



To: The Members of the **Thames Basin Heaths Joint Strategic Partnership Board**

A meeting of the **Thames Basin Heaths Joint Strategic Partnership Board** will be held at Council Chamber, Surrey Heath House, Knoll Road, Camberley, GU15 3HD on **Friday, 21 September 2018 at 10.00 am**. The agenda will be set out as below.

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<b>AGENDA</b>		<b>Pages</b>
<b>1</b>	<b>Apologies for Absence</b>	
<b>2</b>	<b>Minutes of Previous Meeting</b>	<b>1 - 6</b>
	To receive the minutes of the meeting of the Thames Basin Heaths Joint Strategic Partnership Board held on 20 <sup>th</sup> April 2018.	
<b>3</b>	<b>Investment of Thames Basin Heaths Endowment Fund</b>	
	<b>a Investment Working Group Update</b>	
	To receive an update on the work taking place to ensure that the best returns are obtained from the Thames Basin Heaths Endowment Fund.	
	<b>b Independent Financial Advisor Presentation</b>	
	To receive a presentation from the independent financial advisor Arlingclose on what might be done to maximise the endowment fund.	
<b>4</b>	<b>Financial Update</b>	<b>7 - 16</b>
	To receive a report setting out the current financial position of the Thames Basin Heaths Partnership.	
<b>5</b>	<b>Strategic Asset Management Monitoring Project Update</b>	<b>17 - 24</b>
	To receive an update on the work of the Strategic Asset Management Monitoring project.	
<b>6</b>	<b>The Role of Suitable Alternative Natural Green Space in Protecting High Value Wildlife Sites</b>	<b>25 - 32</b>
	To receive a report summarising the role of SANGS in protecting wildlife sites.	
<b>7</b>	<b>Any Other Business</b>	
<b>8</b>	<b>Dates of Future Meetings</b>	

**Partnership Board Committee Members:**

Councillor Moira Gibson, Surrey Heath Borough Council (Chairman)  
Councillor Brian Adams, Waverley Borough Council  
Councillor Richard Billington, Guildford Borough Council  
Councillor Graham Chrystie, Woking Borough Council  
Councillor Graham Cockarill, Hart Borough Council  
Councillor John Edwards, Surrey County Council  
Councillor Jonathan Glen, Hampshire County Council  
Councillor Mike Goodman, Surrey County Council  
Councillor David Hilton, Royal Borough of Windsor and Maidenhead  
Councillor Barbara Hurst, Rushmoor Borough Council  
Councillor Gail Kingerley, Runnymede Borough Council  
Councillor David Parr, Runnymede Borough Council  
Councillor James Radley, Hart Borough Council  
Councillor Karen Randolph, Elmbridge Borough Council  
Councillor Angus Ross, Wokingham Borough Council  
Councillor Martin Tennant, Rushmoor Borough Council  
Councillor Chris Turrell, Bracknell Forest Borough Council

**Advisory Members:**

Ken Anckorn, Surrey Wildlife Trust  
Sarah Bunce, Natural England  
Sam Cartwright, Berkshire, Buckinghamshire and Oxford Wildlife Trust  
Clive Chatters, Hampshire and Isle of Wight Wildlife Trust  
Ann Conquest, Natural England  
James Dawkins, RSPB  
Matthew Jackson, Berkshire, Buckinghamshire & Oxfordshire Wildlife Trust  
Tina Lamour, RSPB  
Heather Lewis, Surrey Wildlife Trust  
Miranda Petty, Natural England  
Heather Richards, RSPB  
Andrew Smith, Natural England  
Marc Turner, Natural England

**Officers:**

Ernest Amoako, Woking Borough Council  
Cheryl Brunton, Runnymede Borough Council  
Simon Cridland, Bracknell Forest Borough Council  
Paul Druce, Surrey County Council  
Richard Ford, Runnymede Borough Council  
Andy Glencross, Wokingham Borough Council  
Julie Gil, Bracknell Forest Borough Council  
Daniel Hawes, Hart Borough Council  
Jane Ireland, Surrey Heath Borough Council  
Judith Jenkins, Elmbridge Borough Council  
Dan Knowles, Guildford Borough Council  
Helena Merriott, Elmbridge Borough Council  
Hilary Oliver, Royal Borough of Windsor and Maidenhead  
Graham Parrott, Waverley Borough Council  
Louise Piper, Rushmoor Borough Council  
Wai Po Poon, Woking Borough Council  
Jenny Rickard, Surrey Heath Borough Council  
Robert Sarfas, Hampshire County Council  
John Thorne, Rushmoor Borough Council  
Gayle Wootton, Waverley Borough Council

**Minutes of a Meeting of the Thames Basin Heaths Joint Strategic Partnership Board  
20 April 2018**

**Present:** Councillor Moira Gibson, Surrey Heath Borough Council (Chairman)  
Councillor Jonathan Glen, Hampshire County Council  
Councillor Mike Goodman, Surrey County Council  
Councillor Angus Ross, Wokingham Borough Council  
Councillor Chris Turrell, Bracknell Forest Borough Council

**In Attendance:** Sarah Bunce, Natural England  
Anne Conquest, Natural England  
Paul Druce, Surrey County Council  
Julie Gil, Bracknell Forest Borough Council  
Daniel Hawes, Hart Borough Council  
Jane Ireland, Surrey Heath Borough Council  
Dan Knowles, Guildford Borough Council  
Helena Merriott, Elbridge Borough Council  
Heather Richards, RSPB  
Robert Sarfas, Hampshire County Council  
Andrew Smith, Natural England  
John Thorne, Rushmoor Borough Council  
Marc Turner, Natural England  
Jennifer Wadham, Hampshire County Council

**Apologies:** Councillor Karen Randolph, Elmbridge Borough Council  
Councillor James Radley, Hart Borough Council  
Councillor Graham Cockarill, Hart Borough Council  
Councillor David Parr, Runnymede Borough Council  
Councillor Graham Chrystie, Woking Borough Council

**8 Minutes of Previous Meeting**

**RESOLVED** that the minutes of the meeting of the Thames Basin Heath Joint Strategic Partnership Board held on 7<sup>th</sup> December 2017 be approved as a correct record.

It was noted that Sarah Bunce, not Katie Breach, who had represented Natural England at the meeting.

**9 Investment Strategy Working Group Update**

The Board received a report setting out a proposed way forward for the investment of the funds held in the Thames Basin Heaths Endowment Fund in order to ensure that the best returns were obtained for the money held by the Partnership in the years to come.

It was noted that the balance held in the Endowment Fund currently received interest at the rate of 0.25% per annum. Under the terms of the Strategic Access Management and Monitoring (SAMM) agreement the Board had a responsibility to review the value and performance of the Endowment Fund on a regular basis and provide direction to the

Administering Body (Currently Hampshire County Council) as to when, how and from whom the services of an Independent Financial Advisor was to be procured.

