

# HILLCREST NURSERIES SITE

## PLANNING APPRAISAL



PHOTOGRAPH OF THE 1-200 SCALE MODEL LOOKING WEST ACROSS BRENTWOOD ROAD

SEPTEMBER 2013

# Hillcrest Nurseries, Ingrave, Brentwood, Essex

## 1) INTRODUCTION

I. The reason to propose some development on the unused part of Hillcrest Nurseries came from the Village Appraisal and from the evident shortcomings of the 1913 access that remains the only combined pedestrian and vehicular access and egress for the Ingrave Johnstone Church of England Primary School. Once the School access was examined by professional highway engineers, and the School Head Teacher and Governors were consulted, it became evident that the shortcomings of the present access went far beyond what can be appreciated by casual observance of the status quo: the access is used by school children, their parents, visitors to the school, by tradesmen and a number of different types of vehicles, not least the cars of School staff, delivery and refuse vehicles.

## 2) THE SAFETY AND OPERATIONAL NEEDS OF THE INGRAVE JOHNSTONE CHURCH OF ENGLAND PRIMARY SCHOOL

I. Whilst the present access is the only manoeuvring area for vehicles it is also the School car park and it cannot accommodate even 50% of the vehicles that use the School daily, many teachers are obliged to park in Thorndon Approach, the Meadows or Whitby Avenue. Refuse vehicles have to back into the access from Brentwood Road, this causes congestion on the A128 as does the coach parking associated with School swimming lessons and trips when a coach is obliged to park in the A128 across residential driveways, as it is too large to enter the present School access. When a delivery vehicle is in the accessway any other motor vehicle arriving at the School has to reverse back into the Brentwood Road as the access is not wide enough for cars to make a three point turn; in addition, as there is no vehicular sight line to the south, vehicles forced to reverse into the Brentwood Road have to rely upon any vehicle approaching from the south having the time to slow down. On average seven delivery vehicles visit the school everyday.

II. The proposals allow for an adequate amount of secure parking for school staff and visitors on site, in purpose-built car parks, and for a dedicated coach parking bay in the proposed Close away from Brentwood Road, whilst refuse and delivery vehicles will be able to enter the site from Brentwood Road in forward gear and leave in forward gear, sight lines to Brentwood Road will allow vehicles to manoeuvre safely.

III. The present access is badly maintained and not drained properly, the proposals include for drainage to contemporary standards, as set out in the Report by professional drainage

engineers Brand Leonard, whilst the whole of the access to the School is intended to look much smarter than the status quo.

IV. Full details of the Transport issues, including the highway requirements for emergency vehicles, are included in the Transport Statement prepared by engineers Waterman Transport.

V. Self evidently the works for the School can only be built upon part of the Hillcrest Nursery land.

## 3) THE SHELTERED HOUSING PROPOSAL

I. The proposed Sheltered Housing scheme is also a Special Case although the relevance is less obvious than with the needs of the School: The Village Appraisal, the four public exhibitions, the questionnaires and the fact that approximately 550 local people are of 60 years of age and over, have indicated a local need for some sheltered housing for the active retired. The need begs the question, "Where should a sheltered scheme be built?". The proposed scheme is for a site that is in the centre of the two villages, at the southern end of Ingrave and to the north of Herongate. The site is within easy walking distance of the Village Post Office/General Store and adjacent to the bus routes on the A128, the site is also within the village envelope.

II. Herongate and Ingrave are tightly surrounded by land designated Green Belt, as shown on the enclosed extract of the plan from the Brentwood Replacement Local Plan. Any other site would not be within the village envelope and would not satisfy the convenience criteria in terms of a central position, access to the Post Office/General Store and close proximity to the bus routes. The lack of any other suitable site in the Villages suggests that the need for a local sheltered scheme can only be satisfied by utilising the part of Hillcrest Nurseries indicated in the proposals. As the "Special Case" definition requires the use of Green Belt for development that needs to be undertaken, and as there is no other site in or out of the Green Belt that satisfies the requirements for a sheltered scheme for the active retired, then this site, that happens to be ideally positioned, is the only way in which the defined local housing need can be satisfied. The local need for sheltered accommodation in the Herongate/Ingrave community, demonstrates a "Very Special Circumstance" in NPPF terminology.

III. Originally a three storey scheme of 44 sheltered apartments was proposed, this was withdrawn from the planning process as some local people were of the opinion that a three storey development was out of keeping with the generally two storey local development around the site. The five detached house



scheme was offered as a different form of housing development so as to give local people a choice between two types of housing for which there was known demand. The five house scheme was turned down by the LPA and the scheme taken to Appeal. The Inspector acknowledged that the School access was, in his words, “far from satisfactory” whilst confirming that in his opinion there was no local need for more detached housing. In the light of the Inspector’s comments the proposals have been amended. Sheltered Housing is now proposed at two storeys in height, relates to known local need, and is set further away from the Brentwood Road than the detached housing proposal with an extensive greensward introduced along the western side of Brentwood Road.

IV. As indicated in the Arboricultural Report, many of the trees on the proposed site are Grade C or below, many are damaged as a result of neglect and age whilst many of the trees have grown into each other. The new proposals give the opportunity to provide remedial work to the trees that are worth saving and to introduce a variety of semi-mature species particularly into the new greensward that should reflect favourably upon the vistas from Brentwood Road and the houses opposite, very careful attention has been given to the selection of varied tree species and to the landscaping scheme. The intention has been to create a tree and planting scheme that will enhance this part of the Villages. In addition, and allied to the scheme being set back from Brentwood Road, the new trees will cause the Sheltered Scheme to be well screened from the A128. The distance of the nearest part of the eastern wing of the Scheme to the front of the houses to the east of Brentwood Road is approximately 35 metres, 116 feet. The proposed greensward is 7.5 metres (24 feet) wide, adjacent to the east wing of the building.

