

BUILDING A LEGACY

A LANDOWNER'S
GUIDE TO
POPULAR
DEVELOPMENT



PRINCE'S
FOUNDATION

FOR BUILDING COMMUNITY





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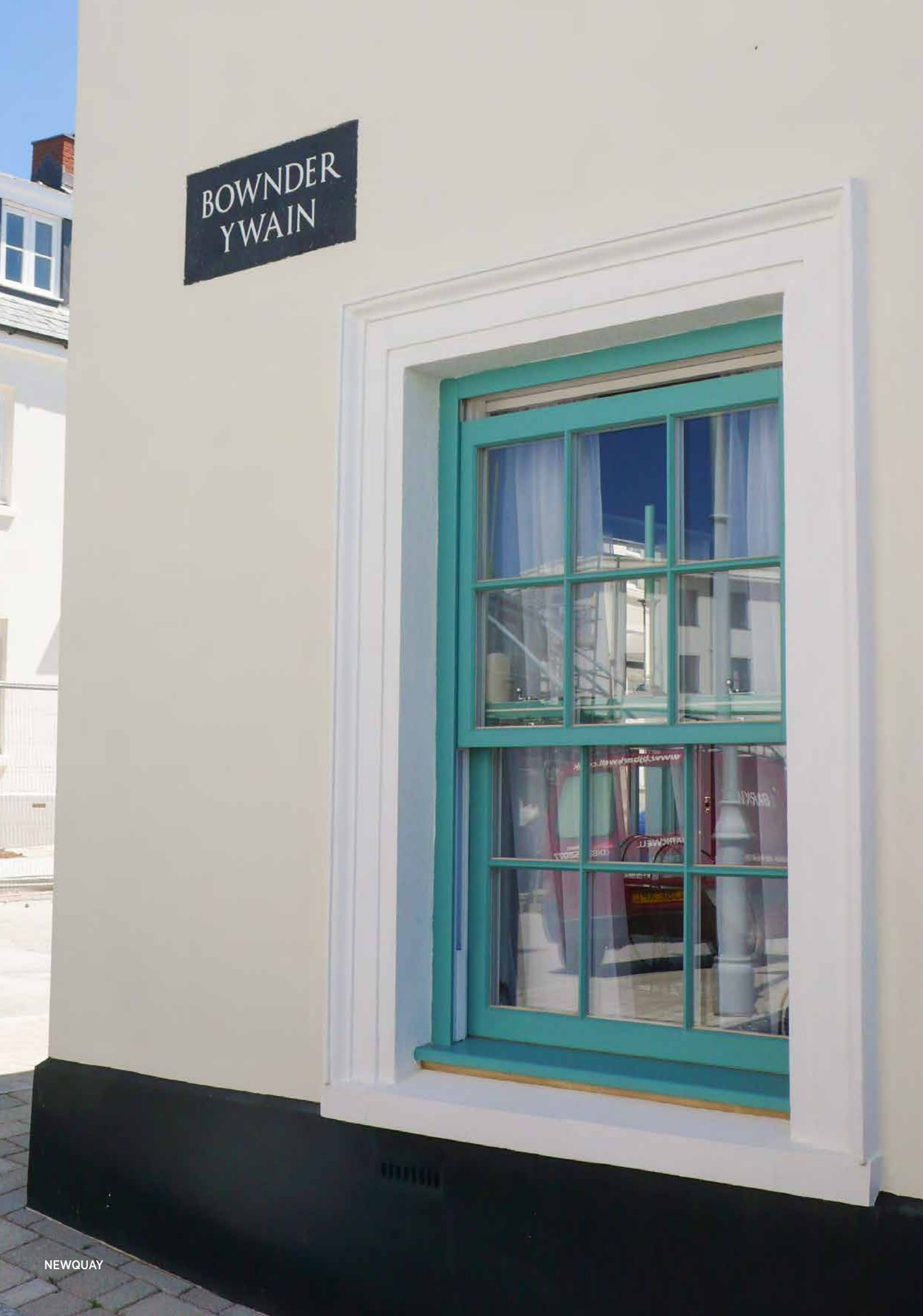
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THE PRINCE'S FOUNDATION
for BUILDING COMMUNITY:
TRANSFORMING LIVES through ENGAGING
EDUCATING and EMPOWERING PEOPLE

19—22 CHARLOTTE ROAD
LONDON EC2A 3SG
UNITED KINGDOM
E ENQUIRY@PRINCES-FOUNDATION.ORG
T +44 (0) 20 7613 8500
F +44 (0) 20 7613 8599
WWW.PRINCES-FOUNDATION.ORG

PRESIDENT: HRH THE PRINCE OF WALES
A COMPANY LIMITED BY GUARANTEE NO. 3579567
REGISTERED CHARITY NO. 1069969
VAT NO. 839 8984 44

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IN PARTNERSHIP WITH:

UCEM

UNIVERSITY COLLEGE
OF ESTATE MANAGEMENT

HORIZONS 60 QUEEN'S ROAD
READING RG1 4BS
UNITED KINGDOM
E ENQUIRIES@UCEM.AC.UK
T +44 (0) 118 921 4696
WWW.UCEM.AC.UK

PRINCIPAL & CEO: ASHLEY WHEATON
REGISTERED CHARITY NO. 313223





CLARENCE HOUSE

Having spent the best part of three decades engaging on the issue of how to build places that foster a real sense of community, I am delighted that my Foundation for Building Community is publishing this prospectus. I am afraid that there is no one single answer to this complex issue, but I am heartened that there are now a number of landowners and developers striving to design and build walkable neighbourhoods with a strong sense of local identity and community which encourage healthy lifestyles and minimize resource-consumption and carbon emissions. Needless to say, such an approach is popular with local communities and, critically, builds greater value in the long-term.

You will not be surprised to hear that this is something I care passionately about, and I have been trying, in my own small way, to create this sense of community for many years in the developments with which I have been fortunate enough to be involved. I do know, therefore, just how challenging it can be!

The U.K. is entering one of the largest building booms in its history, at a time when 80 per cent of new homes are delivered by volume homebuilders with standardized delivery models and short-term investment cycles. I can only hope that this prospectus provides encouragement to landowners and sets out the many benefits to adopting a more long-term approach.

Chanel



WHY IS IT IMPORTANT TO CARE ABOUT DELIVERING POPULAR DEVELOPMENT?

With a housing affordability crisis in the UK and pressure to build up to 300,000 homes a year, there is a real risk that the built legacy of this generation will be a country littered with soulless housing estates.

With dwindling natural resources, and new carbon reduction targets to address climate change, there has never been a more urgent moment to think very carefully about what we are building so that we don't burden future generations with short-sighted solutions. Getting the built fabric right is a way to unlock the natural, social and financial capital of an area. Getting it wrong will produce a negative impact on people's lives for generations to come.

Unfortunately, the current housing industry is geared towards delivering zoned housing estates that create the need for more energy use, increase carbon emissions and foster sedentary lifestyles. These estates take up a great deal of land and are expensive to maintain, in terms of infrastructure and energy cost, because they have been built around cars and not people.

All of the amenities which a society needs to function — primary schools, shops, public transport and green spaces — should ideally be within comfortable walking distance so that people can live wholesome and sociable lives.