A Working Group had held discussions with the Board's finance officers and proposals for an investment strategy had been developed. It was proposed that a conservative approach that enabled investments to generate sufficient income to cover ongoing costs be adopted by the Board and the following strategy was proposed:

- i. Approximately £1million should be kept in cash in the Maintenance Account to fund projected expenditure for a period of two years.
- ii. The primary aim of any investments would be to generate income, rather than capital growth
- iii. Investments should be subject to the lowest risk possible to achieve investment return and should not be susceptible to big fluctuations.
- iv. A target rate of return on investment should be calculated using the current balance held in the Endowment Account plus a reasonable assumption of future income to give a target percentage rate of return required to meet projected costs in perpetuity.
- v. The IFA would be asked to advise on a recommended mix of investment types
- vi. It would be acknowledged by the Board that the target rate of return would vary depending on actual income and expenditure and that the target percentage rate of return may not be achieved.

It was agreed that the Investment Strategy and investments would be formally reviewed by the Board on an annual basis.

It had been acknowledged that additional expertise would be required to ensure that any investments were appropriate and met the Board's proposed aims and objectives. It was agreed that the Working Group would work with the Partnership's Financial Officers to identify a suitable Independent Financial Advisor.

#### **Agreed Actions:**

- i. That the proposed investment strategy be adopted**
- ii. Partner Authorities forward details of their Council's financial advisors to the Working Group.**
- iii. The Working Group identifies and recommends to the Board an appropriate Independent Financial Advisor.**

## **10 Wealdon Judgement: Natural England Response and Future Advice**

Mark Turner, Natural England, gave a presentation in respect of the advice being provided by Natural England in relation to air pollution following the Wealdon Judgement.

Following the 2017 judicial review, Natural England had drawn up guidance that local authorities could use to ascertain assessment requirements to measure the impact of developments on air quality as part of the Local Plan process. The guidance, which covered emissions from road traffic and the impact that these had on local ecology had been developed to provide officers with a user friendly step wise process that could be used to determine the level and type of assessment required. It was stressed that none of the thresholds referenced in previous literature had been changed and a measurement of 1% of Critical Load/Level; 200m from the N<sub>2</sub>K site; 1,000 average vehicular movements per day (AADT) was still to be used during the assessment process.



- Adjusting the Strategic Solution rules
- Weighting SAMM contributions differently for example a local authority contributes less to the SAMM fund whilst increasing the amount of land they make available for SANGs
- Fencing off the SPA
- Developing a more strategic approach to parking at SANGS sites
- Making use of Dog Control Orders
- Working with the Forest Commission and the Crown Estate to open up more land

It was reported that the Planning and Land Management Teams had met with Highways England to discuss the proposed improvements to the M25-M3 interchange and the environmental impacts that the improvements would have on the surrounding SPA. It had been made clear that Highways England would need to take into account both air pollution and compensatory land as well. Highways England had subsequently indicated that they had identified land to replace that lost however to date no further details had been given.

Arising from Members' questions and comments the following points were noted:

- It was essential that a holistic approach was taken towards the future delivery of SANGs and that a flexible approach was developed.
- Changing the calculation used to determine how much SANG should be provided as part of a development agreement could open local authorities up to significant levels of challenge from developers who had already provided SANS.
- Whilst anecdotal evidence suggested that SANGS worked it was essential that a robust evidence base was developed to support this.
- The obligation placed on local authorities to revisit their Strategic Housing Needs Assessments every five years would impact on future SANGS provision.

It was agreed that a more in-depth discussion on the future of SANG provision would be held at a later Board meeting.

## **12 Strategic Access Management and Monitoring Project Update**

The Board received a report providing an update on the Strategic Access Management and Monitoring (SAMM) Project. The report summarised the projects activities and achievements since the Board's last meeting and included updates on staffing and recruitment, warden activity, SANG Visitor surveys, access to SPA land, educational work and monitoring activities.

Key highlights included:

- The successful recruitment of 7 new seasonal wardens bringing the number of full time equivalent wardens working on the project to 6.
- The delivery of 5,978 hours of wardening activity during 2017.
- The introduction of iPads to collect visitor feedback during the 2017 Winter SANG Surveys. As part of this work 7 full SANG surveys (each consisting of 18 hours of interviews) were completed in the eight week period up to March 2018.
- The completion of an agreement with the Ministry of Defence to enable SAMM project wardens access to the military training estate on the SPA area. This was the first agreement of its kind in the Country and the SAMM Team was now working with the Defence Infrastructure Team to successfully implement the agreement on the ground.

- The website continued to receive positive feedback. To ensure that the website was kept relevant and accessible, work was taking place to review and expand its content to include a calendar of events, downloadable resources and a dedicated page to publicise the Heathland Hounds initiative.
- Links were being developed with South Down National Park.
- Work was taking place to develop a more robust data set in relation to visitor numbers.
- In order to expand the educational offer available it was proposed that an Education Officer be employed. If approved the appointment would run to the end of the 2019/20 financial year. Full time salary costs would be in the region of £32,700 per annum.

It was agreed that details of events and activities that the SAMM Team were involved with would be circulated to the Board so that members could attend and learn more about the project.

The Board commended the SAMM Team for their successful completion of the agreement to enable access to MOD Land.

**RESOLVED** that the appointment of an Education Officer be progressed.

### **13 Financial Report**

The Board received a report setting out the current financial position of the Thames Basin Heaths Strategic Access and Monitoring (SAMM) project.

It was noted that as at 31<sup>st</sup> March 2018, the balance in the Endowment Fund was £4.387million. A further £797,868 was held in the Maintenance Fund to pay for project expenditure. Projections showed that a further £2.44million would be added to the Endowment Fund in the 2017/18 financial year giving an anticipated total of £6.831million available to be invested.

The Board noted the current financial position.

The Board noted that Jenny Wadham would be taking up a new role within Hampshire County Council and financial advice would be given by Robert Sarfas for the next twelve months. The Board thanked Jenny Wadham for the help and support that she had given the SAMM project.

### **14 Any Other Business**

The Board noted that Jane Ireland would be retiring at the end of the month. The Board thanked her for all the work that she had done to support the partnership and wished her well in the future.