#### 4) THE GREEN BELT AND “OPENNESS”

- i. The site is surrounded on seven of eight sides, that is 88% surrounded by existing development, the School to the north-west and north and housing development, including the Esso petrol station, on the other sides, the furthest house, within the surrounding development, is only just over 100 metres away from the site. The dictionary confirms that “countryside”, is defined as “open land, away from towns and cities, usually characterised by moors, woods, hills, fields etc”. The dictionary defines “open” land as “an area of open country, an area not obstructed by buildings”. Is the Hillcrest site an area of “open” countryside given that it is 88% surrounded by existing development in close proximity to the site? The site is not “open” and cannot therefore be said to exhibit “openness”.
- ii. The satellite photography also indicates that the area of Hillcrest Nursery not within the scheme is approximately the same size as the Ingrave Cricket Ground on the east side of the Brentwood Road. These two pieces of land, taken together with the village/school playing field, define the “green gap” between the built areas of Herongate and Ingrave. (Please see aerial photograph on the back cover.)
- iii. As to the “effect on the character and appearance of the area”: Local people have no access to the Hillcrest Nursery land, the subject of this planning application, public amenity is, therefore, purely visual. The proposed changes to the character and appearance of this small area, not least due to the works to the trees worth keeping due to their reasonable condition and the introduction of the greensward and new tree planting, will enhance the character and appearance of this part of the villages. The 5 house scheme did not include



PROPOSED GREENSWARD FROM THE SOUTH

a greensward to Brentwood Road. The existing site frontage to Brentwood Road also forms a "pinch point", in the centre of the villages, the greensward will improve the character and the appearance of this area which will be much enhanced by the proposals. In addition the design of the sheltered scheme has been formulated so that only the eastern end of only one wing of the building faces Brentwood Road, it is set back 11 metres from the road and is 16 metres wide, for comparison purposes the continuous elevation of the terrace of houses to the north of the site is 50 metres in length and not fronted by a greensward or tree planting. The semi-mature, six metre trees, have been proposed to both shield the sheltered scheme from Brentwood Road and to enhance the street scene, particularly the visual amenity from Brentwood Road.

- IV. The arboricultural Report has been prepared by Stephen Bones, TechArborA, Tech Cert, FD Forestry, ND & NC Arboriculture of Haydens Arboricultural Consultants and the landscaping scheme by Abby Smallwood, BSc (Hons), Dip LM, CMLI, of Land Creative.

## 5) LOCAL REACTION

- I. Apart from the safety and operational needs of the School the other prompt to embark upon planning a scheme for the unused Hillcrest land was the comment in the Village Appraisal, prepared by local people, regarding sheltered retirement housing. In that document approximately 210 people are recorded as having seen the need for some sheltered housing in the two villages. So as to investigate local opinion further four exhibitions have been mounted in the St. Nicholas Church Hall, the last two in November and December 2012. At the exhibition held on 8th December 2012 the visitors were local people who had noted that the prospective scheme managers' representative would be on hand to discuss running costs and the services available from the type of Sheltered Housing proposed. Of the 35 visitors 33 were in favour of the proposals. The 2012 exhibitions were preceded by the circulation of a brochure giving brief details of the proposals with a questionnaire included. Of the 820 questionnaires delivered 199 replies were received, 86 replies were in favour of the proposals and 113 replies against.
- II. The Brentwood Replacement Local Plan, adopted in August 2005, states at policy H9iv, that the realisation "of other planning objectives" may take precedence over Affordable Housing provision. The safety and operational needs of the school, and the related costs of providing the various works, appear to be the type of case the policy was designed to accommodate.
- III. With approximately 550 people in the two villages of 60 years of age and over and with no sheltered accommodation presently available in the two villages, Heron Court is reserved for dementia patients only, there is a need for some local sheltered accommodation. This need is reflected by the views of the 210 people recorded in the Village Appraisal, the 86 positive replies to the questionnaires and the people who attended the exhibitions so that they could find out more about the proposals given their own needs in retirement. 550 villagers of 60 years of age and over suggests that they make up about 350 households. All the evidence suggests that there are more than 27 people who would like the opportunity to downsize from under-occupied family housing and to liberate capital for retirement whilst being able to remain in their own community. Sufficient to state that recycled family houses that are underused take some of the pressure away from the need to release land for new family housing elsewhere which will have to be built at a much lower density, and therefore, with a much greater land take than sheltered housing.
- IV. There are some local people who do not wish to see the site developed, however they do not appear to have taken careful note of the needs of the School or of the needs of local retired people. Given the comments in the Village Appraisal, the reaction to the exhibitions and the replies to the questionnaires, it is clear that of those people that have taken the trouble to consider the scheme in some detail there is a majority in favour of the proposals because they see them as beneficial to the School, beneficial to retired people and an opportunity to greatly enhance the visual impact of what has become a neglected part of the village scene and one that, presently, villagers are unable to access.
- V. Pedestrian access to the playing field has been repositioned at the western end of the visitors car park, as has access for mowers, this repositioning allows the western end of the present school access to be incorporated into an enlarged school playground without restricting public access to the playing field.
- VI. Local people are concerned regarding the Green Belt notation of the land; will the development of the northern half of Hillcrest lead to a flood of other Green Belt applications? The application for full planning permission is a "one-off" that would not have been put forward but for the safety and operational needs of the School and the need for some sheltered retirement housing in the Villages, the proposals come within the "Very Special Circumstances" aspect of the NPPF and are not a forerunner of the large scale housing development that villagers would object to and which, in any event, would be inappropriate for numerous reasons. Herongate and Ingrave could not sustain large scale housing development and there is no local need for it.
- VII. It is respectfully contended that the weak Green Belt notation of the land is significantly overridden by the "Special Case" nature of the proposals for the School and the need for local sheltered housing, both of which represent "Very Special Circumstances" (NPPF) due to the lack of any other site with the necessary characteristics.
- VIII. The cost of the works for the School, to include the extended School playground, amount to £358,000.00, the land cost is approximately £300,000.00 and a £100,000.00 contribution has been offered to the School as the Governors have confirmed a need for updated School offices for which there is no other source of funds. The proposed investment in the School is, therefore,



in excess of £750,000.00, an investment that is not available at this time other than from the development of the Sheltered Scheme. The benefits to the School are well in advance of any Affordable Housing Charge that would relate to a small Sheltered Scheme of the type now proposed. The financial commitments to the School are covered in the Section 106 Agreement that forms a part of the full planning application, this document includes the Quantity Surveyors' estimate of the cost of the works for the School. (Additional offsite works are referred to in the UPO/106 Agreement).

IX. The UPO/SECTION 106 Agreement that accompanies the full planning application, restricts the opportunity to place a reservation on a new sheltered apartment to local people for three months from first release of the properties into the marketplace.

**6) CONCLUSION**

I. Section 3.42 of the Brentwood Replacement Local Plan, adopted in August 2005, confirms that the Council will look to the results of Village Appraisals when assessing local housing need. The section also states: "It would need to be proven that the need for such housing was justifiable, socially and economically, both in the short and longer term and that no reasonable alternative accommodation already existed." This section is applicable to the housing provision now offered.

II. The safety and operational works for the School can only be constructed on the land surplus to the requirements of Hillcrest Nurseries. The need for some local sheltered housing has been demonstrated by the Village Appraisal, the reaction to the Exhibitions, the fact that approximately 550 people are 60 years of age and over, and the replies to the questionnaires. The land from Hillcrest Nurseries is the only land that is suitable for sheltered housing in Herongate and Ingrave for the reasons set out above.