The obvious answer is to create popular development that delivers 'walkable neighbourhoods' with strong local identities, encouraging healthy lifestyles and minimal resource consumption.

We intuitively know this is right, and yet somehow collectively lack the conviction to make it happen.



WHAT MAKES A POPULAR DEVELOPMENT?

Research shows that there is a general consensus throughout the UK on what kind of development is most and least popular with communities.

The principles of what makes the most popular, enduring and beautiful places have survived in centuries of place-making:

1. PLACE:



Design that respects the local character of a place and takes into consideration its history, geology, natural landscape and transport links to other places.

ENCOURAGES: Individual character and a sense of belonging to a place.

DISCOURAGES: Soulless, anonymous development that could be anywhere.

2. PUBLIC SPACE:



A recognition that the design of public areas including boundary treatments, pavements, street furniture, signage, and lighting, is as important as the design of private spaces, and should be designed as part of a harmonious whole.

ENCOURAGES: Harmonious, simple and legible public areas.

DISCOURAGES: Visual intrusion, clutter and waste on unnecessary signage.

3. CONNECTIVITY:



Urban design in which an interconnected network of streets at walkable intervals creates urban blocks defining public streets and squares and easily defensible private spaces.

ENCOURAGES: An efficient walking environment and a greater spread of traffic movement.

DISCOURAGES: Cul-de-sacs and inefficient movement with an oppressive sense of impenetrability designed around cars and utility vehicles.

4. HIERARCHY:



A clear and legible ordering system, which sets out a hierarchy of primary and secondary streets with appropriate building scale, type and materials so that a visitor understands intuitively where they are in the place.

ENCOURAGES: An understanding of the relative significance of parts of a building or place, and easy navigation within each.

DISCOURAGES: Getting lost, places having no meaning and an over-reliance on signage.

5. VALUE:



Design that creates a valuable asset in economic, social, and environmental terms, by investing in social and physical infrastructure. This includes a range of employment and community uses and productive green spaces.

ENCOURAGES: Long term investment in buildings, towns and green infrastructure.

DISCOURAGES: Buildings and places that are likely to drain the resources of future generations to no advantage.

6. LONGEVITY:



Design that creates streets and buildings that can cope with a variety of uses during their lifetime.

ENCOURAGES: Design solutions based on building types that have adapted well to change.

DISCOURAGES: Complex, inflexible plots and buildings that are very specific to current need.

7. SCALE:



Settlements that are walkable and buildings which, whatever their size, relate to human proportions; recognizing that we shape our buildings and thereafter they shape our lives.

ENCOURAGES: A relationship between people and their built environment.

DISCOURAGES: A feeling of being overwhelmed and alienated.

8. ENCLOSURE:



Design, which establishes a clear distinction between town and country, as well as public and private space, encouraging appropriate activities within each place.

ENCOURAGES: Safe, well defined environments and the full and appropriate use of available space.

DISCOURAGES: Wasteland and degraded no-go areas, which feel unsafe and have no community value or sense of ownership.

9. HARMONY:



Design that understands the whole is greater than the sum of its parts and also respects the beauty of geometry found in nature.

ENCOURAGES: Buildings and places where the various parts work together to create harmonious streets, public spaces and overall beauty.

DISCOURAGES: A confused and illegible built environment that is ugly.

10. MATERIALS:



Design that uses materials that are, wherever possible, indigenous, in keeping with the surrounding landscape, and which are selected with care to ensure they improve with age and weathering.

ENCOURAGES: Buildings that have a natural resonance with their local environment and that can be easily repaired.

DISCOURAGES: Long distance transportation of materials and buildings with short lifespans that look out of place and get worse with age.

11. DECORATION & ORNAMENTATION:



Design that incorporates ornament, not only to enhance the charm and beauty of a building, but also to help engender emotional value and personal and cultural relevance.

ENCOURAGES: Local identity and interest for pedestrians, as well as the potential for using local skills.

DISCOURAGES: Functional anonymity and sterile buildings.

12. CRAFTSMANSHIP:



Carefully built buildings that reward both the craftsman and end user and makes them likely to endure and be valued by future generations.

- ENCOURAGES: Longevity and ability to inspire future generations of builders and craftspeople.
- DISCOURAGES: Quick-fix solutions and low-grade, standardised buildings that rely on assembly only.

13. COMMUNITY:



- The carefully facilitated, early involvement of the local community in order to create places which have a positive effect, meet people’s needs and aspirations, and engender civic pride.
- ENCOURAGES: A proactive, empowering approach to planning with an understanding of what drives an existing and a new community.
 - DISCOURAGES: A reactive, piecemeal approach to planning, and a reactionary local community.

14. SUSTAINABILITY:



- The previous principles all help create inherent sustainability by building enduring and harmonious communities. Economic, environmental and social sustainability should principally be as much about engendering healthy lifestyles as about energy performance.
- ENCOURAGES: The design of places that allows efficient and healthy lifestyles, as well as enduring buildings, with a strong sense of community and belonging.
 - DISCOURAGES: Short-termism and a built environment that leads to inefficient lifestyles and lack of civic pride.





HOW CAN LANDOWNERS ENCOURAGE POPULAR DEVELOPMENT?

With a significant shortfall in housing, land is urgently needed for new homes.

The prevailing process, however, begins with a competitive land bid, leading to promotion, an option agreement and finally ending in development. This model specialises in luring landowners to take ‘money upfront’ in exchange for relinquishing control over their land, accepting lower quality development, and sacrificing the opportunity to make higher profits. It is easy to see why most landowners, trustees and their advisers see this as the easiest option.

With an increasingly vocal NIMBY culture around poor-quality housebuilding there is not only the moral question of how landowners choose to dispose of their land, but also how to encourage local communities to meaningfully contribute to the topic of development in their own areas. Whilst volume housebuilders take their fair share of criticism for the perpetuation of soulless housing estates, landowners are ultimately in control of how their land is deployed – a fact that can be easily overlooked by communities and local authorities.

With the right advice, commitment and resale values, the landowner has the choice of rejecting normal development models and ensuring their legacy is one of good stewardship, land husbandry and a moral concern for the quality of life for future generations.

Landowners have the power to challenge poor development practice by insisting that the principles of popular development are adopted, and that a team of professionals experienced in mixed-use delivery are employed at every stage of the development process.

Even though there is a growing body of evidence to show popular development can actually make more profit than the standard offer in the longer term, the most powerful way to convince landowners is by encouraging them to visit those new developments that break the mould in building new communities, and by speaking to the teams delivering them on the ground.

As pioneers of popular development, this small network of landowners, developers and other professionals are invaluable in sharing ‘lessons learned’ so that any landowners embarking on their own journey, do so with the best possible information.

The larger the proposed settlement, the more self sufficient and stand-alone it can become.



COED DARCY, NEATH

IS YOUR LAND CAPABLE OF BEING DEVELOPED IN THE RIGHT WAY?

It is advisable to take a strategic long-term approach for all scales of development.

Rather than be driven by the amount of houses that can be fitted into a development, if a longer-term approach were to be taken, natural constraints and opportunities of a site should give an indication to the new settlement's size and shape. This can then be modified to suit current housing need, or a particular local plan period, but by doing this exercise the scheme will have been sufficiently 'future-proofed' to ensure that what is designed won't constrain any future opportunity.