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<b>Committee/Panel:</b>	Thames Basin Heaths Joint Strategic Partnership Board
<b>Date:</b>	21 <sup>st</sup> September 2018
<b>Title:</b>	Thames Basin Heaths Financial Statement
<b>Report From:</b>	Administrative Body

**Contact name:** Rob Sarfas, Principal Accountant, Hampshire County Council

**Tel:** 01962 846290

**Email:** [rob.sarfas@hants.gov.uk](mailto:rob.sarfas@hants.gov.uk)

## 1. Executive Summary

- 1.1 This report presents an update to the Joint Strategic Partnership Board (JSPB) on the financial position of the Thames Basin Heaths Strategic Access Management and Monitoring (SAMM).
- 1.2 The report includes the actual financial position at the 31<sup>st</sup> March 2018 and the projected financial position for the three years to 31<sup>st</sup> March 2021 to help assist the Board in making their decision on whether financial advisors should now be appointed to invest some or all of the funds held within the Endowment Fund. This is covered elsewhere on the agenda for this meeting.
- 1.3 As at 31<sup>st</sup> March 2018 the balance in the Endowment Fund was £7.129m and a further £1.466m was held in the Maintenance Fund to pay for project expenditure. It is projected that a further £1.431m will be added to Endowment Fund in the 2018/19 financial year, giving an anticipated total of £8.560m available to be invested.
- 1.4 Based on current projections of income and expenditure, the balance on the Endowment Fund would increase to £10.494m by 31<sup>st</sup> March 2021. Meanwhile the balance on the Maintenance Fund is expected to decrease to £1.426m by 31<sup>st</sup> March 2021 as increasing costs are set against a projected reduction in income.

## 2. Financial Position 2018/19

- 2.1. The financial position as at 31<sup>st</sup> March 2018 is summarised in the table in Appendix 1, with the projections for the current financial year to 31<sup>st</sup> March 2019 in Appendix 2. A more detailed summary of the projected income for the year to 31<sup>st</sup> March 2019 is shown in Appendix 3.
- 2.2. The balance in the Endowment Fund at the end of March 2018 was £7.129m, and it is projected that a further £1.431m will be added to the Endowment Fund in the 2018/19 financial year, giving a balance of £8.560m at the end of March 2019.

- 2.3. This is based upon projected total income receivable in 2018/19 of approximately £2.044m, to add to the £10.445m total income received by the Administrative Body to 31<sup>st</sup> March 2018. This income is split between the Endowment and Maintenance funds. Costs of £1,849,405 had been incurred to March 2018, with further costs of £478,000 projected for the 2018/19 financial year.
- 2.4. The projected income for the 2018/19 financial year of £2.044m is an increase on the £1.677m reported at the previous JSPB meeting. This is primarily due to increased projections for Bracknell Forest and Surrey Heath Borough Councils, with the forecast income for these two authorities now £280,000 and £50,000 higher respectively than the original budgeted levels.
- 2.5. The projected costs for 2018/19 have increased by £21,000 since the previous JSPB meeting to £478,000. The increase consists of £11,500 additional staff costs and £9,500 additional project costs.

#### Staff Costs

The Board was previously notified of an increase to staffing costs relating to an increase in seasonal staff costs, and this has now been included in the figures (£13,500). In addition, the new Education Officer is forecast to start at the beginning of November and the additional cost of £12,500 is also now included in the forecast. These increases are offset by vacancy savings from a Warden post (£13,500) and the Communication & Education Officer post (£11,000). Two seasonal wardens left at the end of July generating a further vacancy saving of £5,500.

The cost of Skyguard lone worker personal safety devices and associated service charges was previously reported against project costs and has now been moved to staff costs (£5,500) and VAT on the rent of the new office has now also been included (£2,000).

The new leased vehicle costs will be higher than usual this year at an estimated £24,500 because part of the charge relates to usage in 2017/18, however the move to the new office closer to the SPA combined with the new leased vans is anticipated to reduce travel and subsistence costs by £16,500.

#### Projects Costs

The increase in project costs is due to a combination of factors. The purchase and installation of automatic people counters has been brought forward from 2019/20 (£7,000) and the summer SPA visitor survey cost more than previously expected (£10,000). In addition, more has been spent on successful events and promotional materials (£7,000) and there has been a small increase in costs of recruitment, SPA bird surveys and survey data analysis (£1,000).

Offsetting this are reductions relating to the change in categorisation of Skyguard costs described above (£5,500) and the deferral of SANG summer survey work for two sites until 2019/20, which will allow more time to ensure the right sites are surveyed and to make this work more cost effective (£10,000).

- 2.6. The balance in the Maintenance Account at 31<sup>st</sup> March 2018 net of expenditure incurred and paid to date was £1,466,366. A net contribution to the Maintenance Account of £134,966 is projected in 2018/19, increasing the expected balance to £1,601,333 at the end of March 2019. Any balance remaining on the Maintenance Fund after all costs have been paid may be transferred to the Endowment Fund.

### **3. Projected Financial Position for the 2019/20 and 2020/21 Financial Years**

- 3.1. The projected financial position for the 2019/20 and 2020/21 financial years is shown in Appendix 4.
- 3.2. The SAMM business plan envisaged that approximately £1.6m annual tariff income would be required over the period that developers were paying the tariff to ensure that annual running costs could be met whilst also allowing for 70% of total income to be transferred to the Endowment Fund to ensure the financial sustainability of the SAMM in perpetuity. The projected tariff income for the 2019/20 and 2020/21 financial years is £1.5m and £1.1m respectively, based on information provided by each of the partners.
- 3.3. Tariff income forecasts are used to inform future cash flows and to assist the Board in making decisions about the level of risk that will need to be taken to achieve the necessary investment returns to fund the SAMM activity on a long term basis.
- 3.4. The SAMM business plan also allowed for expenditure of approximately £500,000 per annum on an ongoing basis. Actual ongoing expenditure is expected to be in the region of £502,000 per annum, based on current approved staffing and activity levels, with approximately £20,000 every four years for the SPA visitor survey.
- 3.5. In previous years, actual annual expenditure has not reached these levels, primarily because fewer wardens have been recruited than initially planned. The project is currently forecast at full approved staffing levels of six full time and six seasonal workers, a communication officer, an education officer and a project manager.
- 3.6. The projected costs for 2019/20 and 2020/21 have increased by £41,000 since the previous JSPB meeting to £502,000. The increase consists of £40,000 additional staff costs and £1,000 additional project costs.

#### Staff Costs

The higher staffing costs are as a result of the new Education Officer (£32,500) and a projected 1% pay award (£3,500). VAT on the rent of the new office has now been included (£2,000) and the cost of Skyguard lone worker personal safety devices and

the associated service charges have been moved from project costs (£5,500). The new leased vehicle costs are forecast to cost £10,500 per annum. The move last year to the new office which is closer to the SPA combined with the new leased vans is anticipated to reduce travel and subsistence costs by £14,000.

### Project Costs

The increase in project costs is due to the postponed SANG summer survey work from 2018/19 (£5,000) and small increases on events, SPA bird surveys and survey data analysis (£1,500). Offsetting these increases is the purchase of automatic people counters which was brought forward to 2018/19 (£5,500).

- 3.7. Based on the current projections of income and expenditure, the Endowment Fund balance is expected to increase over the next three financial years to £10.495m by March 2021, as shown in Appendix 5. The balance within the Maintenance Fund is however expected to decrease from a forecast opening balance in April 2019 of £1.601m to £1.426m by March 2021 as increasing costs are set against a projected reduction in income. Any balance on the Maintenance Fund may be transferred to the Endowment Fund, however it is anticipated that this balance will be used to sustain full staffing levels and programme delivery in the medium term as tariff income starts to decline.