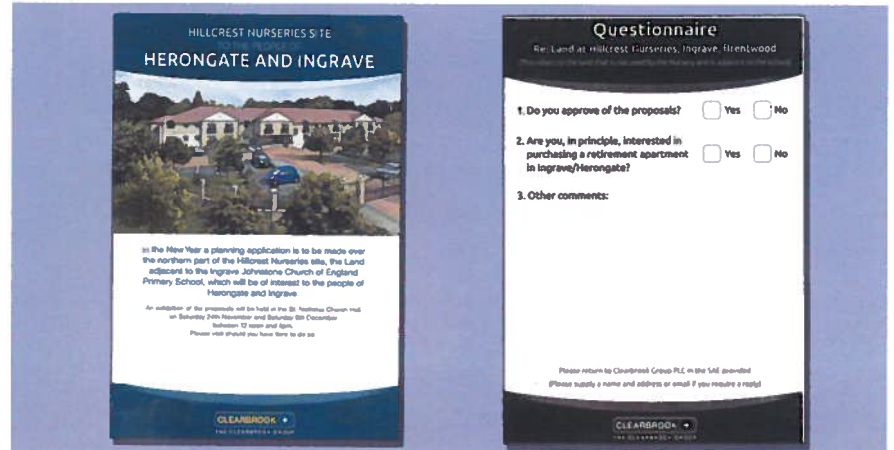
III. Herongate and Ingrave are tightly surrounded by Green Belt, as indicated by the enclosed extract from the Brentwood Replacement Local Plan. Whilst the Green Belt designation was no doubt well meant, it allows no account to be taken of the changing housing needs of the people of the two villages.



**EXHIBITION DISPLAYS**



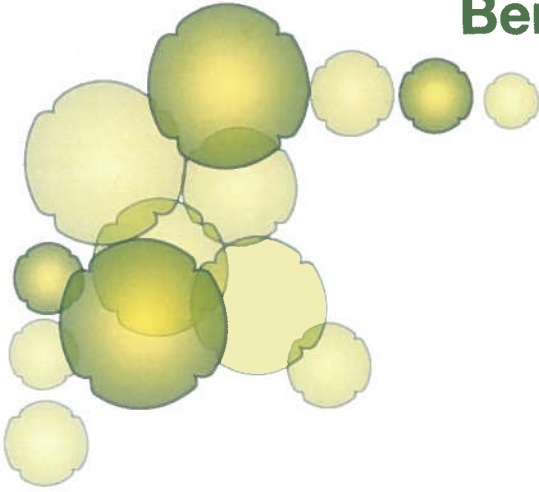
**1-200 SCALE MODEL**



**BROCHURE AND QUESTIONNAIRE**



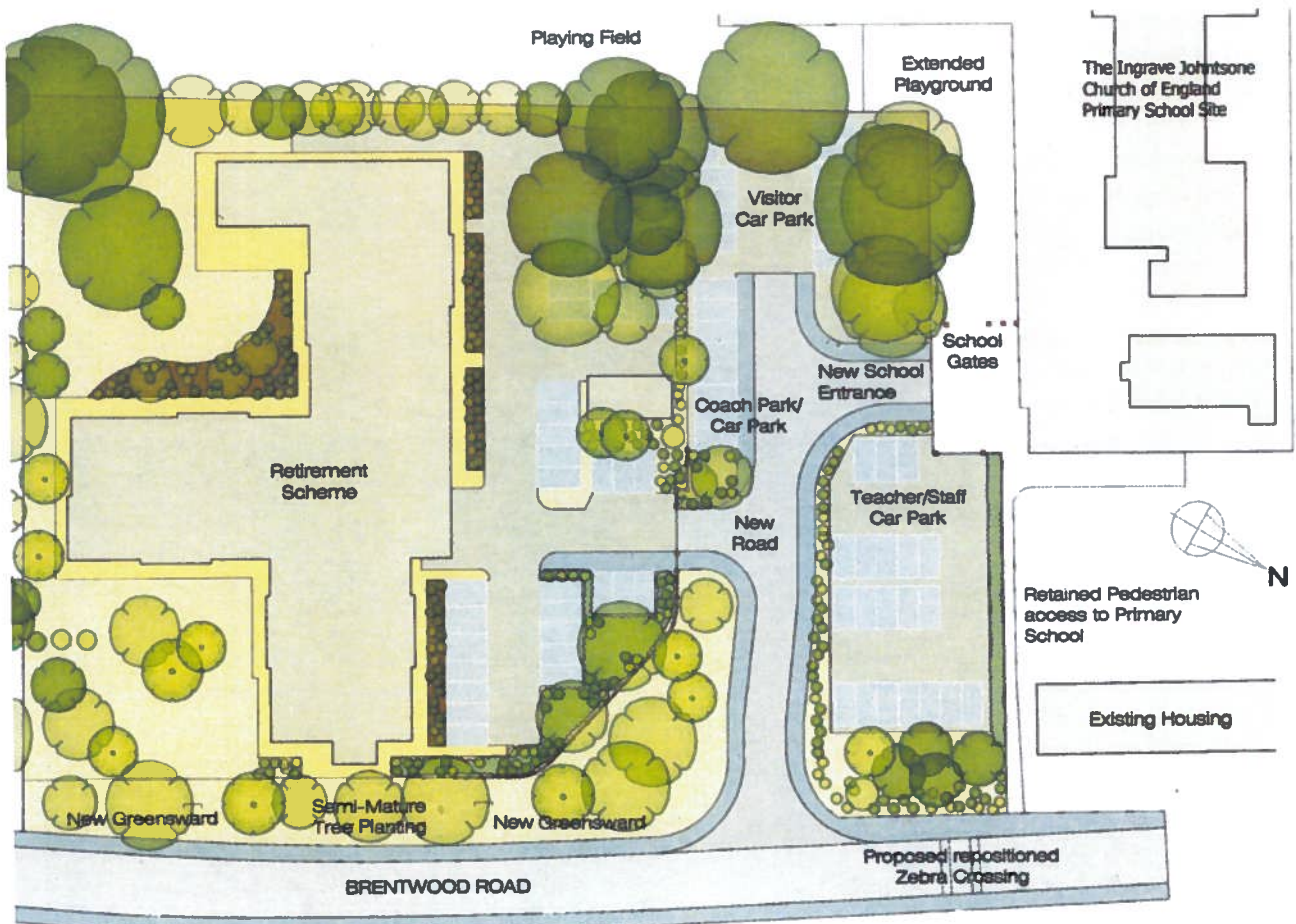
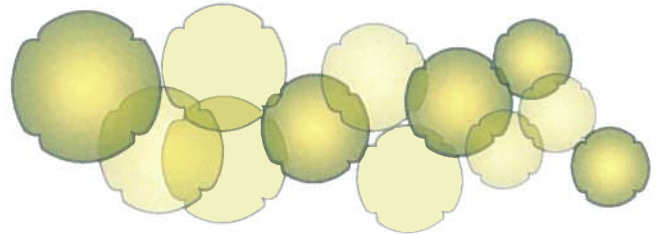
# Benefits of Retirement Schemes