IS IT IN THE RIGHT PLACE AND APPROPRIATE SCALE FOR ITS CONTEXT?

For large sites that can deliver 1,200 plus homes with other mixed uses, it is important that the land is within good proximity of existing infrastructure such as public transport, arterial roads and ideally close to existing communities and their associated facilities.

The larger the proposed settlement, the more self-sufficient and stand-alone it can become. For developments of less than 1,000 homes it is important they are within comfortable walking distances of existing amenities as the critical mass isn't there for self-sufficiency.

For developments of 5,000 plus homes, one must consider the capacity of the overall settlement as a basis for setting a long-term vision. At the scale of a small town, it is large enough to support a secondary school, a local high street and a mix of employment uses that enables residents to meet their daily needs within that community. However, it is important that this scale of community should still be linked into a large town, city or significant employment area by rapid public transport, so it acts as a close satellite settlement or urban extension.

At a scale of 10,000 plus homes the new settlement could be considered a 'new town', in which case it could be totally self-sufficient, and would then need also to have the necessary railway/tram infrastructure to support movement to more distant urban settlements.

CAN IT ACHIEVE THE RIGHT SALES VALUE?

To build to the right quality, support a good mix of uses and allow small to medium sized builders an opportunity to be involved, areas of the country with sales prices in excess of £200 per square foot should be feasible providing the infrastructure costs are not prohibitive.

In parts of the UK where sales prices are likely to exceed £250 per sq. ft. there really should be no excuse for building poor-quality zoned development, unless there are exceptional build costs or excessive infrastructure costs or obligations. In sites of less than 100 homes, popular design may attract a premium and help achieve planning permission, but it is more difficult to drive up land values at this scale.

Where sales prices for homes are likely to be less than £200 per sq. ft. then developing places with the qualities set out previously is going to be extremely challenging, particularly where there is a need to provide reasonable developer contributions and supporting infrastructure. It is well known that smaller developers simply can't compete with the volume housebuilders, who have the competitive advantage of buying power and large supply chains. However, very few of the volume housebuilders are predisposed to delivering the principles set out in this document without changing their development model, internal processes and supply chains.

There may be innovative ways of creating popular new developments by engaging with longer term investors, such as pension funds, or partnering with infrastructure providers, such as water companies, who may have a longer term incentive to invest in a project.





CAN YOU MAKE A BETTER PROFIT FROM BUILDING A GOOD PLACE?

The simple answer is yes, particularly over the life cycle of projects taking over seven years to build out, as outlined in the Prince's Foundation's report "Valuing Sustainable Urbanism".

In fact, the jury is still out as to whether the conventional housebuilding model is capable of building large new mixed-use settlements, as there are so few good built examples in reality. Applying a standard zoned development approach to larger places doesn't really work in terms of building new villages or towns, as they do not consider the place economically or socially. Therefore, one inevitably finds that the more that is built the worse the place becomes.

By building walkable neighbourhoods with a mix of uses and hierarchy of building types, the more you build the better it gets as the richness and variety of uses and sense of place and community grows over time. With this comes a greater vibrancy in the community and a better range of local amenities, employment opportunities and services.

It is therefore perhaps unsurprising that a typical housing development may offer better profits in the first phase, but doesn't tend to compound value over time, because it fails to deliver a real sense of community. Conversely good development offers better land values and housing resales over the longer term. To benefit from these enhanced long-term profits, landowners need to retain a long-term interest in the value of the land and flexibility in terms of being able to share in sales profits or land receipts in each development phase.

This flexibility does tend to favour a phased approach to development, where everyone is incentivised to create long-term value, and which is more responsive to the market at any given time. There will, however, need to be a degree of cash available upfront to deal with the initial promotion costs, compete with offers from volume builders, and enable the landowner to retain adequate control through the development process. The nature of phased development and joint venture agreement is likely to be dictated by taxation rules so it is worth considering this at the start of any negotiation.

WHAT IS THE TYPICAL LAND VALUE AND CASH FLOW PROFILE FOR DIFFERENT DEVELOPMENT TYPES?

Typical development examples comparing standard zoned housing models to the better place-making model follow. Place-making is the act of using the existing natural, social, financial and built capital as an inspiration to create public space that encourages health and well-being.



CHAPELTON, ABERDEEN

Chapelton is a greenfield development located eight miles south of Aberdeen.

Outline consent has been granted for 4,045 homes but it is likely the scheme will eventually extend to 8,000 homes.

CHAPELTON

ZeroC has just completed the first tranche of 40 units and has just begun work on its second tranche, consisting of 45 units.

The land is in the ownership of the Elsie Development Company, the development arm of the Duke of Fife.

The scheme has been master-planned by Duany Plater-Zyberk, with Brooks Murray Architects carrying out the detailed design work.

FORM OF CONTRACT:

Development agreement between ZeroC and the Elsie Development Company

START ON SITE: March 2014

NUMBER OF UNITS: 40 residential units (first phase)

GDV: £14 million



HUME SQUARE DELIVERED AS PART OF ZEROC'S FIRST PHASE

CHAPELTON, ABERDEEN

Exemplary landscaping and innovative paving contribute to the development’s distinctiveness.

Easily accessible public areas have been thoughtfully located to ensure that every home is within walking distance of green space.

Over 40% of Chapelton will be dedicated to green space, from parks and community play areas to agricultural plots and allotments.

Future phases will include a primary school, sports fields, a high street with space for a farmer’s market, retail and business facilities providing opportunities for economic development and other community amenities. In order to preserve and accentuate some of the natural aspects of Chapelton, provision has been made to include mature trees and established shrubbery.

PHASES

Chapelton will be built over multiple phases. ZeroC will shortly start constructing its second phase and has its third phase agreed in principle.

Chapelton will follow a similar model to Roussillon Park in terms of the decision to invest in the long term. Quality and careful planning will result in the increase in, or at least retention of, land and built value.

This can be seen in values achieved in Phase 1 and the predicted values in Phase 2, despite the current oil crisis affecting Scotland.

BUILD COST PER HECTARE

PHASE 1: £7,948,909 per hectare (56,716 sq. ft. of development)

PHASE 2: £10,407,642 per hectare (52,040 sq. ft. of development)

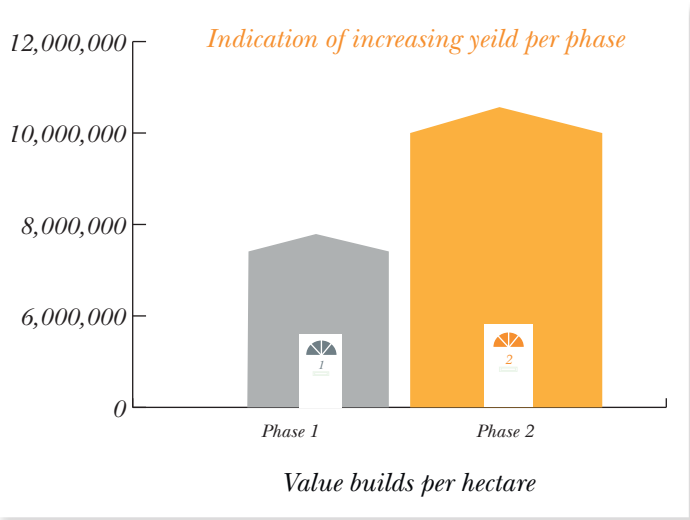
Indication of increasing yield per phase

LAND VALUE PER HECTARE

PHASE 1: £787,878

PHASE 2: £1,750,000

Indication of rising land values through phases



THE HIGH QUALITY PLOT BOUNDARY TREATMENTS CAN BE SEEN IN THE DRYSTONE WALL.