## **4. Investment of funds in the Endowment Fund**

- 4.1. A separate agenda item concerning the investment of funds in the Endowment Fund is being presented to the Board today and may result in the appointment of an independent financial advisor to advise on the investment of funds held in the Endowment Fund.
- 4.2. Tariff income is collected by LPAs and passed to the Administrative Body. This tariff income is used to fund current project expenditure (the Maintenance Fund) and to accumulate sufficient balances to fund future project expenditure and the cost of long term maintenance and protection of the SPA (the Endowment Fund).
- 4.3. Under the terms of the SAMM agreement (section 5.3) the JSPB is given responsibility to review the value and performance of the Endowment Fund on a regular basis and provide direction as to when, how and from whom the services of an Independent Financial Adviser are to be procured.
- 4.4. The SAMM agreement envisaged the management of the balance in the Endowment Fund to be undertaken by an Independent Financial Adviser, to maximise the return achieved within the investment guidelines set by the JSPB.
- 4.5. Fund balances are currently held by the Administrative Body, receiving interest at an assumed rate of at least 0.5%. Under the terms of the SAMM agreement, the Administrative Body is required to pay interest at not less than 0.25% below the Bank

of England base rate, with that base rate currently standing at 0.75% since August 2018.

## **5. Recommendations**

5.1. It is recommended that:

- The current financial position and projected financial position for the three financial years to 31<sup>st</sup> March 2021 is noted.

## Appendix 1 - Financial Summary to 31 March 2018

<b>Income</b>	<b>Cumulative to 2015/16 £</b>	<b>2016/17 £</b>	<b>2017/18 £</b>	<b>Total £</b>
Bracknell Forest BC	488,773	729,954	411,810	1,630,537
Elmbridge BC	96,040	151,164	59,246	306,450
Guildford BC	646,636	147,643	178,952	973,231
Hart BC	630,569	99,197	1,209,774	1,939,541
Runnymede BC	197,190	88,200	107,465	392,855
Rushmoor BC	342,091	142,761	193,687	678,539
Surrey Heath BC	537,741	90,017	325,909	953,667
Waverley BC	139,586	71,339	125,102	336,027
Windsor & Maidenhead RB	129,664	13,249	2,131	145,044
Woking BC	451,607	45,461	638,146	1,135,214
Wokingham BC	468,895	825,512	593,669	1,888,076
Interest	26,425	12,992	26,470	65,887
<b>Total Income</b>	<b>4,155,215</b>	<b>2,417,490</b>	<b>3,872,361</b>	<b>10,445,067</b>
<b>Expenditure</b>				
Project costs Natural England	792,969	420,758	429,618	1,643,344
Administration fee Natural England	49,320	10,160	11,581	71,061
Financial Administration HCC	95,000	20,000	20,000	135,000
<b>Total Expenditure</b>	<b>937,289</b>	<b>450,918</b>	<b>461,199</b>	<b>1,849,405</b>
<b>Net Income/(Expenditure)</b>	<b>3,217,927</b>	<b>1,966,572</b>	<b>3,411,162</b>	<b>8,595,661</b>

## Appendix 2 – Projected Financial Summary for the year to 31 March 2019

<b>2018/19</b>	<b>Budget</b>	<b>Actuals to end of August</b>	<b>Outturn Forecast</b>	<b>Variance to Budget</b>
<b>Income</b>	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Bracknell Forest BC	122,850	402,848	402,848	279,998
Elmbridge BC	35,000	7	35,000	0
Guildford BC	170,000	0	170,000	0
Hart DC	130,427	0	130,427	0
Runnymede BC	59,185	5,040	59,185	0
Rushmoor BC	395,369	0	395,369	0
Surrey Heath BC	110,000	159,523	159,523	49,523
Waverley BC	0	2,290	2,290	2,290
Windsor & Maidenhead RB	56,595	0	56,595	0
Woking BC	193,158	(40,403)	193,158	0
Wokingham BC	379,508	53,268	379,508	0
Interest	25,000	0	60,000	35,000
<b>Total Income</b>	<b>1,677,091</b>	<b>582,573</b>	<b>2,043,902</b>	<b>366,811</b>
<b>Expenditure</b>				
Natural England Staff Costs	364,389	95,941	375,928	11,539
Natural England Project Costs	61,350	975	70,695	9,345
Natural England Admin Fee	11,581	0	11,581	0
HCC Admin Fee	20,000	20,000	20,000	0
<b>Total Expenditure</b>	<b>457,320</b>	<b>116,916</b>	<b>478,204</b>	<b>20,884</b>
<b>Net Income/(Expenditure)</b>	<b>1,219,771</b>	<b>465,657</b>	<b>1,565,698</b>	<b>345,927</b>

### Appendix 3 – Detailed Income Summary

	Previous years	2018/19					Variance
		Budget	Actuals to date	Notified contributions	Forecast qtr 4	Projected total	
	£	£	£	£	£	£	£
<b>INCOME</b>							
Bracknell Forest BC	1,630,537	122,850	402,848	0	0	402,848	279,998
Elmbridge BC	306,450	35,000	7	8,353	26,639	35,000	0
Guildford BC	973,231	170,000	0	60,776	109,224	170,000	0
Hart DC	1,939,541	130,427	0	34,268	96,159	130,427	0
Runnymede BC	392,855	59,185	5,040	0	54,145	59,185	0
Rushmoor BC	678,539	395,369	0	52,910	342,459	395,369	0
Surrey Heath BC	953,667	110,000	159,523	0	0	159,523	49,523
Waverley BC	336,027	0	2,290	0	0	2,290	2,290
Windsor & Maidenhead RB	145,044	56,595	0	9,305	47,290	56,595	0
Woking BC	1,135,214	193,158	(40,403)	74,759	158,802	193,158	0
Wokingham BC	1,888,076	379,508	53,268	0	326,240	379,508	0
Interest	65,887	25,000	0	0	0	60,000	35,000
<b>Total Income</b>	<b>10,445,067</b>	<b>1,677,091</b>	<b>582,573</b>	<b>240,371</b>	<b>1,160,958</b>	<b>2,043,902</b>	<b>366,811</b>
<b>Maintenance Fund</b>	<b>3,315,772</b>	<b>503,127</b>				<b>613,171</b>	
<b>Endowment Fund</b>	<b>7,129,295</b>	<b>1,173,964</b>				<b>1,430,731</b>	