- Security
- Companionship
- Social outlet
- Opportunity to remain in own community
- Arrangement
- Of medical support, if required
- Call centre available 24/7 for emergencies
- Independence with access to staff, when necessary
- Shared communal costs

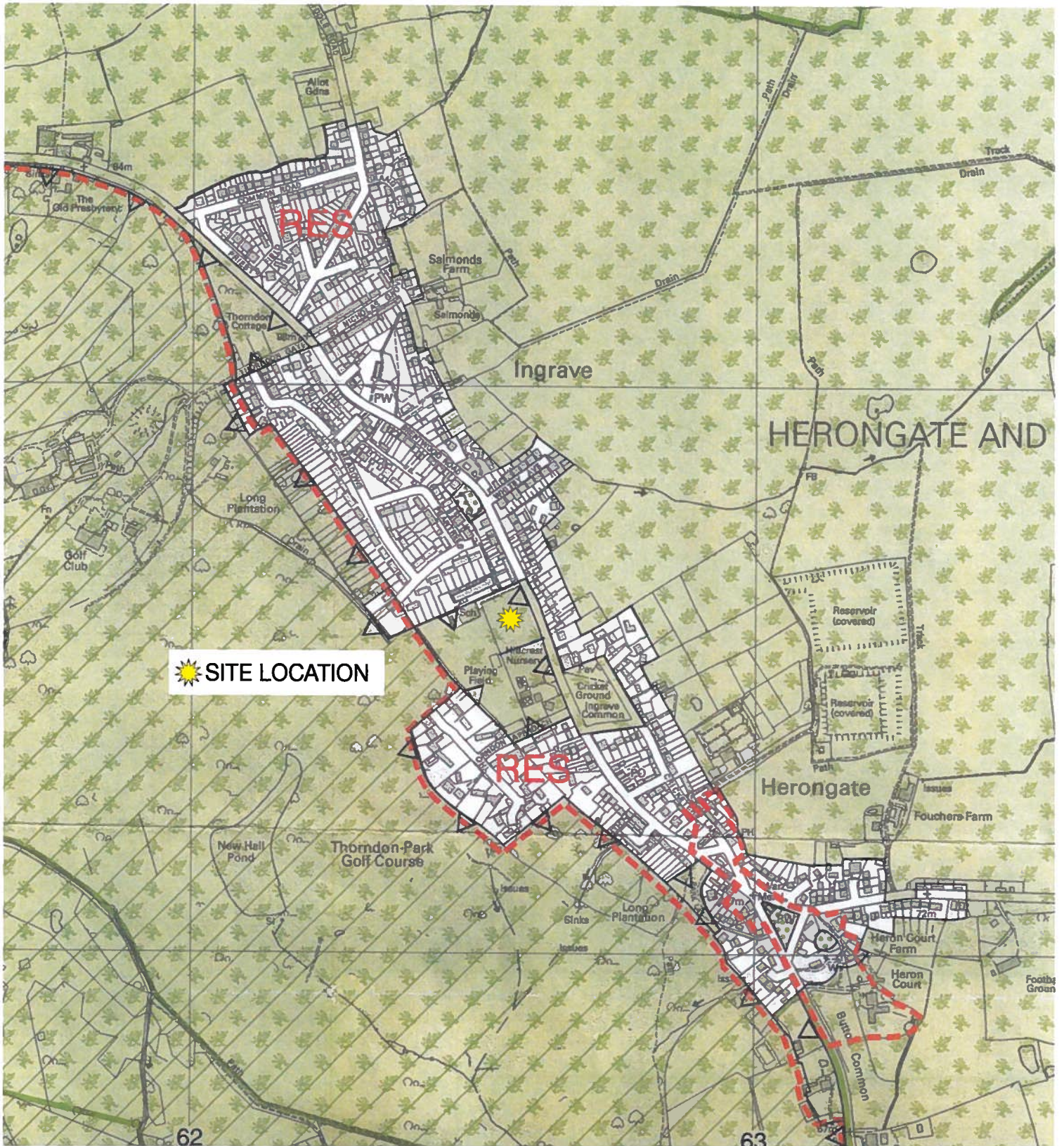
## Site Plan

As included within the brochure that was circulated in November 2012 to all households in Herongate and Ingrave





# Herongate and Ingrave



Land zoned residential and as green belt





The Governors

## INGRAVE JOHNSTONE C of E PRIMARY SCHOOL

Brentwood Road, Ingrave, Essex, CM13 3NU

Telephone: 01277 810218 Fax: 01277 810173 Email: [admin@ingravejohnstone.essex.sch.uk](mailto:admin@ingravejohnstone.essex.sch.uk)



28th November 2012

Dear John,

### Re Hillcrest Nurseries Site

In reply to your letter of 22nd November, if £100,000.00 were to be available to the Governors as payment instead of an Affordable Housing Charge this would be spent in enlarging the school office, providing a medical room for children who become unwell at school and creating a reprographics room.

If I can explain in more detail, this year the School obtained planning approval to demolish our dining hall and construct a new multi purpose hall plus extending our office as set out above. The preliminary estimates indicated that the budget the school had accumulated over many years for these projects would be sufficient, however when the estimates for the two schemes came in it was clear we didn't have sufficient funds for both projects. The hall project went ahead as the old hall was in a poor state which included substantial areas of asbestos. The new hall was completed in the last few months unfortunately with an over spend.

The extension to the office is badly needed as the existing office was constructed in 1913 to accommodate the then School Secretary, it now has to accommodate 3 members of admin staff. This is due to the change in demographics of the area from a rural hamlet in 1913 serving a largely farming community to an urban conurbation. The school today accommodates in excess 200 children and 20 staff, and the devolvement of responsibility of management to schools from County results in more admin duties.

We don't have a dedicated 1st Aid/Sickroom to accommodate children who become unwell at school. At present children have to sit in a corner of the overcrowded office and have no privacy which is unacceptable particularly for the older girls who may need a quiet area to lie down.

Our reprographics have to be carried out in the main access corridor partially blocking the main access/egress route within the school.

As mentioned earlier we have planning approval, plans drawn up for the extension to the school and would be ready to proceed if funding were available.

Ingrave Johnstone School is a voluntary aided school so for all capital schemes the Governors have to find 10% of the total cost of the project, which you probably understand is very difficult in today's financial climate.

I hope this confirms how we would spend the monies should they be received and our urgent need for funding. Should you require any further information please do not hesitate to contact me.

