ALLOCATIONS PLAN

Broadwindsor Group Parish CLT Ltd

1. Background

1.1 Broadwindsor Group Parish CLT Ltd is a community benefit society registered number 7331 whose registered address is 6 Yarn Barton, Broadwindsor, Dorset DT8 3QW hereinafter referred to as the “Trust”.

1.2 The Trust has entered into a long-term lease with the Registered Provider Abri Group Limited (formerly Yarlington Housing Group) (Company Registration number:8537) Collins House, Bishopstoke Road, Eastleigh, SO50 6AD; hereinafter referred to as the “Landlord”.

1.3 This Allocations Plan has been prepared to ensure that the objects of the Trust are met and relates to the development of fifteen affordable dwellings on land known as Netherhay Lane, Drimpton, Dorset.

2. Section 106 Agreement (Town & Country Planning Act 1990)

2.1 Every effort has been made to ensure the Allocation Plan is not at variance with other policies and agreements but in the event that this Allocations Plan is found to be at variance with the Section 106 Agreement dated 19 March 2021 ("the Section 106 Agreement") then the Section 106 Agreement shall take precedence and this Allocations Plan shall be amended accordingly.

2.2 The purpose of the Section 106 Agreement is to ensure that the dwellings remain as affordable rented and shared ownership dwellings in perpetuity and that in allocating the dwellings priority is given to people in housing need and with a local connection.

3. Local Connection

3.1 To be eligible for the properties an applicant must have a local connection to Broadwindsor Group Parish; hereinafter referred to as the “Parish”.

3.2 A local connection means having one or more of the following connections with the Parish. The connections are listed in priority order (a-d) and, within each priority, the sub-points are also in priority order (i, ii, iii etc):

a) Applicants must have:

i. As a priority, been continuously and permanently resident in the Parish for at least 5 of the last ten years. Otherwise and at the next level of priority, they shall have been continuously and permanently resident in the Parish for at least the past 2 years. In either case, residency should have been out of choice.

ii. Family connections in the Parish; 'family members' meaning parents, siblings and non-dependent children who currently reside in the Parish and have lived there for at least 10 years. Other categories of relationship may be considered where clear evidence of frequent contact or commitment, or dependency is shown. If this criterion is not fully met then the period may be reduced to 5 years

iii. Been in continuous permanent (over 16 hours per week) employment or self-employment in Broadwindsor Group Parish over at least the preceding 2 years;

OR Agreed special circumstances with the CLT that are deemed to be equivalent to the categories above, such agreement then being approved in writing both by the Landlord and by the District Council (or their successors).

b) Should any homes remain to be allocated after 2 weeks, then applicants with one of the connections set out in 3.2(a) to the Secondary Parishes of Thorncombe, Mosterton, Stoke Abbott, Pilsdon, Marshwood, South Perrott and Bettiscombe will become eligible, in addition to applicants with connection to the Primary Parish of Broadwindsor Group Parish, who will retain priority.

i Continuously and permanently resident in the District for at least the last 2 years, where residence has been out of choice. Residency in a property where treatment or rehabilitation of any kind whilst working will not count towards establishing a local connection.

ii Having had permanent work in the District with a minimum of a 16 hour contract per week for the previous 6 months, and without a break in the period of employment for more than three months.

iii Needing to move to take up an offer of permanent employment (over 16 hours and evidence will be required) within the District and where commuting to a new place of work from an existing home would be unreasonable.

iv Having family connections in the District; 'family members' meaning parents, siblings and non-dependent children who currently reside in the District and have lived there for at least 5 years. Other categories of relationship may be considered where clear evidence of frequent contact or commitment, or dependency is shown.

v Needing to move to the District to give or receive medical or other support.

c) Should any of the homes remain to be allocated after a further 2 weeks then the applicants with one of the connections for geographic area of west Dorset, then the Dorset Council area, will become eligible in addition to applicants with connection to the Parish, who will retain priority. The connections for the geographically west area of Dorset Council are stated below.

i. Continuously and permanently resident in the District for at least the last 2 years, where residence has been out of choice. Residency in a property where treatment or rehabilitation of any kind whilst working will not count towards establishing a local connection.

ii. Having had permanent work in the District with a minimum of a 16 hour contract per week for the previous 6 months, and without a break in the period of employment for more than three months.

iii. Needing to move to take up an offer of permanent employment (over 16 hours and evidence will be required) within the District and where

commuting to a new place of work from an existing home would be unreasonable.

iv. Having family connections in the District; 'family members' meaning parents, siblings and non-dependent children who currently reside in the District and have lived there for at least 5 years. Other categories of relationship may be considered where clear evidence of frequent contact or commitment, or dependency is shown.

v. Needing to move to the District to give or receive medical or other support.

c) Should any of the homes remain to be allocated after a further 2 weeks then the applicants with one of the connections below to the South Somerset District Council Area West[1] will become eligible in addition to applicants with connection to the Parish, who will retain priority.

i. Continuously and permanently resident in the South Somerset District Council Area West for at least the last 2 years, where residence has been out of choice. Residency in a property where treatment or rehabilitation of any kind whilst working will not count towards establishing a local connection.

ii. Having had permanent work in South Somerset District Council Area West with a minimum of a 16 hour contract per week for the previous 6 months, and without a break in the period of employment for more than three months.

iii. Needing to move to take up an offer of permanent employment (over 16 hours and evidence will be required) within South Somerset District Council Area West and where commuting to a new place of work from an existing home would be unreasonable.

iv. Having family connections in South Somerset District Council Area West; 'family members' meaning parents, siblings and non-dependent children who currently reside in South Somerset District Council Area West and have lived there for at least 5 years. Other categories of relationship may be considered where clear evidence of frequent contact or commitment, or dependency is shown.