#### Appendix 4 – Projected Income and Expenditure 2018/19 to 2020/21

<b>Income</b>	<b>Previous years £</b>	<b>Projected 2018/19 £</b>	<b>Projected 2019/20 £</b>	<b>Projected 2020/21 £</b>
Bracknell Forest BC	1,630,537	402,848	415,170	396,900
Elmbridge BC	306,450	35,000	25,000	19,360
Guildford BC	973,231	170,000	45,246	0
Hart BC	1,939,541	130,427	130,427	130,427
Runnymede BC	392,855	59,185	35,875	11,305
Rushmoor BC	678,539	395,369	338,578	376,439
Surrey Heath BC	953,667	159,523	0	0
Waverley BC	336,027	2,290	0	0
Windsor & Maidenhead RB	145,044	56,595	56,595	56,595
Woking BC	1,135,214	193,158	193,158	0
Wokingham BC	1,888,076	379,508	235,261	132,158
Interest	65,887	60,000	80,000	85,000
<b>Total Income</b>	<b>10,445,067</b>	<b>2,043,902</b>	<b>1,555,309</b>	<b>1,208,184</b>
<b>Total Expenditure</b>	<b>1,849,405</b>	<b>478,204</b>	<b>502,179</b>	<b>502,179</b>
<b>Net Income/(Expenditure)</b>	<b>8,595,661</b>	<b>1,565,698</b>	<b>1,053,131</b>	<b>706,005</b>

## Appendix 5 – Projected Endowment Fund Balance

	<b>2017/18 Actuals £</b>	<b>2018/19 Projected £</b>	<b>2019/20 Projected £</b>	<b>2020/21 Projected £</b>
Income	3,872,361	2,043,902	1,555,309	1,208,184
70% to Endowment Fund	2,742,664	1,430,731	1,088,717	845,729
30% to Maintenance Fund	1,129,697	613,171	466,593	362,455
Expenditure	461,199	478,204	502,179	502,179
<b>Maintenance Fund:</b>				
Balance brought forward	797,868	1,466,366	1,601,333	1,565,747
Transfer from/(to) income	668,498	134,966	(35,586)	(139,724)
<b>Balance carried forward</b>	<b>1,466,366</b>	<b>1,601,333</b>	<b>1,565,747</b>	<b>1,426,023</b>
<b>Endowment Fund:</b>				
Balance brought forward	4,386,631	7,129,295	8,560,026	9,648,743
Transfer from/(to) income	2,742,664	1,430,731	1,088,717	845,729
<b>Balance carried forward</b>	<b>7,129,295</b>	<b>8,560,026</b>	<b>9,648,743</b>	<b>10,494,471</b>

THAMES BASIN HEATHS  
JOINT STRATEGIC PARTNERSHIP BOARD

Date: 11<sup>th</sup> September 2018

Subject: SAMP Project update

Report of: Strategic Access Management and Monitoring (SAMP) Project

Recommendations:

- To NOTE the contents of the report on SAMP project activity

Purpose of the Report:

To provide the JSPB with an update on SAMP project activity since the last meeting in April 2018.

## 1. SAMP project staffing and recruitment

### Seasonal wardens

- 1.1 Two of the seasonal wardens left the project early in July. The remaining 5 wardens completed their full contract.

### Year round wardens

- 1.2 The comms and education officer, Katie Breach, left the project at the end of April. Since that time, the senior warden, Sarah Bunce, has been partially backfilling this role. The project manager, Ann Conquest, has been supporting Sarah with her duties. Katie's departure has provided the opportunity to look at responsibilities within the project and re-organize responsibilities to maximize skills and efficiency. A new senior warden, Annie Osborn, has been recruited to work with Sarah, to replace Katie. They will split the comms/senior warden role; Sarah will take the lead on comms. and Annie will take the lead on the functional management of the team, but they will work together closely to deliver the two roles jointly, particularly during the summer when the team expands to around 15 staff. The new education and engagement officer will take the lead on the curriculum based education side of the project. The recruitment for the education officer is live on the civil service jobs website, with a closing date of 20<sup>th</sup> September and interviews on 27<sup>th</sup> September.
- 1.3 One of the year round wardens left the project at the end of August to take up a new role with Bird Aware Solent. This left the project with one part time and one full time year-round warden vacancies (one had been partially filled over the summer by a staff member

increasing her hours). These are currently live on the civil service website with a closing date of 23<sup>rd</sup> September and interviews on 1<sup>st</sup> October.

## 2. Wardening and Delivery

2.1 The project normally provides a warden service on the SPA seven days a week from 07:00 to 19:00 (daylight hours permitting).

### SPA Wardening

2.2 The updated warden output for the project for 2018 is set out below. The following tables set out the number of hours of warden activity delivered on the SPA during the sensitive period March – August 2018.

March	Total hours wardened	393
	Number of interactions	426
	Number already spoken to	125
	Leaflets handed out	456
	Number of dogs	441
	Number of dog walkers (5+)	6
	Average already spoken to	29.34%

April	Total hours wardened	702
	Number of interactions	1230
	Number already spoken to	385
	Leaflets handed out	1296
	Number of dogs	1206
	Number of dog walkers (5+)	27
	Average already spoken to	31.30%

May	Total hours wardened	651
	Number of interactions	1086
	Number already spoken to	314
	Leaflets handed out	1138
	Number of dogs	1044
	Number of dog walkers (5+)	23
	Average already spoken to	28.91%

June	Total hours wardened	625
	Number of interactions	1248
	Number already spoken to	347
	Leaflets handed out	1254
	Number of dogs	1038
	Number of dog walkers (5+)	15
	Average already spoken to	27.80%

July	Total hours wardened	580
	Number of interactions	976
	Number already spoken to	358
	Leaflets handed out	901
	Number of dogs	832
	Number of dog walkers (5+)	15
	Average already spoken to	36.68%

August	Total hours wardened	543
	Number of interactions	1034
	Number already spoken to	278
	Leaflets handed out	1249
	Number of dogs	811
	Number of dog walkers (5+)	17
	Average already spoken to	26.89%

2.3 The tables above show the total hours wardened, the number of interactions undertaken during those hours, the number of people already spoken to, the number of leaflets handed out, the number of dogs with the people/groups spoken to, and the number of dog walkers with five or more dogs. The number of people already spoken to, and the percentage of

total interactions which were with people already spoken to provide an indication of how many site users have been made aware of site sensitivities through previous interactions with the warden team.

- 2.4 The number of hours wardened has varied over the sensitive period this year due to a number of factors. Wardening this year has been very challenging due to the inclement weather. We began with “The Beast from the East” – heavy snow which delayed the start of the wardening season as the office was closed on 1<sup>st</sup> and 2<sup>nd</sup> March. During March, wardening hours are down due to this and several days of staff training at the beginning of the season, plus more snow at the end of the month. We had more staff training in May and some staff sickness. Then the very hot weather hit us hard in June and July: this year was the hottest summer ever recorded in England. During July and August, wardening hours are down due to the weather, staff holiday, staff sickness and early leavers. The increased number of sites that we warden and making use of project vans has also added to our logistics, which has affected hours wardened across the season, and will do going forward.
- 2.5 Number of interactions was maximised during the heatwave by wardening at either end of the day. We found that sites were very empty from around 11am onwards, particularly of dog walkers, and that staff were finding long days in the heat challenging and unproductive later in the day. We concentrated our efforts in the coolest parts of the day, when sites were busiest. We also maximised interactions by working weekends. Over 25% of start times were before 8am during June-August to try and beat the heat, and a total of 194 weekend days were worked by the team to try and maximise the number of interactions with site users in this very unusual year. The presence of travellers and the introduction of car park charging has also affected the amount of interactions on some sites.
- 2.6 The figure showing the “number of people already spoken to” provides the project with an indication of the level of saturation that has been achieved. In 2017, we found that on average around 40% of our interactions were with people that we had already spoken to. This year this is around 10% lower as the figures above show. This is likely to be because we have begun wardening the MoD sites, which have never been wardened before and have attended more events this year. This figure shows that we are reaching a new audience, which is supported by the figures for the amount of leaflets we have handed out, which is a similar number to last year, despite the above constraints on our wardening.
- 2.7 The number of dog walkers with five or more dogs is included as individuals with large numbers of dogs are likely to be commercial dog walkers, although they may just be owners who have lots of dogs.
- 2.8 To summarise, during March – August 2018 the project delivered 3492 hours of wardening, had 6000 interactions with people who had 5372 dogs and gave out 6294 leaflets.