*Richard Horton*  
Chair of Governors





The Governors

## INGRAVE JOHNSTONE C of E PRIMARY SCHOOL

Brentwood Road, Ingrave, Essex, CM13 3NU

Telephone: 01277 810218 Fax: 01277 810173 Email: [admin@ingravejohnstone.essex.sch.uk](mailto:admin@ingravejohnstone.essex.sch.uk)



Mr John Isabel  
Clearbrook Group PLC  
Brook House,  
South Street,  
Brentwood,  
Essex.  
CM144BJ

Dear Mr Isabel ,  
**Re Hillcrest Nurseries Site**

5th June, 2013

Further to your recent letter I have set out the information below as requested.

- 1) The present access road can accommodate up to 12 motor cars.
- 2) 8 staff walk or cycle to School.
- 3) The total Staff complement of the School is (44) teachers and other staff.
- 4) On average 7 delivery vehicles attend the School each day
- 5) More than half of the Staff who come to work by car, park in the roads known as Thomdon Approach, Peartrees, The Meadows, which can be up to 15 motor vehicles.
- 6) We have a coach to pick up and deliver children back to the School at least once a week for swimming lessons and once or twice a month for School trips; the coach has to park across driveways in Brentwood Road.
- 7) Visitors to the School park in the access road if space is available, but usually in the surrounding roads.
- 8) There is presently no provision for disabled parking at the School.

### CONCLUSIONS:

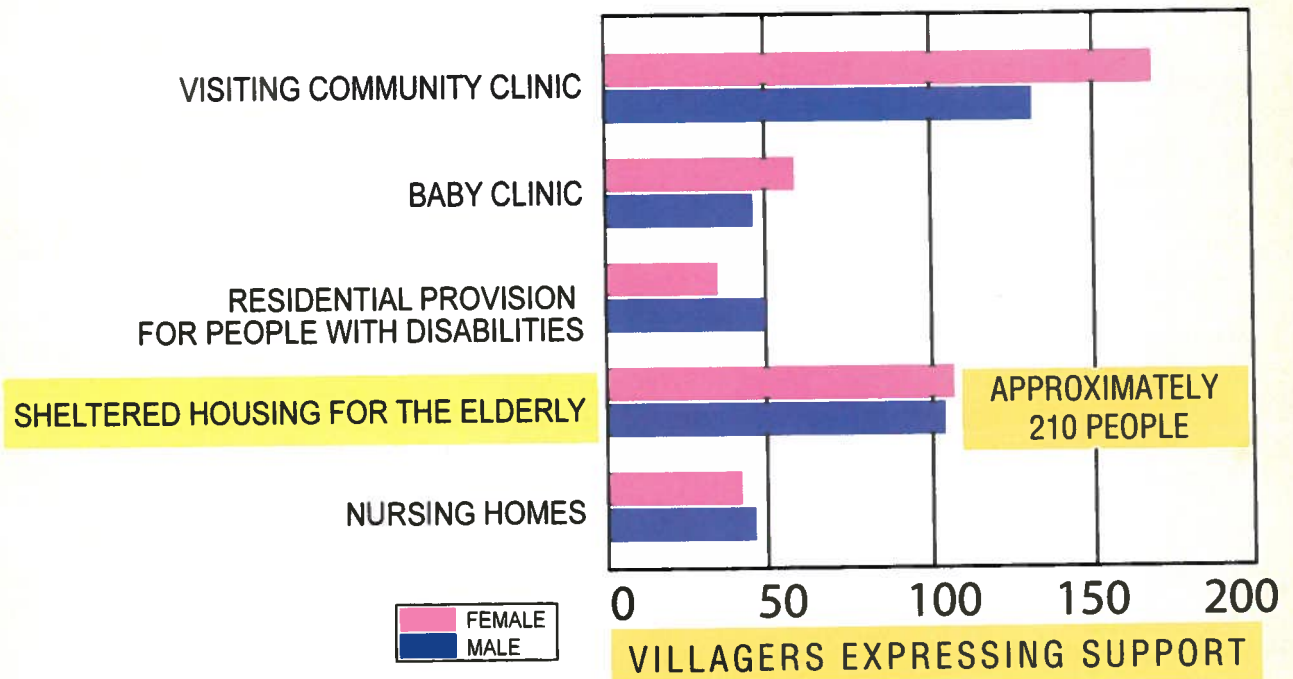
For all School Staff to park on-site, an adequate Teachers/Staff car park is required whilst coach parking away from Brentwood Road is also required. In addition provision for adequate entry to the School for emergency, refuse collection and delivery vehicles is required, not least to allow them to avoid congestion in the present access and to be able to enter the School site in forward gear rather than having to reverse, as is the present case, from Brentwood Road. The sight line to the Brentwood Road is in my opinion inadequate for vehicles leaving the School in forward gear. For vehicles forced to reverse onto the A128, when the access is blocked by a delivery or refuse vehicle, the southerly sight line is non-existent. The present access is the access for cars, delivery vehicles, refuse vehicles, emergency vehicles and pedestrians, which has not altered since 1913 and urgently needs to be updated to improve and provide a safe access for vehicles and pedestrians attending the School. Should the proposed redevelopment go ahead I confirm the existing access road to the School would be closed as it would no longer be needed as the new road will provide access to the School, the new development and the playing field. The proposed development would also allow for a dedicated disabled parking space for the School as well as providing car parking spaces for visitors to the playing field outside of School hours.

The Governors are in total support of this proposed development for both the improvements it would bring to the street scene around the School, the safer access to the School and the improvements to the amenities of the School. I have attached my letter of the 28th November which sets out our financial needs to improve our office facilities and provide a medical room for our children.

*Richard Horton*  
Chair of Governors



**EXTRACT FROM  
THE HERONGATE AND INGRAVE VILLAGE APPRAISAL  
2006 - 2008**



**OFFICE OF NATIONAL STATISTICS  
POPULATION FIGURES: HERONGATE AND INGRAVE**

18th NOVEMBER, 2004

TOTAL 2008 PEOPLE

MID 2010, ONS EST.

TOTAL 2156 PEOPLE

60 YEARS AND OVER,  
NOVEMBER 2004

518 PEOPLE

60 YEARS AND OVER,  
MID 2010, ONS EST.

551 PEOPLE

34 people with dementia are cared for in  
The Heron Court nursing home.

Although Herongate and Ingrave have More than 500 residents of 60 years of age and over the villages do not have any residential accommodation designed for the needs of the active retired.

33% of the adult population of the two villages is 60 years of age and over, currently 551 people.