4. Housing Needs

4.1 Applicants must be in housing need. This means the circumstances where a household is currently occupying accommodation that is substandard or unsuitable for its requirements and/or has an income that is too low to sustain the cost of accommodation appropriate to their circumstances on the open market.

4.2 Verification of the need for rented housing will be carried out by registration on the Council's waiting list.

4.3 For the shared ownership properties, all applicants approved by a Help to Buy agent (Help to Buy South West). First priority will be given to those who are eligible in accordance with the above local connection criteria and who are existing council and housing association tenants or Ministry of Defence personnel.

[1] South Somerset District Council Area West is defined as the towns and parishes of Ashill, Broadway, Buckland St Mary, Chaffcombe, Chard, Chillington, Chiselborough, Combe St Nicholas, Crewkerne, Dinnington, Donyatt, East Chinnock, Haselbury Plucknett, Hinton St George, Horton, Ilminster, Merriott, Misterton, North Perrott, Tatworth & Forton, Wambrook, West & Middle Chinnock, Whitelackington and Whitestaunton.

5. Application of Criteria

5.1 The Landlord is responsible for lettings. Residents will be tenants of the Landlord.

5.2 Applications will be prioritised by Local Connection and then, if there are more applicants at any level of the cascade than there are homes, by Housing Need.

5.3 Where two or more applicants have equal status in terms of local connection and housing need, their length of time on the Council's Housing Register will be taken into consideration.

5.4 As affordable rented homes are in short supply, a home with a spare bedroom would not be offered except in the following circumstances:

- where a member of the family has a long term illness or disability and may need a carer to stay overnight on a regular basis
- where, after allocating two bedroom homes to families with children or dependent relatives, some homes remain available, couples with a local connection may be considered for that property
- where children, who normally live with their other parent, frequently stay overnight

Under occupancy on this basis will be considered at each stage in the cascade.

6. Advertising of Vacancies

6.1 On the first lettings, the Landlord and the Trust will hold an open meeting 6 months before the expected completion date of the properties to provide information and advice.

6.2 The Landlord will notify the Trust of all rental vacancies. Rented properties will be advertised on Dorset Home Choice. In the event that DHC is unable to provide this service, or the definitions of the Bands should change, the Trust and the Landlord will ensure that future applicants who would formerly have been eligible for the properties by having a local connection and being eligible. The Trust and the Landlord will formally amend this Allocations Plan accordingly (and with it, the Section 106 Agreement.) If the property is to be sold under a Shared Ownership lease it will be advertised by Help to Buy South West.

6.3 When notified of vacancies the Trust will use local communications to ensure as many local people as possible know about the vacancy and how to apply.

7. The Offer Process

7.1 Prior to an offer being made – and subject to compliance with GDPR legislation - the Landlord will provide the Trust with applicants' names and stated local connections in order that the Trust can use its local knowledge to verify the applicant's local connections.

7.2 In the event of a disagreement, the Landlord will make the final decision.

8 Disputes Procedure

8.1 The Trust and the Landlord undertake to use their best endeavours to resolve any issues, complaints or disputes in respect of the operation of this Allocations Plan or any other matter pertaining to this Allocations Plan amicably, through discussion and co-operation. In the unlikely event of failure to agree the issue shall be referred for determination by a mutually agreed single arbitrator to be agreed upon by the parties or in default of agreement to be nominated by the President for the time being of the Chartered Institute of Arbitrators in accordance with the Arbitration Act 1950 or any statutory modification or re-enactment of it for the time being in force. The cost of appointing the arbitrator will be shared equally between the Landlord and Trust.

8.2 The parties agree that any complaints or matter of dispute from an applicant or third party regarding the performance or non-performance of obligations under this Allocations Plan or any other matter pertaining to this Allocations Plan should usually be addressed or referred to the Landlord.

9. Legal Succession

9.1 Where a Party changes its name or legal identity but otherwise retains the same function and purpose through succession, all duties and obligations under this Allocation Plan will automatically transfer to the successor.

10. Variation

10.1 This Allocations Plan and its provisions shall only be capable of amendment by a written agreement signed by the Trust and the Landlord

Signed on behalf of Broadwindsor Group Parish CLT Ltd

Signature.....

Position.....

Dated .....

Signed on behalf of Abri

Signature .....

Position.....

Dated.....