ROUSSILLON PARK, CHICHESTER, WEST SUSSEX

This scheme, designed by Ben Pentreath Ltd, consists of 254 dwellings, a community hall and a 72-bed nursing home.

The development has been highly successful with all properties to date selling off-plan.

ROUSSILLON

The nursing home was delivered by ZeroC, with Colten Care as a sub-developer, and is now operated by Colten Care.

The project has involved the phased redevelopment of an extensive military barracks in a city centre location to create a new community of distinctive character which integrates into the existing area. The distinctive architecture and extensive formal green areas within the scheme combine to reflect the heritage of the former use while creating an identity for the new neighbourhood.

The homes are constructed to Building for Life 12 standards, Lifetime Homes, Secured by Design and Code for Sustainable Homes Level 4. A range of energy solutions have been utilised to achieve Code Level 4, from district biomass heating, photovoltaics, rainwater harvesting, high levels of insulation, and waste water heat recovery.

SPECIFICATION

The high quality architecture at Roussillon Park respects the unique character and traditional values of its setting.

Great care has been taken to protect and retain some of the barracks’ original features including the magnificent flint wall, which ribbons historically around the site. This wall has been intermittently opened up to provide access to the surrounding streets.

FORM OF CONTRACT:

Development agreement between ZeroC and the HCA

START ON SITE: Summer 2011

NUMBER OF UNITS: 254 residential units, a community hall and 72-bed care home

GDV: £69 million

LOCATION

This unique development is located strategically in the historic former Roussillon Barracks site, and is just a short distance away from the town centre.

Previously home to the Royal Sussex Regiment, and the Royal Military Police, this prestigious landscape is steeped in British history. Chichester is just 90 minutes from Central London by train, and is a very short drive away from the stunning South Coast.



OTWAY ROAD PHASE 1B

ROUSSILLON PARK

The identity of the site has been retained through the sensitive rejuvenation of Georgian architecture, whilst avoiding the pastiche that has blighted many new developments. The development seeks to accommodate a rich variety of homes that reinforce the sense of place.

Exemplary landscaping and innovative paving treatments contribute to the park’s distinctiveness. Easily accessible public areas have been thoughtfully located to ensure that every home is within walking distance of green space.

PHASES

Built over five phases Roussillon Park is a place of high-quality design. The early phases establish a sense of community and transform the site into an aspirational place to live. Early establishment of landscaping as part of a high-quality public realm add to this vision. The success of this process can clearly be seen through Phases 1-4 with a steady cumulative increase in value — a clear indication of how the provision of additional infrastructure can generate a more desirable and valuable yield per hectare.

BUILD COST PER HECTARE

- PHASE 1:** £11,600,000
(62,464 sq. ft. of development)
- PHASE 2:** £12,100,000
(58,562 sq. ft. of development)
- PHASE 3:** £13,500,000
(50,647 sq. ft. of development)
- PHASE 4:** £15,400,000
(64,224 sq. ft. of development)
- PHASE 5:** £12,700,000
(53,259 sq. ft. of development)

Indication of increasing yield per phase

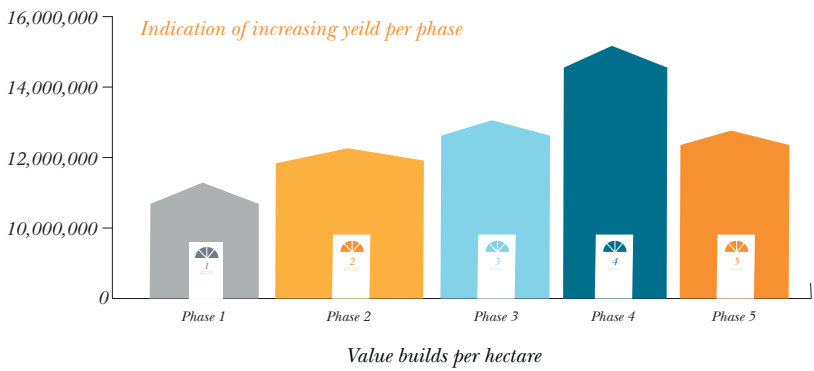
PHASE 5

Phase 5 could be construed as an anomaly. This is due to larger units and gardens, an internal road network and the delivery of the East Green. Indicatively, the lower density of housing has resulted in lower land value and achievable yield per hectare. Nevertheless, Phase 5 still represents an increase in the value of builds per hectare when compared to Phases 1 and 2. By maintaining and investing in quality over short-term yield it is clear that there are long-term monetary benefits to be achieved through increasing land value.

LAND VALUE PER HECTARE

- PHASE 1:** £1,300,000
- PHASE 2:** £1,300,000
- PHASE 3:** £2,100,000
- PHASE 4:** £1,800,000
- PHASE 5:** £1,400,000

Indication of rising land values through phases



People want to belong to a place and a community in which they have control and can take pride.





THE CORNISH CASE STUDIES

COMPARISON DATA DISTINGUISHING SALES PRICES FOR SCHEMES IN AREAS OF COMPARABLE VALUE (IN CORNWALL) WHERE INVESTMENT IN GOOD DESIGN AND PLACE-MAKING HAS AND HAS NOT OCCURRED

It is important to note that although detailed figures are held, these will not be released in this prospectus, purely in order to anonymise particular development schemes as to do otherwise might, it is felt, be discourteous.

While sales rates, as distinct from prices, do appear to be greater on the better designed schemes, it may also be the case that greater incentives are being deployed on standard schemes. These tend not to show up in the headline prices achieved. The estate agency view, however, is that this might account for an additional price differential of 1-2%.

In broad terms, the conclusion is that tangible benefit accrues to those development schemes which place an emphasis on good design and place-making and is sufficient to reward the additional investment in build cost and place-making. It may well be that factors beyond good design and place-making also play a part.

Purchasers do seem to be attracted to a culture and a philosophy which aims to build a community. Following local tradition, whether in terms of materials, language, or colour, if faithfully delivered, seems also to be popular. There is strong evidence that a Design and Community Code to uphold the aspirations and to protect against change which might undermine the whole is also greatly appreciated. Mixed uses and the early provision of social infrastructure in all its forms is valued, as is a coherent sustainability strategy. People want to belong to a place and a community in which they have control and can take pride.

These factors are above and beyond even best practice in place-making and design but they are a part of what makes a real difference in new development. They are factors designed by thought rather than by hand and eye, and in many cases they evolve through genuine and open public consultation. We are all fascinated by clever design, particularly if the ideas reveal themselves in practice over time.