### **3. Access to SPA land**

- 3.1 A new access agreement has been signed with Tweseldown racecourse to warden at Tweseldown, which is adjacent to the Army land at Bourley and Long Valley. An orientation event is being arranged with the land manager for the wardening team in November.

#### **4. SPA and SANGs Monitoring**

- 4.1 A full commercial tender exercise was undertaken to make sure that this work was competitive both commercially and technically. Ecological Planning and Research (EPR) won the tender and their surveyors, from Marketing Means, have now completed the survey, conducting over 900 interviews at 30 access points across the SPA during the summer holidays. One access point – roundabout car park at Chobham Common, has been undersurveyed due to 2 traveler incursions and a final attempt to survey this point is scheduled on the weekend of 15<sup>th</sup>/16<sup>th</sup> September once the travelers have been moved on.
- 4.2 The summer SANG surveys were deferred until next year allowing more time to ensure the right sites are surveyed and to make this work more cost effective.
- 4.3 We have continued to complete our car park transect surveys and people counter monitoring. Footprint Ecology have just been commissioned to analyse the 2017 data.

#### **5. Partnership working**

- 5.1 Wildfire has been a big problem on the SPA this year due to the hot, dry conditions. On 25<sup>th</sup> June the longest consecutive amber wildfire warning was given after 4 days. This continued well into July due to the heatwave. Ash Ranges, Chobham Common, Whitmoor common, Yateley Common, Horsell Common and Sheets Heath all suffered from fires, some of them several times. This not only created a big hazard to people and property, damaged the habitat but has also taken up a huge amount of firefighting resource. We have worked very closely with the fire brigade to respond to these events and their aftermath, reporting fires early, keeping the public safe and reporting any remaining hotspots following fires. We have also supported the fire service by sharing their posts and having wildfire targeted posts on social media and our website. One of our events during Heath Week was supported by the Hampshire Fire service and was well received by the public.
- 5.2 We have worked closely with the Forestry Commission to draft signage on their sites about the ground nesting birds that is aligned with our dates across the SPA but in their livery.
- 5.3 The team have liaised with partner organizations on a number of issues this year about changes or issues on-site. Issues have included MoD access issues at Hawley and fencing at Long Valley, Surrey County Council car park charges, Horsell common commercial dog walker licencing, HCC countryside canines scheme, Forestry Commission pylon works and other local site issues. This partnership working has been essential to convey a cohesive message to the public, to maximize engagement and build our reputation on-site and with partners.
- 5.4 The first season wardening the MoD land has gone very well. Feedback from the range marshalls and access specialist has been very good and we have run a number of joint events – pit stops and the multi agency event at Caesar's Camp. We have a review meeting with Col Dickie Bishop on 18<sup>th</sup> September.

## 6. Communications, Promotion and Events

- 6.1 The Thames Basin Heaths Partnership website can be accessed at [www.tbhpartnership.org.uk](http://www.tbhpartnership.org.uk). Over the summer, we have used the website to publish blogs from the wardens about the birds, our wardening activities, articles on wildfire and the wildlife on the heaths. The wording of our “Wildfire Alert!” article on what to do in the event of a wildfire was adopted by Surrey Wildlife Trust and also use by the NE Thames team in their comms. Since June, when the updated website went live, we have published 28 articles/blogs/news items and 26 events, including the Heath Week events. The analytics show a peak of activity in engagement around Heath Week and that this section and the greenspaces section of our website were the most popular amongst site users. Our most popular article was about educating children on the dangers of starting fires at the beginning of the school holidays, with 449 views.
- 6.2 The ‘Greenspace on your doorstep’ booklet is being handed out by the wardens on-site and at the pit-stop events in SPA car parks. The A5 booklet contains details of all the SANGs listed on the website along with a pull-out map. The public have given us great feedback about the booklet, such as “I’ve found some lovely places in there – can I have a couple to give to my friends please?” and “we are working our way through this booklet, we have visited about half the sites so far – it’s great!”.

We have begun to work with project partners on how to update this over the winter to include all the more recently opened SANGs and provide more information to the public about sites so they can easily select their preferences for where to visit.

- 6.3 We have produced a brand new main project leaflet to include a much larger map incorporating the SPA and also the SANGs. This was following feedback from site users, partners and feedback from academics who were researching the approach that it was useful to see the locations of alternative greenspace in relation to the SPA. The leaflet has been well received by partners and site users. The map graphic will be used in the update of the greenspace booklet, which will link the information in the two leaflets and maximize value for money.
- 6.4 Our ‘Heathland Hounds’ project, a dog owner focused initiative promoting positive behavior (specifically on the SPA but also more generally) has made good progress this summer. Run by warden Nicola Buckland (Nicky), the group is continuing to build steadily, with an additional 200 Facebook group members this year. We are seeing an increase in engagement with the FB group site and also had some excellent endorsements by group members. Organized dog walks have been held at Southwood Woodland and Hawley Meadows SANGs. We attended Paws in the Park, a large dog show in South Hill Park in Bracknell, on 18th August, with our Heathland Hounds information, where we handed out over 400 leaflets about the project and spoke to 180 people, virtually all of whom were dog owners.

We attended the Canines on the Common event at Horsell, engaging with dog walkers on the SANG at Heather Farm, promoting responsible dog walking on the common. Nicola has also been working with a dog behavior specialist called Natalie Light, who has provided training for volunteer “Heathland Ambassadors” under the HLF funded project in the South

Downs called "Take The Lead" <https://www.southdowns.gov.uk/enjoy/take-the-lead/become-an-ambassador/> Natalie has provided training for the wardening team on keeping safe around dogs, and attended an event during Heath Week on Horsell Common, where over 50 people took advantage of her expertise and advice. She is also giving the project advice on how best to engage with dog owners and promote positive behavior on the SPA as well as reaching our target audience effectively.