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**CANTON~THOMAS**  
**Architects Ltd**

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**Project: 02012**

**27 no. Retirement Apartments on land adjacent to Hillcrest Nursery, Brentwood Road, Ingrave, Essex.**

**A Brief Report on the Exhibition of The Scheme Proposals held at St Nicholas Church Hall, Ingrave, on Saturday 8th December 2012.**

The exhibition was attended by David Thomas BScArch (Hons) Birm. Dip Arch.ARB. of Canton-Thomas Architects Ltd. and Larry Sears, Regional Manager of the Kingsdale Management. The purpose of the exhibition was to allow local residents to view the current proposal and to explain the scheme in detail and to answer any questions on retirement living.

35 no. local residents attended the exhibition the majority of whom were of retirement age. With the exception of one person who was strongly opposed to any further development in the villages of Ingrave and Herongate, the majority of those attended were supportive. 30 no. persons were retired.

Many of those that attended were either single elderly or retired couples who live within the area and would downsize to an apartment if the right accommodation were available. Larry Sears was asked details of how the scheme would be managed and purchase details etc. It had to be explained that the scheme was not yet approved and details would follow if and when the scheme were to go ahead.

Several persons enquired as to when the proposals would be completed and expressed an interest to acquire an apartment when they were available. One lady who had taken early retirement enquired as to whether she could acquire an apartment and sub let it until she wished to take up residence herself. Larry Sears indicated that sub letting wasn't usually an option. However she appeared to be very much in favour of the proposals and would be interested if the scheme were approved.

Other questions asked were concerned with the room sizes of the proposed apartments, details of the additional facilities provided and the likely costs of a flat and when were they likely to be available. Most attendees were also very supportive of the proposals that would benefit The Ingrave Johnstone Cof E Primary School. Some were concerned with the current traffic problems, particularly on School days and were generally supportive of current proposals to provide additional coach and car parking.

Several persons commented that the current proposal being set back and "end -on" to Brentwood Road was much more acceptable than the previous proposed scheme for detached housing. They commented that currently the site was a mess and that the proposed scheme with the open space to Brentwood Road and new tree and shrub planting would improve the visual amenity of the area.

Most of those that attended the exhibition had received the circular distributed by The Clearbrook Group and had confirmed that they would return the Questionnaire with comments.

*David Thomas* BScArch (Hons) Birm. Dip Arch.ARB.



# HILLCREST COURT DRAFT ANNUAL BUDGET 2013

<b>EXPENDITURE</b>	<b>£</b>
<b>Staff costs</b>	
Salaries	15,000
Nil Pension	1,200
Recruitment! Training	600
	<b>16,800</b>
<b>Alarm monitoring</b>	
Monitoring	1,350
Telephone link	600
Maintenance	400
	<b>2,350</b>
<b>Premises Costs</b>	
Cleaning	5,000
Window Cleaning	2,300
Electricity	8,500
Water Rates	5,400
	<b>21,200</b>
<b>Court Maintenance and Upkeep</b>	
Repairs and maintenance	
Small Building Works	1,500
Equipment	5,800
Contract Maintenance	
Lift (2)	2,800
Fire and Security Systems	450
Gardening and Grounds	
Contract Labour Costs	6,000
Planting	400
Fund for Future Maintenance	15,000
	<b>31,950</b>
<b>Administration</b>	
Office Expenses	900
Telephone	1,000
Insurance	5,000
Professional Fees	2,800
Management Fee	11,000
	<b>20,700</b>
<b>TOTAL EXPENDITURE</b>	<b>93,000</b>
less:	
Guest Suite Income	(1,200)
<b>NET EXPENDITURE</b>	<b>91,800</b>
<b>Cost per apartment per month</b>	<b>£283.33</b>



Our ref: LS/Hilicrest



23rd May 2013

Mr J R Isabel  
Managing Director  
Clearbrook Group Pic  
Brook House  
South Street  
Brentwood  
Essex  
CM144BJ

Kingsdale Group Limited  
Kings House  
Greystoke Business Centre  
High Street, Portishead  
Bristol BS20 6PY  
Telephone: 01275817111  
Facsimile: 01275818133  
Email: estates@kingsdale.co.uk

Dear John,

27 SHELTERED APARTMENTS, HILLCREST NURSERY SITE, INGRAVE, BRENTWOOD, ESSEX

Whilst enclosing a draft service charge budget for the above, I take the opportunity to comment on what I believe are the key attractions of retirement living within the development you propose at the above site.

- Social outlet
- Companionship
- Security
- Peace of mind
- Sense of community
- Independence but with non-intrusive background support
- Support and expertise of a Court Manager working core hours
- Apartments linked into specialist call centre for 24 hour emergency cover
- Shared communal costs

I am aware that around 550 out of 1650 persons in Herongate and Ingrave are over 60 and that more than 50 persons have indicated their wish to sell their family homes but to remain in the villages in a retirement environment. From my experience, this is typical of a growing trend where housing provision has not evolved in line with general demographics and local need.

I hope this letter is helpful.

Yours sincerely,

Larry Sears.  
Regional Director  
Kingsdale Group

*The following six photographs  
relate to the existing school access*









# The Daily Telegraph

11th March 2013

## Retired told to face up to ageing and make plans for infirmity

An unwillingness to face up to ageing threatens to condemn the newly retired to spend their final years in isolation or institutions, a coalition of experts led by a former care services minister warns today.

The belief that people should be 'young forever' has created a taboo around ageing that could turn the elderly into 'passive victims', unable to make a choice about where they live, they said in a letter to The Daily Telegraph.

The group, which includes Paul Burstow, a former care services minister, wants more openness among those approaching old age to the idea of taking steps now, such

as downsizing, which could help them avoid moving into care homes. They are challenging the idea that it is better to stay in the family home.

The group also includes the heads of 13 charities and private companies providing housing for the elderly.

Mr. Burstow said that while people are 'economically tied' to their old homes, many might benefit in the long term from moving to somewhere adaptable while they are relatively young.

"It is is a conversation that people need to have," he said.

# The Daily Telegraph

14th March 2013

## Woeful preparation for ageing population will cause misery, say Lords

By Robert Winnett, Political Editor

Britain is "woefully underprepared" for a rapidly ageing population which faces a "series of miserable crises" unless the Government acts urgently, a Lords' report warns today.

Elderly people should already "be concerned" about care in hospitals as the NHS is "not good enough" and the problems will become worse, it says.

The number of pensioners is forecast to rise by half by 2030, and over-85s to double, resulting in a sharp increase in those with multiple long-term conditions.

The 105-page report from the House of Lords' public service and demography committee makes a series of recommendations for the Government, employers and wider society.

It says, "The UK population is ageing rapidly, but we have concluded that the Government and our society are woefully underprepared. Longer lives can be a great benefit, but there has been a collective failure to address the implications and without urgent action this great boon could turn into a series of miserable crises". The committee comprises former Cabinet ministers, mandarins and medical experts, and its recommendations will be closely studied by the Government.