THE CORNISH CASE STUDIES

DIRECT CONTEMPORANEOUS COMPARISON BETWEEN SCHEMES IN THE SAME POSTAL DISTRICT

We have been able to compare sales over a three-year period in the same market-place, during which time the introduction of Help to Buy ought to have influenced sales on the compared sites equally.

It may be the case that the pricing set by local agents for early sales on the well-designed scheme were slightly shy, and this may therefore exaggerate the improvement in value over the period. The data assembled indicates the following pattern and conclusions:

A

The improvement in average prices realised on the well-designed scheme over the period was significant. It amounted, in percentage terms, to about 20–25% over the three-year build programme. In comparison, the control site experienced negligible price growth.

C

A direct comparison in the final phase, by which time the value of good design and place-making is very evident to prospective purchasers, shows a premium on average of about £30,000 per market dwelling.

These benefits, in headline terms, very clearly justify the additional build cost in realising a well-designed scheme. Those considering this approach should, however, bear in mind some factors other than pure build costs.

On a well-designed, tenure-blind, scheme the additional net build cost of the affordable housing should be borne in mind. It may also be the case that navigating a well-designed scheme may initially take a little longer and involve a greater upfront investment. Whilst some planning authorities favour a place-making approach, a good deal of the necessary practical design can involve challenging some of the standards applying to just for example, highways, utilities, and building regulations.

Even making such allowances, the evidence is clear that the investment in good design and place-making, providing it is confidently and successfully delivered, makes very good commercial sense.

B

Sales rates were markedly different in that on the well-designed scheme only one house was not sold off-plan. What cannot be determined is the extent of incentives that were deployed on the control site to achieve sales.



THE CORNISH CASE STUDIES

COMPARISON PROVIDED BY A HOUSEBUILDER
DEVELOPING IN MULTIPLE COMPARABLE LOCATIONS
USING THE SAME HOUSE TYPES

A housebuilder with detailed knowledge of local markets is able to judge which locations over decades have proved to be broadly comparable.

In a case where such a housebuilder has delivered both standard design but also schemes where good design and place-making have been achieved, it is simple to draw comparisons based on the same basic house types about how these perform in terms of sales prices achieved.

The data covers a number of different house types in up to five different but comparable locations. It shows the following average differentials for these example house types:

THREE-BED TERRACED

Average difference compared with four other locations is £41,666 or about 18%.

FOUR-BED TWO-AND-A-HALF-STOREY

Average difference compared with two other locations is £28,000 or about 9%.

THREE-BED DETACHED

Average difference compared with four other locations is £43,666 or about 17%.

The additional build cost to achieve this increase in prices may be fairly similar in percentage terms but, because build costs in this location are roughly half the sales value, the impact of the two similar percentage increases results in an enhanced margin of somewhere in the range of between £10,000 to £20,000 per market plot. In the case of a few key buildings, (perhaps a stone or slate-hung house located so as to define and enhance a space) the specific return may be neutral in that the extra value is eclipsed by the additional build cost. But these key buildings help to add value to all the others in the vicinity.



THE CORNISH CASE STUDIES

COMPARISON OF SUBSEQUENT RESALES TAKING PLACE ON NEW-BUILD SCHEMES OVER TIME

It is now very easy to track the values achieved over time. By monitoring house sales on a development, it is simple to identify how prices fare as new development schemes mature.

This work will provide useful evidence in the years ahead but the initial findings are remarkable.

Resales on one very well-designed scheme which is being tracked is achieving an average price growth of 18% over two to three years compared with 3% on other standard schemes over the same period and in the same postal district.

There are relatively few resales making up the data so far and this element of the study will need several more years before a true pattern can be established.





WHAT ARE THE BENEFITS TO THE LANDOWNER OF MAKING A POPULAR PLACE?

HIGHER LONG-TERM STABLE LAND VALUE AND MORE HOMES

As shown in the previous examples, building popular places can deliver a better profit over the long term, and is a more sustainable and stable proposition in terms of land value, due to the enhanced benefit of building a ‘community’, not just ‘houses’.

One can also typically justify that building at a higher density means more compact and walkable settlements that has good access to both local amenities and the countryside, and which avoid inefficient land use associated with suburban sprawl. If early phases are locally popular then it is possible that further well-contained, walkable communities could be seen as favourable for future growth.

This model of greater long-term stability is particularly attractive to long-term investors, such as pension funds which are looking for safe and steady returns over a 20–50 year period through renting properties or holding good quality housing stock. This, however, should be more likely in areas of the country with faster build-out and sales rates, and where there is also a strong market for private rental where build rates can be accelerated.

LEGACY WITHIN THE COMMUNITY

The main reason often cited for NIMBY-ism in the UK is that communities associate new development with something that is poorly designed and alien to their place, and that they are rarely meaningfully engaged in the development process. Landowners who are able to show that thoughtful, high-quality development, with a good sense of local identity, is deliverable are likely to be respected by the local community for leaving a legacy for future generations and showing that not all new development has to be unpopular.

For landowners who have been part of their communities for decades, leaving a legacy is a huge driver, not just in the context of today’s housing crisis and environmental challenges, but also in opening up opportunities for the kind of development that might benefit future generations.

The process of engaging with the community and local authority early on also opens up a much more sophisticated understanding of the community’s real housing needs and desires. In many parts of the country this mix includes people either wanting to downsize to a new home, but stay in the community, or their children wanting a new affordable home that currently doesn’t exist. By engaging with wider stakeholders in any given community, employment needs are likely to be made clearer and a socio-economic profile of the area will start to take shape. This enables landowners and developers to provide the right kind of employment space at affordable rents, which helps boost the local economy, but also adds value to housing.

BETTER CERTAINTY THROUGH THE PLANNING PROCESS

The National Planning Policy Framework places such importance on thorough community consultation and the deliverability of sustainable development.

Building good-quality walkable communities is therefore much stronger politically, and more robust in terms of gaining planning consent. It is no surprise that most communities prefer good-quality development and so, if you can demonstrate you have a team capable of delivering a high-quality place, then it is important to use this to your advantage in engaging the community and local authority when competing with other sites. This approach is likely to build greater value over time, as the community can help identify useful development opportunities and assets.

A greater emphasis should therefore be placed on the benefits to the community of a viable alternative to the standard model, and support from local people, planning authorities, and politicians should be sought for this approach. When confidence is built with the local community, housing allocations can potentially grow and be seen as a more popular and attractive option than other competing housing sites that are deploying a less popular standardised model.


Once landowners establish a track record of delivering popular places, then future negotiations with local residents and authorities are on a different footing to those developers without the same credibility, and can open up significant opportunities. The challenge is resisting upfront financial incentives, and resources for the initial promotion of land, where control for what gets built and by whom will be very hard to control later on in the process.

MORE RESILIENT AND HEALTHY COMMUNITIES

The late 20th century's trend for suburban housing has led to greater negative impacts on infrastructure and energy costs, as well as carbon emissions from car travel, and contributing to higher levels of obesity from driving rather than walking. These impacts have rarely been associated with costs to the public purse, but as public spending decreases and public awareness of these issues grows, then trends and aspirations in housing can quickly change. The suburban dream of the 1960s is rapidly being replaced with a return to urban living and a desire for more efficient and sociable lifestyles.