- 6.5 We have been active on Twitter: The project used #30dayswild, a Wildlife Trust initiative event during June to promote SANGs by taking photographs of the sites and promoting them on Twitter. We did 36 tweets in all over the month, 21 of them about SANGs. 8 tweets mentioned dogs, 24 mentioned wildlife, 6 events, 6 facilities/access, 4 children and 2 mentioned history. We have tweeted regularly, using hashtags #magnificanetmeadows, #nationalplayday #nationalmeadowsday #mothnight and lots of tweets about #heathweek. The number of Twitter followers has increased from 294 at the beginning of the year to 450 now.
- 6.6 Our Facebook feed has been active during the summer. During June our Facebook posts reached 13,000 people, with 3,500 people actively engaging with posts. In July we reached 12.9K people, 3,100 of whom engaged with the posts. This has increased our number of Facebook Page likes from 341 at the beginning of the year to 471 page likes now. Our most popular post this summer was our April Fool, with 4.3K people reached, followed by our video about a mass emergence of Silver Studded Blues (4.1K) our post on the new generation of ground nesting birds (3.5K) and our post about events for Heath week (3.2K people reached). Other popular posts have been about reports of SPA bird species chicks in the nests (2.8K) and what to do if you spot a wildfire (1.8K people reached).
- 6.7 We have attended a greater number of events this year. We have been to Bisley Strawberry Fayre, Elvetham heath open day, Paws in the Park, Fleet Pond Open Day, Yateley Bioblitz, Canines on the Common, Beating the Bounds of Yateley, Bramshott Farm SANG open day, Yateley May Fayre, SwinDuro, Old Dean Fun Day, we have also run a guided walk on Larks Hill and the Cut Cluster and Brookwood Country Park. We have held numerous pit stops, including at Chobham Common, Yateley Red Cross Centre, Ceasars Camp, Whitmoor Common, Hawley Lake (joint with MoD), Wildmoor Heath, Lightwater Country Park, Ash, Velmead and Barossa.
- 6.8 Heath week was an event that we found out about when we visited the Devon and Dorset mitigation projects last autumn. They run Heath Week every year, and we decided to run a similar event on the TBH this year as a trial to build the profile of the project, develop links with partners and engage the public. We ran the event during the same week, 29th July-4th August. During the week we ran 17 events over 7 days. There were 10 guided walks & 7 themed activities including bird ringing, moth trapping, conservation grazing, wildfire awareness, a treasure hunt, free advice for dog walkers, history, arts & crafts. We had a great turnout despite extremes of weather (The first day was pouring with rain – and the latter part of the week was incredibly hot). 30 children took part in a nature-themed treasure hunt at Wildmoor. Over 60 people came to Caesar's Camp to meet the cattle and learn about the site and talk to the fire brigade and army. Over 50 people came to get free advice about dog behaviour. Project partners supported us well and we were able to share promotion and messages. The feedback has been excellent and we will be running this again next year.

- 6.9 We held a stakeholder meeting on Wednesday 5<sup>th</sup> September. This was to hear about research done on the approach by Liz Allinson in her PhD about “The role of SANGs in protecting high value wildlife sites” and Bethan Baxter who did her MSc on "Putting people at the heart of the environment: The visitor access and conservation conflict of the Thames Basin Heaths SPA". Both presentations were excellent and the event generated some interesting questions and suggestions for further research. The summaries and recommendations from these presentations will be circulated to the board, once received.

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UNIVERSITY OF SOUTHAMPTON

**ABSTRACT**

FACULTY OF NATURAL AND ENVIRONMENTAL SCIENCES

Biological Sciences

Thesis for the degree of Doctor of Philosophy

**THE ROLE OF SUITABLE ALTERNATIVE NATURAL GREENSPACE IN PROTECTING HIGH-VALUE  
WILDLIFE SITES**

Elizabeth Allinson

The associated visitor disturbance from new housing developments surrounding the Thames Basin Heaths Special Protection Area (SPA) is a potential threat to the breeding success of three Annex 1 ground-nesting bird species: nightjar *Caprimulgus europaeus*, woodlark *Lullula arborea* and Dartford warbler *Sylvia undata*. In response to this threat from development, a bespoke planning policy - Suitable Alternative Natural Greenspace Strategy (SANGS) was developed to mitigate against this increase in disturbance within the Thames Basin Heaths Zone of Influence. The strategy established greenspaces to divert people from visiting the SPA. A mix of social science methods was used to evaluate SANGS and the theories that underpin it, using a Leisure Constraints Theory Framework.

A postal survey with self-completed questionnaires provided quantitative data that identified the pattern of greenspace visited by residents living in new developments. Significantly more residents visited SANGs than the SPA, and significantly fewer respondents visited their nearest greenspace, and they also travelled further than expected. The strategy did not appear to be attracting dog walkers away from the SPA. A logistic regression model showed that not having prior knowledge of the area's greenspaces, distance from home, good infrastructure and having a companion all significantly influenced greenspace choice.

Focus groups were used to provide a deeper insight into the pattern of greenspace use revealed in the survey. Awareness was identified as an important additional factor that affected the choice of greenspace. Incorporating visiting greenspace into visits to other destinations explained the unexpected longer distances travelled by residents. Policy recommendations emerging from the survey and focus groups are: to raise awareness of and educate residents about SANGs, provide

more greenspace within an optimal walking distance of new developments and provide more substantial areas of greenspace suitable for visits by car.

The semi-structured interviews concluded that the minimum footpath length of 2.3km was impractical on small sites and that a minimum size should be included in the criteria for SANGS. SANGS was thought to provide potential opportunities for linking greenspace provision with wellbeing and biodiversity agendas as well as mitigation for visitor disturbance. Providing play areas in or nearby SANGs would enable families and children to reconnect with nature.

The breeding numbers of all three priority bird species have not decreased since the implementation of SANGS which suggests that it may be providing mitigation for the increased visitor disturbance, although not necessarily in a way that was predicted by the underlying assumptions.

## **Summary of key findings**

### **Patterns of greenspace use**

Significantly more residents visited a SANG than the SPA and travelled significantly further than the 5km threshold identified in previous studies. Significant numbers of participants were not visiting their nearest greenspace.

Residents who were completely new to living in the Zone of Influence were significantly more likely to visit SANGs because they were not attached to the SPA. Distance from home was a significant factor influencing the choice of greenspace and visiting by foot was the travel mode of preference. There was evidence of resistance to driving to greenspace in comparison to walking from home.

Unexpectedly and contrary to previous studies, dog walking was not associated with choosing a SANG neither was rating dog-friendly attributes as important. This is a failure of the policy which is targeted at dog walkers. However, this may have been influenced by the small sample size compared with on-site studies. On-site social interaction was significant in influencing the choice of greenspace and may be mitigating concerns about safety on a site.

The presence of other people was often considered to enhance the safety of a site especially in the case of females but was considered as a negative attribute by some other visitors. Rating good infrastructure on a site such as surfaced paths, way-marking and somewhere to sit down significantly influenced the choice of greenspace type. Environmental and dog-friendly attributes were criteria essential for a SANG but were not significantly associated with choosing a SANG.

