (3) also relate specifically to the accessibility improvements required for the Strategic Employment Sites 1 & 2 (set out in the Council's Local Plan evidence base reports and IDP). The M65 Junction 5 footbridge improvements are subject to further feasibility work but may include deck widening and increasing the height of the parapets. This would be to accommodate increased numbers of pedestrians and cyclists and to strive to meet current design standards.

Developer Contribution

The contribution required from each development towards the M65 Junction 5 improvement scheme (1) is based on the proportionate impact from the traffic generated by each development on the M65 Junction 5 using the combined inflow in passenger car units (PCUs) for the AM and PM peak hours.

The contribution required towards the Southeast Blackburn Active Travel Network (2) is based on the proportionate impact from the traffic generated by each development on the A6077 Haslingden Road / Blackamoor Road junction using the combined inflow in PCUs for the AM and PM peak hours. This is due to the modal shift mitigation strategy identified for this junction through the Local Plan Transport Study.

The contributions required towards site access works (4), the M65 Junction 5 footbridge improvements and other sustainable access improvements (3) to the site has been calculated based on the site area split between SES Site 1 and 2. However, as shown in Table 3 below, due to the upfront s278 costs that will be funded by Site 1, an amendment has been made to the payment profile for Sites 1 and 2 to take this into account. Site 2 will therefore not be expected to contribute towards these works and, instead, contributions will only be required to contribute towards the M65 Junction 5 Improvement Scheme (1) and South-East Blackburn Active Travel Network schemes (2). This approach is explained in more detail in the section below.

Scheme Cost Estimates

The latest available cost estimates including current funding commitments are as shown in Table 1 below:

Table 1 – Southeast Blackburn Transport Package Funding Requirements

	Total Cost	LUF	Shortfall
1 M65 Junction 5 Improvement Scheme	£25,000,000	£16,000,000	£9,000,000
2 SE Blackburn Active Travel Network M65 Junction 5 Footbridge & Other Sustainable SES Sustainable Transport	£6,000,000	£4,000,000	£2,000,000
3 Package	£2,000,000	£0	£2,000,000
4 SES Site Access Works (s278)	£1,000,000	£0	£1,000,000
	£34,000,000	£20,000,000	£14,000,000

Site Allocations

Having applied the proportionate distributions for each transport infrastructure improvement as described above (using trip generation rates) the contributions have been identified as being required from each of the allocated development sites as shown in Table 2 below:

Table 2 – Contributions by Development Site

Site	1	2	3	4	TOTAL
Issa Way North	£926,634	£395,684	£0	£0	£1,322,318
Evolution Park (Medipark)	£670,574	£207,178	£0	£0	£877,752
Issa Way South (Mixed Use)	£312,620	£133,493	£0	£0	£446,113
Fishmoor Drive (Site 4)	£262,651	£67,623	£0	£0	£330,274
SES - Site 1	£3,306,686	£537,695	£1,078,320	£539,160	£5,461,861
SES - Site 2	£3,170,642	£515,573	£921,680	£460,840	£5,068,734
SES - Site 3	£350,193	£142,756	£0	£0	£492,949
	£9,000,000	£2,000,000	£2,000,000	£1,000,000	£14,000,000

An amendment has been made to the contribution split between the SES Site 1 and Site 2 to account for s278 works to be funded by the Site 1 developer to provide access to the site, which can support development across both sites.

Site 2 contributions towards M65 Junction 5 footbridge and other sustainable transport works (3) and site access works (4) have been reallocated to the M65 Junction 5 Improvement Scheme (1) and South-East Blackburn Active Travel Network works (2) (given the upfront s278 requirement for Site 1) and will be made as retrospective requests. Therefore, taking account of the upfront works required the contributions have been amended as shown in Table 3 below.

Table 3 – Contributions by Development Site – Adjusted for Upfront Costs

	1	2	3	4	TOTAL
Issa Way North	£926,634	£395,684	£0	£0	£1,322,318
Evolution Park (Medipark)	£670,574	£207,178	£0	£0	£877,752
Issa Way South	£312,620	£133,493	£0	£0	£446,113
Fishmoor Drive (Site 4)	£262,651	£67,623	£0	£0	£330,274
SES - Site 1	£2,200,000	£261,861	£2,000,000	£1,000,000	£5,461,861
SES - Site 2	£4,277,328	£791,406	£0	£0	£5,068,734
SES - Site 3	£350,193	£142,756	£0	£0	£492,949
	£9,000,000	£2,000,000	£2,000,000	£1,000,000	£14,000,000