Building good places can therefore promote healthy communities, sustainable lifestyles and resilience to mitigate against the future effects of energy costs and climate change. The flexibility and mix of housing types and employment uses is also more resilient to changing economic conditions and can adapt to changing circumstances in a way that standard housing estates and zoned development cannot. The standard model typically targets a much narrower demographic group and has inflexible building forms and types that cannot be easily adapted for other uses over time. This makes it inherently less resilient than a wider demographic spectrum and more flexible building types.





This initiative aims to steadily grow a network of like-minded landowners, developers, and consultants with a track record of delivery.

WHO DO YOU NEED TO ENGAGE TO PLAN, DESIGN AND DEVELOP A BETTER PLACE?

AN EXPERIENCED DEVELOPER AND PLANNING SPECIALIST WITH A TRACK RECORD IN DELIVERY

Key to getting better places built is engaging at the onset with an experienced developer, planning specialist, and often a prudent tax adviser, who genuinely understand how to value mixed-use developments, and have evidence of similar projects they have worked on where a premium has been obtained.

The majority of land agents and developers do not have hands-on experience in this field and so apply standardised models and valuation techniques that don't account for the potential uplift that comes from valuing a better place, diverse local amenities and a strong sense of community. This might require research to see what track record for delivery different developers and other advisers have, in order to come to an informed decision on who to appoint.

Volume housebuilders are constrained by short-term profit targets for their shareholders and are targeting a specific type of buyer within a narrow demographic. For this reason, valuing good urban design, higher density housing types and a range of mixed uses does not fit their investment and valuation model. Given that volume housebuilders account for roughly 80% of the housing market, and are content with their existing model, it is not surprising that professionals who genuinely understand the good development model are few and far between.

Those who deliver higher quality development are currently pioneers; it is fair to say that the evidence base is still being gathered for good mixed-use development. Subsequently, some landowners and developers are not willing to share their actual build costs and profit margins publicly.

For this reason, assembling a network of developers, landowners and tax advisers who are currently engaged in good development is critical in encouraging other landowners to follow their lead and learn from their successes and mistakes. It is important to recognise that even if a good team is assembled, it only requires one 'weak link in the chain' to cause failure and so, making sure to examine previous work and get the right references is important.

This initiative aims to steadily grow a network of like-minded landowners, developers and consultants with a track record of delivery.

A CONSORTIUM OF SMALL TO MEDIUM SIZED DEVELOPER/BUILDERS

It is likely that small to medium size developers, who can come together as a consortium are more likely to have sufficient flexibility in their business model and a sense of shared responsibility to develop mixed-use communities.

It is suggested that engaging one or two housebuilders who have some experience in this field and then adding one or two local builders to learn the model and bring their local building knowledge is a good way assemble the right development team.

To get the right quality, it is also important to understand supply chains and not only scrutinise the quality of building components early on, but also see if there are local businesses that can provide elements of the project. Rather than seeking short-term apprenticeships as a way to gain popular support, a more meaningful way of engaging with a community is to seek out local businesses to produce and supply building components or skills. In this way, companies can grow on the back of a project and enhance the local economy.

POLITICAL AND COMMUNITY SUPPORT

The early engagement of senior local authority members, councillors and community representatives is critical to communicating the fundamental difference between good development and the standard model. There is a great deal of mistrust in the current development model, which promises the earth but delivers much less, and so it is important that local planning and politics recognises the difference between these development models and their ability to deliver what they promise. Development is often more popular when local people are employed in building it and feel proud of their work.

FUNDING OPTIONS FOR INFRASTRUCTURE DELIVERY

Finding ways to finance early transport and utility infrastructure is often one of the challenges for a large development and there are a number of options to consider:

- 1 LANDOWNERS CAN FORWARD FUND INFRASTRUCTURE THEMSELVES;
- 2 DEVELOPERS CAN FUND INFRASTRUCTURE IN PHASES;
- 3 THE GOVERNMENT CAN HELP WITH INFRASTRUCTURE LOANS DEPENDING ON THE SCALE OF DEVELOPMENT;
- 4 DEVELOPERS CAN ENTER INTO CREATIVE AGREEMENTS WITH INFRASTRUCTURE PROVIDERS TO HELP FUND UPFRONT COSTS IN RETURN FOR SAVINGS OR INCOME LATER ON. WATER AND DRAINAGE SYSTEMS ARE A PARTICULAR AREA IN WHICH THIS KIND OF APPROACH IS WORTH EXPLORING.



OPTIONS FOR STRUCTURING A LAND DEAL

Two of the principal options for structuring a land deal are:

- **CONSORTIUM AGREEMENT:** the landowner enters into an agreement with the selected developers to act with the landowner as a consortium for a specified period. The site as a whole is master-planned and promoted by the consortium as an estate development, with the developers in turn being transferred phases and constructing upon the grant of the detailed planning permissions. The developers then sell and transfer the houses directly to the buyers.
- **DEVELOPMENT AGREEMENT:** the landowner enters into an agreement or a series of agreements with the selected developer(s) for the phases of the site to be constructed under licence, with the land retained by the landowner. The landowner masterplans the site and the agreements may be either conditional on the grant of planning permission or entered into upon the grant of planning permission. The developer(s) sell(s) the houses and on completion direct(s) the landowner to transfer the houses to the buyers.

There are common features:

1 COMMON ASPIRATION - This sets out the parties' aspiration and objective of delivering the development in a way that:

- establishes the highest design sustainability and community standards;
- preserves and enhances the reputation of the promoters/the estate; and
- maximises development value in this context.

2 DEVELOPMENT SPECIFICATION - this comprises the planning permissions and specifications as approved by the landowner that define in detail the design and works. The particular matters covered are: external design and layout; external materials; and sustainable features. The specification may also cover 'working drawings'.

3 INFRASTRUCTURE/PLANNING OBLIGATIONS - site-wide and specific to a phase: the agreements provide for delivery of both the site-wide and the phase-specific infrastructure by the agreed party and the allocation of responsibility for compliance with planning conditions and obligations including construction of facilities/making payments under planning agreements. The parties' respective obligations are reflected in the pricing provisions for the land.



OPTIONS FOR STRUCTURING A LAND DEAL

4. **LEGAL STRUCTURE - CONSTRUCTION:** this is to ensure delivery of the development in accordance with the common aspiration and the development specification. In particular:
- **CONSORTIUM AGREEMENT:** provisions for each developer to abide by the consortium terms acting through an executive committee and for expulsion of a defaulting developer from the consortium.
 - **DEVELOPMENT AGREEMENT:** provisions for the landowner to certify completion of houses and relevant infrastructure before the developer(s) may direct the landowner to transfer the houses to the buyer (or the developer(s)); additionally termination provisions for developer default.
5. **LEGAL STRUCTURE - THE ESTATE:** this is to ensure the protection and enhancement of the completed development. In particular:
- **MANAGEMENT COMPANY:** a company of which the landowner, developers and houseowners are members with the landowner having special ‘stewardship rights’. The company procures the provision of services and works for the estate/phases and the members pay the related service charge.
 - **ESTATE SCHEME:** a set of provisions referring to a specific Design and Community Code to regulate design and alterations and other community matters. These are set up as legal obligations binding all houseowners and are enforceable by the landowner, the consortium, the owners and the management company.