## **Identify factors affecting greenspace choice and effectiveness of SANG strategy**

Passive enjoyment of greenspace was considered very important for well-being and facilitating de-stressing.

In the case of general awareness of the TBH Zone of Influence and its conservation issues, established residents and SPA visitors were aware of the issues but showed little interest in visiting any SANGs even if they were aware of their location. However, there was evidence that some older residents were starting to visit SANGs because they were accessible.

Residents living in post-SANGS housing developments were often aware of a bespoke SANG proximal to their housing or larger strategic SANGs such as country parks, but they were generally unaware of the smaller strategic SANGs within 5km of their development. Focus group participants were very supportive of the strategy when it was revealed and explained to them.

Word of mouth was the most common way of discovering the location of a greenspace in the survey and finding the location of greenspace by entrance sign increased the likelihood of visiting a SANG. In focus groups SANG visitors used websites to access information and reported that developer packs were not always available to new residents when they moved into the TBH Zone of Influence.

There is evidence that residents who were familiar with the TBH Zone of Influence before moving into the area continued to visit greenspace that they had previously become attached to and to be new to the area made visiting a SANG significantly more likely.

### **Expert stakeholder opinion**

There is a perceived lack of causal evidence regarding the impact of SANGS but a general acceptance that they are attracting visitors.

There have been several unexpected benefits associated with the strategy: the area has received a large increase in greenspace which is advantageous, regardless of whether it is effective in displacing disturbance or not; and the long-term nature of the agreements facilitate planning for biodiversity. Other unexpected benefits are that developments with greenspace sell easily and SANGs are providing improved accessibility to greenspace for residents as they age in-situ, according to developer interviews.

There is enormous potential to enable people to connect with nature through living in a development with a SANG next-door. New housing is often purchased by young families which increase the potential to embed a connection with nature in childhood that will last a lifetime.

There are concerns that the perpetuity factor of an agreement makes SANGS very expensive along with the resource input needed before it is open to visitors. The length of the walk, 2.3km specified in SANG criteria, is cited as impractical and too short and there is also a lack of suitable SANG land due to the speculative acquisition of land.

There is evidence of collaboration within and between organisations that are involved in SANGS and evidence of a desire to link to the wellbeing agenda. There have been suggestions for a quality benchmarking scheme for SANGS to ensure that the experience of visiting is consistent and high quality throughout the Zone of Influence and adds value to the development as a whole. Support is growing for the strategic, rather than piecemeal, allocation of land for SANGS so it can be both more easily acquired and more effective at attracting visitors.

## **Policy Implications**

Natura 2000 sites, such as the TBH SPA, form the backbone of the European Biodiversity Strategy (EC, 2011) and its Green Infrastructure (GI) Strategy (EC, 2013) through which it is delivered. The National Planning Policy Framework (2018) encourages a network of local GI plans to deliver GI, and SANGS is a welcome addition to GI strategy and an opportunity for not only No Net Loss but Net Positive Impact for biodiversity.

SANGS is gaining popularity as an avoidance strategy both in southern and more recently northern England (New Forest District Council, 2018; Borough of Poole, Bournemouth Borough Council, Christchurch Borough Council, Dorset County Council, East Dorset District Council, Purbeck District Council, Wealden District Council, 2015 and Mansfield District Council, 2017).

The results of an EU fitness check on the EU Birds and Habitat Directives (European Commission (EC), 2016) showed that they are fit for purpose but to fully achieve the objectives, co-ordinated implementation between local authorities and stakeholder partners should be improved. The TBH SANGS is cited as an exemplar for avoidance mitigation policy against housing development, in an international review of mitigation hierarchy (University of Cambridge Conservation Research Institute, 2015).

Political support for SANGS is mixed in the TBH Zone of Influence it is also considered expensive by both local authorities and developers and local authorities experience difficulties in bringing forward land suitable for SANGs. Given the problem of sourcing SANGs, purchase of large tracts of land to create much larger SANGs which provide a more credible alternative to the SPA could be more cost-effective and logistically less complex.

In the light of the results from this study, large strategic SANGs and bespoke SANGs next to developments, both with natural play areas and biodiversity improvements, could enable delivery the Accessible Natural Greenspace Standard (ANGSt) agenda (2006a) and GI strategies.

## **Future work**

This study has evaluated the effectiveness of SANGS outputs on the target population of residents in new housing developments. However, to evaluate the longer-term impact of SANGS on Annex 1 bird populations, the next logical step is to explore the causal relationships of other environmental variables. This will enable the impact of the strategy to be evaluated in comparison to the impact of other external factors. Generalised linear mixed models could be used to quantify the effects of environmental variables, for example, house building, visitor pressure, distance from footpaths, the occurrence of uncontrolled burning and condition of habitat on breeding bird counts.

Evidence from the repeat SPA survey results indicates that the presence of SANGs may be influencing the visiting behaviour of established residents (Fearnley and Liley, 2013). The postal survey can be repeated using a stratified sample of both pre and post-SANGS residents in equal numbers, to find out if a compensatory visitor flow between the SPA and SANGs has occurred and if it affects the effectiveness of the strategy.

Analysis of more data from dog walkers is needed before the results and conclusions from this study, that SANGs failed to attract dogwalkers, can be generalisable.

## **Recommendations**

The following recommendations are listed by research recommendation first then best practice recommendations and finally recommended policy adaptations which may be more challenging to implement.

### **Research Recommendations**

- Identify if there is a causal relationship between environmental factors and the Annex 1 species breeding populations

### **Best Practice Recommendations**

- SANG owners and managers continue to improve awareness of SANGs by ensuring developer packs have the relevant information, increase on-site public engagement and increase signage to SANGs and within SANGs for visitor management where appropriate
- The TBH JSP to hold a stakeholder event to disseminate the research results to date amongst interested stakeholder groups
- SANG owners and managers to provide Infrastructure to encourage visitor social interaction such as suitable outdoor seating
- SANG owners and managers to maximise the opportunity to create a more biodiverse SANG environment where possible

### **Policy Recommendations**

- Local authority planners, developers and Natural England aim to support developments with adequate integral greenspace as bespoke SANGs where possible on the ground
- Planners and design consultants to integrate play areas into greenspace to potentially embed a connection to nature in children that can enable the next generation to access therapeutic benefits from visiting a greenspace
- Natural England to modify the criteria for SANGs to increase the minimum size of a SANG so the 2.4km can be easily accommodated
- Replace the requirement for strategic SANGs with larger 'Super SANGs' on a par with the size of some of the SPA sites of at least 100ha and preferably 500ha according to the ANGSt agenda
- SANG ownership, management, and monitoring should be the responsibility of an enduring public body with the associated inalienable rights
- Strategic plans to encourage the integration of SANGS into other strategies relating to health, wellbeing, green infrastructure and biodiversity

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