

# Planning Obligations

## Financial Contribution Form 2023/24



**This form should only be used for Habitats Regulations and Affordable Housing financial contributions. Please complete the greyed out boxes using Fill and Sign.**

This form needs to be completed for all planning applications which result in a net increase in homes and where a Section 106 Agreement (S106) will need to be entered into to secure financial contributions.

**This form needs to be completed so that the planning application can be registered.** If you don't think there is a requirement to make these contributions, a letter of explanation should be supplied. **Incomplete forms and failure to supply a copy of the legal title to the property and other documents indicated below will result in your application being deemed invalid and returned.** At this stage you are not being asked to agree the details of the S106 agreement only to supply information that is required to facilitate the S106 process so that your application can be determined within statutory targets. Please complete and attach the S106 proforma (either Fastrack or Bilateral) which can be downloaded from the [website](#).

In view of the financial implications contained in the Section 106 Agreement it is advisable to obtain **independent professional advice** from either your solicitor or planning consultant. Applicants should ensure at an early stage in the proceedings that all interested parties know that they will need to sign the S106 when it has been prepared, including lessees and mortgagees. Applicants are also advised to consider using the Council's [pre-application advice service](#) to establish the level of contribution required prior to submitting a formal planning application. There is a charge for this service.

This form is split into 3 parts:

- Part 1: Habitats Regulations Contributions
- Part 2: Affordable Housing Contributions
- Part 3: Legal Agreement

### Part 1: Habitats Regulations Contributions

Heathlands Strategic Access Management and Monitoring (SAMMs) contributions will be required for planning applications across BCP Council area.

In the Poole area, Poole Harbour SAMMs will also be required. If the proposed development is not going to pay Community Infrastructure Levy, then contributions towards Nutrient Reduction in Poole Harbour will also be required.

The following rates apply for 2023/24:

Area	Contribution	Applicable to	Rate per house	Rate per flat	Admin fee
BCP	Heathlands SAMMs	All applications with a net increase in homes	£485	£331	5% (min.£75)
Poole only	Poole Harbour Recreation SAMMs	All applications with a net increase in homes	£172	£118	5% (min.£25)
Poole only	Nutrient Reduction in Poole Harbour	Only required if CIL will not be paid	£1,705	£1,164	None

To calculate the required contribution, we consider any existing credit for an existing dwelling. Homes demolished prior to submission of the application cannot be counted as a credit. For example, an application to replace 1 house with 4 flats, the calculation is 4 x flat rate minus the rate for one house.

**Please complete:**

Application Location	10 Station Road, Parkstone, Poole, BH14 8UB		
Name	Juna Investments Ltd		
Email address			
Phone number			

In the table below enter the number of proposed and existing homes/flats into the grey boxes. The total financial contribution is calculated as *Total Proposed (£) – Total Existing (£)*. Please calculate the 5% admin fee. If the calculated admin fee is below £75 for Heathlands and £25 for Poole Harbour you must apply the minimum amount as set out. For proposals that involve care homes or for HMOs for additional rooms above 6, each room is considered as a flat.

**Heathland SAMMs (all BCP Council area)**

	Number	Rate	Total
Proposed houses		x £485 =	£
Proposed flats	2	x £331 =	£
Total Proposed			<b>£662</b>
Existing houses		x £485 =	£
Existing flats		x £331 =	£
Total Existing			<b>£</b>
<b>Total (Total Proposed – Total Existing)</b>			<b>£662</b>
Admin fee	5% of Total Or minimum of £75		£737

**In the Poole area only:**

**Poole Harbour Recreation SAMMs (all applications)**

	Number	Rate	Total
Proposed houses		x £172	£
Proposed flats	2	x £118	£236
Total Proposed			<b>£</b>
Existing houses		x £172	£
Existing flats		x £118	£
Total Existing			<b>£</b>
<b>Total (Total Proposed–Total Existing)</b>			<b>£236</b>
Admin fee	5% of Total Or minimum of £25		£261

**Nutrient Reduction in Poole Harbour (only for applications not paying CIL)**

	Number	Rate	Total
Proposed houses		X £1,705	£
Proposed flats	2	x £1,164	£2328
Total Proposed			<b>£</b>
Existing houses		x £1,705	£
Existing flats		x £1,164	£
Total Existing			<b>£</b>
<b>Total (Total Proposed–Total Existing)</b>			<b>£2328</b>
Admin fee	5% of Total Or minimum of £75		£2444.40

## Part 2: Affordable Housing Financial Contributions

Where affordable housing would not be provided on site a financial contribution towards provision of affordable housing elsewhere in the local authority area will usually be required. The legacy local authority areas currently have different affordable housing policies. Please refer to the website page for the area that your proposal is located:

### For housing proposals in the Bournemouth area

In the Bournemouth area where **10 or more** new or additional units of residential accommodation will be created **or where 9 or less units are proposed and the site area is 0.5 hectares or more.**

Policy AH1 of the '[Affordable Housing Development Plan Document](#)' sets out the current affordable housing policy in the Bournemouth area.

The '[Affordable Housing Supplementary Document](#)' provides further guidance on how Policy AH1 will be applied in the Bournemouth area.

For the Bournemouth area we have prepared indicative financial contributions for affordable housing provision where it is not possible to provide affordable dwellings on site. The contribution varies by area and dwelling type. You can view the [Sub Market Area District Map](#) and the contributions table for each sub area:

- [Outer North West district](#)
- [Northern district](#)
- [Wessex Way Corridor](#)
- [West Coast district](#)
- [Poole Fringe](#)
- [East Coast district](#)

These tables are supported by a [technical note](#). We also provide a [guidance note](#) on applying the vacant building credit and 10 unit threshold to affordable housing policy.