Last night, Lord Filkin, its chairman, said: "The public are entitled to an honest conversation about the implications."

The committee welcomes plans to cap the maximum bill for those requiring social care but warns that the flagship announcement "will not be sufficient".

They call for a "ten year" spending deal for the NHS and social care to allow services to be properly planned.

The report highlights predictions that more than half as many extra people will be living with three or more long-term conditions in England by 2018, compared with 2008.

It also warns that the Government, pensions industry and employers need to overhaul the pension system so that those in defined contribution schemes, have a clearer idea of what income they can eventually expect.

The peers also say that the state cannot shoulder all the burden and suggest that pensioners should be offered cheap, risk-free schemes to release equity from their homes.

Michelle Mitchell, charity director general at Age UK, praised the report, saying: "it's the first time a group of senior policymakers in this country has shown it grasps the scale and nature of change needed across our society in response to the gift of longer lives."





# The Daily Telegraph

## The Housing needs of Britain's ageing population

11th March 2013

Sir,

We urgently need to rethink how to provide the right type of housing for a new generation of older people.

In 2033, there will be 3.3 million people aged over 85 in Britain, which represents our fastest growing age group. We all have unique needs and it is to the nation's shame that people of this generation are often regarded as all the same – content to see out their days in their family home, potentially isolated and lonely or forced into institutional care following a rapid escalation of their care needs.

Staying put in the family home is the right option for some. However, while often equated with preserving independence, it can also have the opposite effect, potentially limiting one's ability to retain independence and choice in the long term.

Research shows that staying put is often symptomatic of a lack of choice as to the variety of options for housing

and care available; and perhaps a lack of confidence, or indeed reluctance to make a change.

Combining independent housing with 24 hour care in a community setting presents a solution for many older people.

The Government should empower older people to make the right move at the right time; ensure that they secure access to the support they need, while maintaining their valued independence and the right to their own front door.

**Paul Burstow M.P. (Lib Dem.)**

Chairman, Draft Care and Support Joint Bill Committee

**Baroness Greengross**

Chief Executive, International Longevity Centre UK

# Daily Mail

14th August 2013

In the above edition Nick Boles, the Planning Minister, was reported to say: "the need to provide housing for older people is critical". The article also stated that advice to be given to local planning authorities by the Government would highlight the need to match the supply of local accommodation to meet the needs of an ageing population. A population that would be living independently for a longer period of time. The article further stated that half of the new households created in coming years would need to be for people of 65 years of age and over.

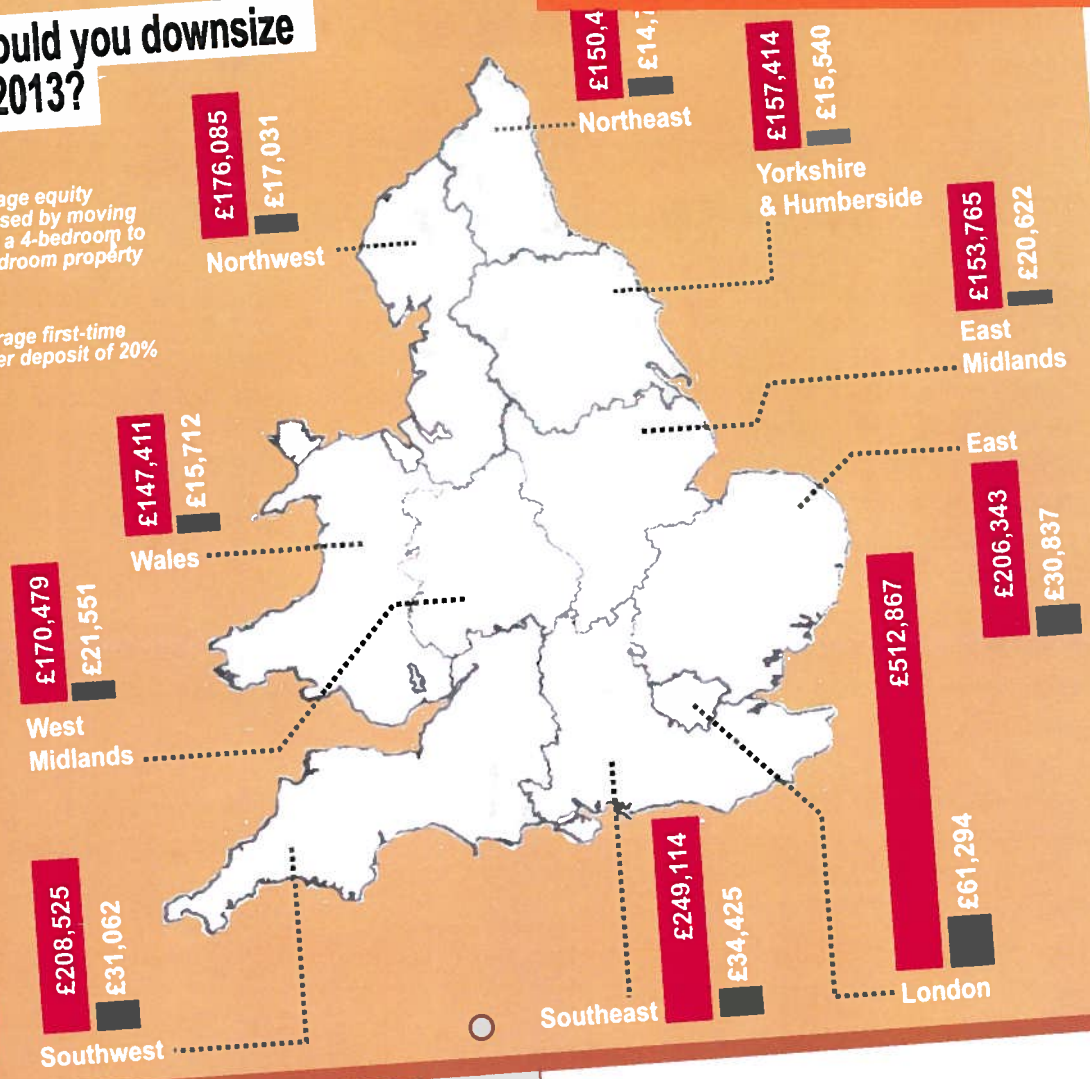


**FOR SALE**

**Should you downsize in 2013?**

Average equity released by moving from a 4-bedroom to 2-bedroom property

Average first-time buyer deposit of 20%



# Boom in downsizing to unlock equity in homes

**Households opting to move to smaller properties account for as much as a third of the market, writes Anna Mikhailova**

A GROWING number of parents are set to downsize their homes to fund retirement, cut punishing inheritance tax bills and help their children onto the property ladder, according to research.