OPTIONS FOR STRUCTURING A LAND DEAL

6. PRACTICAL POINTS FOR CONSIDERATION BETWEEN LANDOWNERS AND DEVELOPERS:

- Certification as to completion of houses/infrastructure: the landowner at its discretion or acting reasonably.
- Imposition of a timescale on the developer for completing houses/infrastructure — particularly in relation to phased developments and where part of the consideration from the developer is the construction of:
 - Affordable housing to meet site-wide planning agreement targets;
 - Housing for the landowner;
 - Investment properties for the landowner e.g. retail/office units; but to have regard to market conditions.
- Design and Community Code: prepared and varied by the landowner at its discretion or acting reasonably or with input from the developer(s).
- Design and Community Code: grant of consents: the landowner at its discretion or acting reasonably or with input from the developer(s).
- Design and Community Code: restrictions as to business use/short-term lettings of houses: the landowner and the developer will want to consider the level of restriction in the context of preserving estate amenity yet allowing flexibility to house owners. Council of Mortgage Lenders' requirements as to marketability apply.
- No disposals of phases/development agreement until completion of houses/infrastructure other than by funder exercising power of sale upon developer default.
- Funding and mortgaging of phases/development agreements: the landowner may enter into direct agreement with the developer and its funder providing for step-in rights but landowner to have control over identity of step-in developer.
- Developer to grant the landowner licence to use all design material in respect of the development.





AN INCLUSIVE APPROACH TO PLANNING

An essential part of the planning process is getting local communities, local councillors and local planners all on board.

This is best achieved through engaging in a community planning process like Enquiry by Design, or holding design charrettes.

These are well-managed, inclusive design processes where design options are tested by being drawn, with local stakeholders invited to take part at dedicated times during the process. If these processes are well run, this is more likely to lead to a feeling of trust and commitment to certain key principles, and is very useful for the design team in terms of listening to any concerns and understanding what matters most to local people.

To ensure that the trust built up extends into delivery, it is important to have control over the developer so that what has been agreed with the local community actually gets built. This would normally be achieved through the adoption, at outline planning stage and as part of the Section 106 agreement, of a design code, or even better, through controls built in through title on the land. Either method would involve stipulating a level of design and build quality and sign-off at key design stages, which can be more easily negotiated and efficiently delivered via a consortium model.

If this kind of control can be demonstrated to key stakeholders then greater trust and a competitive advantage can be built up over other developers in the area, who are unable to provide such assurances to the community.





MAINTAINING QUALITY AND VALUE OVER THE LIFE OF THE PROJECT

On larger projects, where value is being enhanced over time, it is critical that the original intent and quality of build is maintained, if not enhanced, over time.

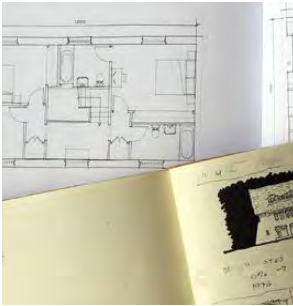
It is usually the case that a lot is learned in the early phases about the local market and how to adjust the agreed vision to achieve the optimum balance between place-making, design quality and early profit.

It is therefore important to employ a town architect or development manager with design back-up to monitor construction quality or form a developer consortium with agreed design principles.

The relationships built up on-site, and discussions about how certain building details and techniques could be altered to improve them and get greater efficiency, are an important part of the development process. Working towards a robust and simple hierarchy of architectural details is something that evolves over the life of the project so regular reviews and updates of details and documents are critical. Once the architect, technical office, site manager and builders understand each other there is better build quality and a much simpler construction process. It is a good idea to establish a catalogue of building elements and correct details early on in a project. Ideally the party can then build three sample panels of 'simple, medium and grand' critical details, so that anyone new to the site can get an immediate induction into correct detailing and build quality.

LAND TITLE AND COVENANTS

The most secure way to ensure a vision is realised is to retain title or covenant over the land, while the developer is building out, and to transfer the freehold on a phase of building only when it has been built out as per the design code and detailed design drawings.



In this model, the landowner may also want to insist on the retention of an overall master-planner to adjust the layout of each phase, depending upon market conditions, and have a list of approved architects that developers have to use for particular phases. It is wise in each phase to have one coordinating architect working with one or two other architects to ensure a healthy level of diversity in the design but keeping tight overall design control. Good design is almost always achieved by having overall harmony, with a healthy degree of diversity for visual interest and market choice. This might not always be workable, in which case a Common Aspiration form of contract works so that the landowner can retain control, but allows developers to own the freehold and thus secure the loans required to build out their phase.

DESIGN CODES

Coding development at outline planning stage is essential to ensure that all of the phases of development come together to form a coherent whole. It is possible to have a coding process that also sets out the requirements for detailed codes that have to be prepared for each distinct phase of development, in order to speed up the granting of reserved matters consent. This is attractive on larger developments as developers can agree standards and design solutions which once they have been approved in a detailed code, can then be rolled out in principle for future phases. This allows for greater certainty in planning and for supply chains to be set up based on a good understanding of future demand.

However, it should be noted that if a landowner relinquishes control to a developer, with only the planning system and design code as quality control, then this is nowhere near as powerful as titles or covenants on the land to the point of freehold transfer. It is relatively easy for developers to resubmit planning and dilute design codes, particularly in areas where there is political pressure to deliver houses and where a planning officer’s recommendation may count for little in the view of local councillors. Developers may also sell parcels of land on with no control, which almost always causes poor place-making and poor quality.





CONCLUSION

The UK is entering one of the largest building booms in its history at a time when 80% of new homes are delivered by volume homebuilders with standardised delivery models and short-term investment cycles.

This model tends to deliver a standardised product and will simply not build the conservation areas of tomorrow. Whilst these developers may already have amassed large land banks and have existing option agreements with landowners, the ultimate decision between good and poor development lies with the landowner.

The incentives of large sums of money upfront and quick returns far too often prevail against the challenges involved in building good developments, where better long-term profits, good build quality and a healthy mix of uses will make beautiful places fit for future generations.

The aim of this prospectus is to point out that ultimate control for good development lies with the landowners; to encourage them to think carefully about land disposal, and realise that making a healthy profit and leaving a lasting built legacy is more important than it has ever been. To make the choice easier The Prince's Foundation for Building Community has clearly set out some of the issues and solutions, and are building a network of institutions and practitioners experienced in this field to help with advice, education or delivery.



LANDOWNER STATEMENTS

TORNAGRAIN

The concept of a new town near Inverness arose as a result of the rapid growth of the city in the late C20th and the spread of disconnected housing developments ever further from the traditional urban core.

In 2002 the Highland Council approached Moray Estates, as a large local landowner, to help address issues concerning urban sprawl around Inverness and from this initial liaison the concept of a new town arose.

Inspired by the Moray family's historic success in developing the area centred on Moray Place in Edinburgh's New Town the estate resolved to create something special adjacent to the hamlet of Tornagrain six miles to the east of the city. In recognition of the many fine examples of urbanism in Scotland's traditional towns and villages we resolved to identify the 'best of the past', adapt it and apply it in an innovative way to the present.