### For housing proposals in the Christchurch area

In the Christchurch area where **10 or more** new or additional units of residential accommodation will be created **or where 9 or less units are proposed and the site area is 0.5 hectares or more.**

Policies LN3 & LN4 of the [Christchurch & East Dorset Local Plan](#) set out the current affordable housing policy in the Christchurch area. Further information on affordable housing in the Christchurch area can be found in the '[Housing and Affordable Housing Supplementary Planning Document](#)'

### For housing proposals in the Poole area

In the Poole area where **11 or more** new or additional units of residential accommodation will be created **or over 1,000 sqm in floorspace.**

Policy PP11 in the [Poole Local Plan](#) sets out the current affordable housing policy in the Poole area. Further information on affordable housing in the Poole area can be found in the [Affordable Housing Supplementary Planning Document](#).

Note: Unlike in the Bournemouth area there are no indicative contributions tables for affordable housing in Christchurch or Poole areas.

### Challenging viability

If the applicant considers the cost of providing the required level of affordable housing unviable then they should submit viability data to support their case. The viability information submitted will be assessed by the District Valuer. Further information including the viability data and assessment fees are set out in the [Planning Advice Note-Validation Requirements](#). It is a validation requirement that the fee for the District Valuer to assess viability data to establish whether an affordable housing contribution will be viable is paid to the Council when the application is submitted.

Fixed Fees for the initial desk-based assessment of the Applicant's viability report are as follows and must be paid before your application is made valid. It would therefore be helpful if the proformas and land registry documents are submitted to us with the application.

Scheme Size (Nos. units)	Scheme Fee
Over 1,000 sq m but < 11 units	£2,500
11 - 20	£2,500
21 - 30	£3,000
31 - 40	£3,500
41 - 50	£4,000
51 +	Individual quotations

Please note that where a Section 106 Agreement is entered into a Legal Services affordable housing administrative fee of £200 will be included in addition to the affordable housing contribution. This is separate to the viability assessment fee and is not payable at this stage. This fee should be included as a cost in any viability data that you choose to submit.

Please choose either option A or B listed below (please use 'fill and sign' to mark with a tick or cross):

<input type="checkbox"/>	<b>Option A</b>
<input type="checkbox"/>	I agree to the affordable housing provision set out in the policy
<input type="checkbox"/>	<b>Option B</b>
<input type="checkbox"/>	I do not agree to the affordable housing provision set out in the policy. Therefore as justification:
<input type="checkbox"/>	I am submitting viability data using the following Toolkit (please provide the name and provider of the Toolkit used):  _____
	Or
<input type="checkbox"/>	I am submitting a Viability Assessment Report.
<input type="checkbox"/>	I enclose the relevant initial District Valuer fee for the viability assessment.

An affordable housing contribution is not required as the application seeks consent for 2 flats only which is below the threshold.

### Part 3: Section 106 Legal Agreement

Please ensure that you read 1-5 below, tick the relevant boxes, enclose the fully completed pro forma and documents requested below with this form (please use 'fill and sign' to mark with a tick or cross):

<input checked="" type="checkbox"/>	1. I/We agree to enter into a Section 106 planning obligation
<input type="checkbox"/>	2. I/we would like to take advantage of the <b>Council's Fast Track Unilateral Undertaking</b> . A draft undertaking is enclosed. I/we agree to deposit the required contributions with the Council upon request.
<input type="checkbox"/>	3. I/We enclose a fully completed Section 106 pro forma including land ownership details and 1 copy of a plan (no larger than A4 or A3) with the site outlined in red (this can be a copy of the location plan submitted with your application and is required in addition to the Land Registry Title Plan)
<input type="checkbox"/>	4. I/we enclose an up-to-date Land Registry <b>Official Copy of the Register of Title to the Land and Title Plan</b> . This <b>MUST</b> be dated within the last <b>3 months</b> . (The result of a Land Registry Search of the Index Map (SIM) may also be required if the site includes complex titles or additional land. This will be requested in consultation with Legal Services.) You may be asked to provide updated copies prior to the finalisation of the planning obligation.
<input checked="" type="checkbox"/>	5. I/We agree to pay the Council's reasonable legal fees in respect of the checking or preparation and completion of the Section 106 planning obligation. I/We understand that the Section 106 will not be completed/accepted and Planning Permission granted until the legal costs are paid.

Completed forms should be submitted with the planning application.

If you have selected the **Council's Fast Track Unilateral Undertaking** you will need to complete and submit the [Fast Track Unilateral Undertaking Template](#) alongside this document.

You **do not** need to make the payment of the Planning Contributions (Habitats Regulations and/ or Affordable Housing), legal fee or admin fees until we request them. Please **do not** send payment with the planning application.

However, if you are challenging the Affordable Housing contribution **you must** send us the fee for the District Valuer alongside the submission of the planning application. The fees are set out above. Your application will not be validated until the District Valuer fee has been paid.

If you have indicated you wish to use the **Council's Fast Track Unilateral Undertaking** process and we are considering approving the application, our Legal Team will contact you and arrange payment of the legal fee, the contributions and the admin fees. We accept payment by BAC transfer with details provided in an email sent by the Legal Team. Financial contributions payable under the Fast Track Unilateral Undertaking process are capped at £25,000. Financial contributions exceeding the £25,000 will need to be secured via a Bi-Lateral Section 106 Agreement.

For further information, please email the BCP Council planning obligations team, check the Developer Contributions page on our [website](#) or contact the Customer Contact Centre on 01202 123321.