Savills, the estate agent, predicts there will be a steady rise in the number of older homeowners moving to smaller properties over the next five years. It estimates that the amount of equity released from down-sizing will rise from £7bn to £12.5bn a year by 2017.

Residential property accounted for 34% of total inheritance tax receipts in the 2009-10 financial year, the latest year for which figures are available, according to research by Savills for The Sunday Times. The average detached house is worth just over £462,000 in southeast England and £332,304 in the southwest, Land Registry figures show.

Inheritance tax is levied at 40% on assets worth more than

£325,000. The threshold has not risen since the coalition government came to power, and will rise only 1 percentage point in 2015, to £329,000.

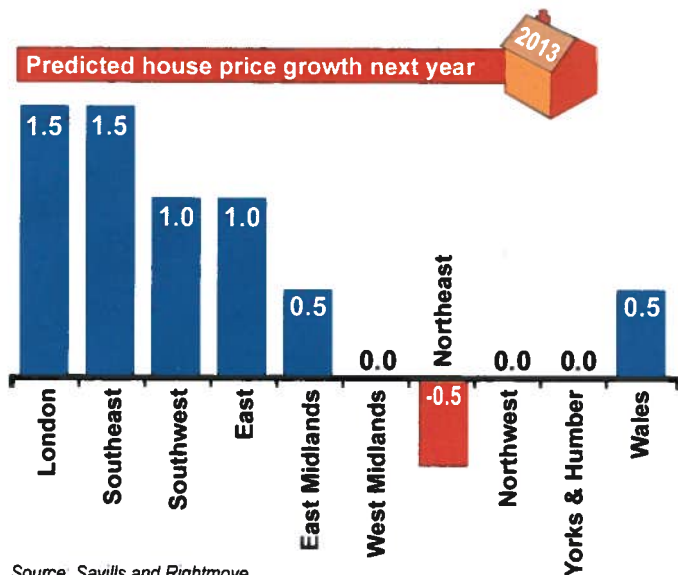
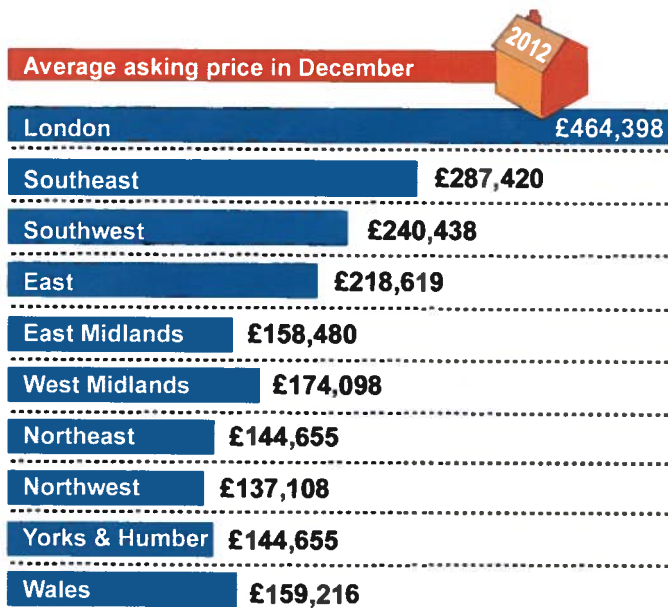
Strutt & Parker, another estate agent, said more than 25 of the homes it has sold this year belonged to downsizers. A regional breakdown shows that the highest number was in East Anglia, where more than 35% of vendors were down-sizing. In the southeast and southwest the figure was nearly a third of all sales.

## INHERITANCE TAX PLANNING

Research by Savills in England and Wales found that local authority areas with the highest house prices had the largest number of estates liable to inheritance tax, as would be expected.

In Kensington & Chelsea, where the average property price is £1.4m, just over 15% of estates incurred inheritance tax in 2009-10. In Elmbridge, Surrey, 12.8% of estates incurred inheritance tax and the average house price is £561,717.





Source: Savills and Rightmove

Danny Cox of Hargreaves Lansdown, the adviser, said: "To save on inheritance tax the taxable value of the estate has to be reduced. This can be done either by spending the money raised by downsizing or giving it away - if a house is sold to downsize and then the cash retained, there will be no inheritance tax saving."

One option is to gift the equity raised by downsizing. There are three main types of gift: those exempt from inheritance tax, those immediately subject to tax and those that may be exempt. To qualify, the person making the gift must survive for seven years. Gifts to charities and political parties are exempt, as are gifts of less than £3,000 a year to any individual.

"One alternative is to invest the money raised by selling a property into assets that are IHT exempt," said Cox.

"For example, buying woodland, investing in qualifying AIM shares or in enterprise investment schemes. Investments normally have to be held for two years before the exemption applies. These schemes are often higher risk and illiquid, so they are not for everyone."

## RETIREMENT FUNDING

Downsizing is a popular option for those nearing retirement who want an income to supplement their pension.

Savills said that downsizing from a four-bedroom home to a two-bedroom property in London would release £512,897 of equity on average, compared with £249,114 in the southeast, £206,343 in the east of England and £147,411 in Wales.

Moving from a three-bedroom home to a two-bedroom property would release an average of £189,174 in London, £81,290 in the southeast and £49,757 in the east Midlands.

Figures from Better Retirement Group, the adviser, show that £512,897 would buy a 65-year-old man a single person level annuity paying £30,348 a year. A lump sum of £189,174 would buy an income of £11,170.

One alternative to downsizing is equity release. These schemes allow homeowners to release cash by borrowing against the value of their properties. They have been criticised because the interest is rolled up and added to the debt rather than being paid off, creating the potential for a huge debt to clear when the property is sold.

A £50,000 equity release loan, known as a lifetime mortgage, taken out at a typical rate of 6.5% would grow to a debt of £93,857 after 10 years and £176,182 after 20 years, said Key Retirement Solutions, the broker.

## The Daily Telegraph

June 26th 2013

### Countryside is not a museum, says planning minister

There was more anger among the CPRE members when Mr. Boles said he wished England was more like Germany, where property prices are low because more land is released for building.

Mr. Boles said, "Nobody is doing what we crazily do, which is put all of our income into houses, bank our whole retirement into the value of our house - it is completely nuts!"

Two CPRE members walked out. One, Richard Nicholls from Dorset, said: "The man does not understand what planning is all about. The man is a fool."

Mr. Boles told the CPRE that blocking new housing developments was condemning villages to be "museum exhibits, not so much protected as embalmed."

He said: "In Devon, Cornwall, Shropshire, Sussex, the Cotswolds and the Yorkshire Dales some villages are inches away from becoming forever fossilised."





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AERIAL PHOTOGRAPH OF THE SITE AND SURROUNDING DEVELOPMENT

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