While on a study tour of the United States in 2005 we were introduced to the work of Andres Duany and DPZ. To us new urbanism provided the perfect design, planning and delivery template for our objectives and, in addition, the success of Poundbury closer to home demonstrated that the implementation of such a vision was feasible.

In 2006, using the services of DPZ, we hosted the UK's first Charrette which was attended by over 600 people and was largely successful in conveying the concept of a new town and making it acceptable to the local community, politicians and public service providers.

Shortly after this the Scottish government endorsed the project by making it an exemplar of its Scottish Sustainable Communities Initiative and in 2012 we were finally given outline consent for the construction of 5,000 homes.

From the time of the Charrette onwards we formulated a Design Code to guide the mix of uses within the town and the design quality to which housebuilders are obliged to adhere. To ensure the character and quality of the town are not eroded with the passage of time a Conservation Trust has been established by which the estate and members of the community will ensure that the Code is enforced on an on going basis.

In June this year work commenced on the first house and last week was very special as I stepped through a Tornagrain doorway for the first time. In common with many new town projects the vision is very long term, perhaps 40 years, so the last time I leave a Tornagrain threshold will either be with the help of a zimmer frame or in a coffin.

Progress of over the last fourteen years has at times been agonisingly slow and expenses have become ever greater; however it has also been hugely rewarding in many different ways, especially now construction has begun.

While the overriding objective for Tornagrain has always been to provide its inhabitants with a good quality of life I will be delighted if the result of our endeavours is an enduring legacy of which my family and the many people who have contributed to the vision can feel proud.

Moray Estates



LANDOWNER STATEMENTS

ROMSEY

Ashfield Estate runs between Romsey and North Baddesley in Hampshire, and is a collection of seven farms on the edge of a larger estate. It has been cherished, championed and safeguarded for generations.

Years ago PLC housebuilders suggested some of the land should be promoted for development. The Estate shied away, saddened by the wrong turns taken by so many English towns. Years passed but the pressure for growth in Test Valley didn't, nor did the Estate's scepticism of the motivations or capabilities of PLC housebuilders.

Eventually the Borough Council asked all local people and businesses to participate in the process of deciding where and how to allow development. To support that decision, the Estate asked The Prince's Foundation For Building Community to run a four-day Enquiry by Design (EbD) in Romsey Town Hall in 2008. Slowly designs for urban extensions of Romsey and North Baddesley evolved.

Using the experience and know-how of the Duchy of Cornwall, the Estate formed a consortium of three trusted housebuilders from nearby parts of southern England. The Estate joined with them to form the Ashfield Partnership. We were all determined that the good intentions of the local community, expressed through the EbD, would not be thwarted by a process where control was ceded to outsiders who had not been part of the early planning.

With the consortium in place, the Estate could guarantee that what was going to be delivered kept faith with the early promise. That meant remaining involved in the project at each and every stage to ensure delivery of what had been planned from the outset.

A key driver was the firm belief that the enlarged community would have the opportunity to enjoy and benefit from the green hinterland of the undeveloped part of the Estate. The goal was and is to harness local food production to the demand from a newly enlarged community.

The Ashfield Partnership is relying on the marketplace savviness and hard-won experience of its developers. It is this combination that allows us the confidence to challenge the agencies whose actions and mindsets undermine the chances of great place making.

The Estate has endured years of delay but has never wavered from its belief that by sticking to its guns, selecting partners with similar values, being guided by local knowledge, and staying involved for the long run, it will avoid the commoditisation of its most unique and prized asset, its land, for its ultimate master – the local community.

We are building places that offer membership of that community, places with a sense of identity as well as history. If we get that right, all else will follow: land values, civic values, a place we can be proud to call home.

Timothy Knatchbull



LANDOWNER STATEMENTS

THE DUCHY OF CORNWALL

I have been lucky enough to work for the Duchy of Cornwall most of my life. I was in the minibus all those years ago when His Royal Highness was shown one of the housing estates that the Duchy had allowed to happen without thinking about it. The discussion that followed made such an impact on me at a young age that I have been thinking about it ever since!

The Duke of Cornwall has either taught me all I know or presented me with the challenges and opportunities to learn how to bring about what I now call popular development. The rubric here may seem complex yet the key is about being always prepared to learn and yet recognising, on analysis, that common sense is at the heart of our endeavours. If it looks effortless and is legible then it probably feels right.

If we can make places that really work for communities then an enduring social dividend transcends other objectives. If we can make development popular again to its neighbours then how much easier it would be to meet our housing needs. If we can spread the warmth of development locally so that tangible benefits accrue then new development will not be so feared and resisted. If we can reinforce local identity through Pattern Books and Building Codes, by interpreting the correct dialect of design, and in the use of materials we may find that our schemes are embraced. If we can make the conservation areas of the future sufficiently proofed to be sustainable then the legacy will be much greater than the effort. And if we can secure the delivery so that the result matches or exceeds expectations then we can build not only great places but also renewed trust in what housing development means.

These principles have evolved from experience with a large number of Duchy schemes including Poundbury. They share their origin in genuine open dialogue with communities facing development pressure so as to shape master plans and principles. The most effective is the Enquiry by Design model created by the Prince's Foundation but, in my opinion, genuine public consultation always adds value.

I am really interested to see how others are interpreting this philosophy in the movement. Sharing information and experience is of practical help but it is also about building confidence in breaking convention. Landowners are critical here since it can be a lonely path when challenging the prescribed formula evolved since the Second World War by the planning and housebuilding industry and woven into a Gordian knot by the battalions of standardisers who have somehow won the power to regulate.



LANDOWNER STATEMENTS

THE DUCHY OF CORNWALL

So too are the brave builders critical in being prepared to devote the time and energy to help us deliver our dreams. It would not be possible without their acumen, practical knowledge, and investment. I do also sense a growing interest on the part of some planners and members of local authorities and this is another area where the sharing of information could be really valuable. I hope that policy may change if we can together deliver enough exemplars to demonstrate that there is an alternative.

My knowledge has been enriched and broadened in particular by observing at close quarters how proposals are emerging at Romsey. Tim Knatchbull has bravely pioneered and led an approach with his Ashfield Partnership so completely at odds with convention that I suspect both the planners and the townspeople of Romsey will be pinching themselves in disbelief when building starts shortly.

The original dilemma at Poundbury was whether or not great place-making and design would create value. As tempting as it may be for the fingers crossed at the time to offer a different gesture, now the added value question remains central to all that we are doing together. For the Duchy it was also reputational in that, without having demonstrable commercial integrity, there was no replicable exemplar.

Every scheme faces different challenges and opportunities but I am convinced that as we share knowledge we can also grow in confidence that the development husbandry approach, while creating all sorts of broader abstract value, really does also make financial common sense.

Tim Gray

JULY 2016



*'The only thing you take with you when
you're gone is what you leave behind'*

JOHN ALLSTON

NOTES

We would like to thank everybody who contributed to this prospectus, especially Charles Anderson, Tim Gray, Hugh Petter, Kim Slowe, Ashley Wheaton and his team at UCEM.

We would also like to thank all those who gave their time to attend the seminar on the 21st July 2016.

We are grateful to them all.

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