

*Hart, Rushmoor and Surrey Heath
SPA Mitigation Project*

Strategic Access Management and Monitoring (SAMM) Project Background Paper

June 2020



RUSHMOOR
BOROUGH COUNCIL

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This background paper is one of a collection of evidence/background studies which have been prepared alongside the main report on the HRSH SPA Project. The full set of published report are set out below:

SPA Visitor Distribution and Access Background Paper

Suitable Alternative Natural Greenspace (SANG) Background Paper

Strategic Access Management and Monitoring (SAMM) Background Paper

Suitable Alternative Natural Greenspace (SANG) Research Study

Habitat Restoration Feasibility Study

Access Restriction Research Study

Access Management Research Study

Car Parking Research Study

Dog Control Research Study

Mitigation Capacity Review & Supporting Advice

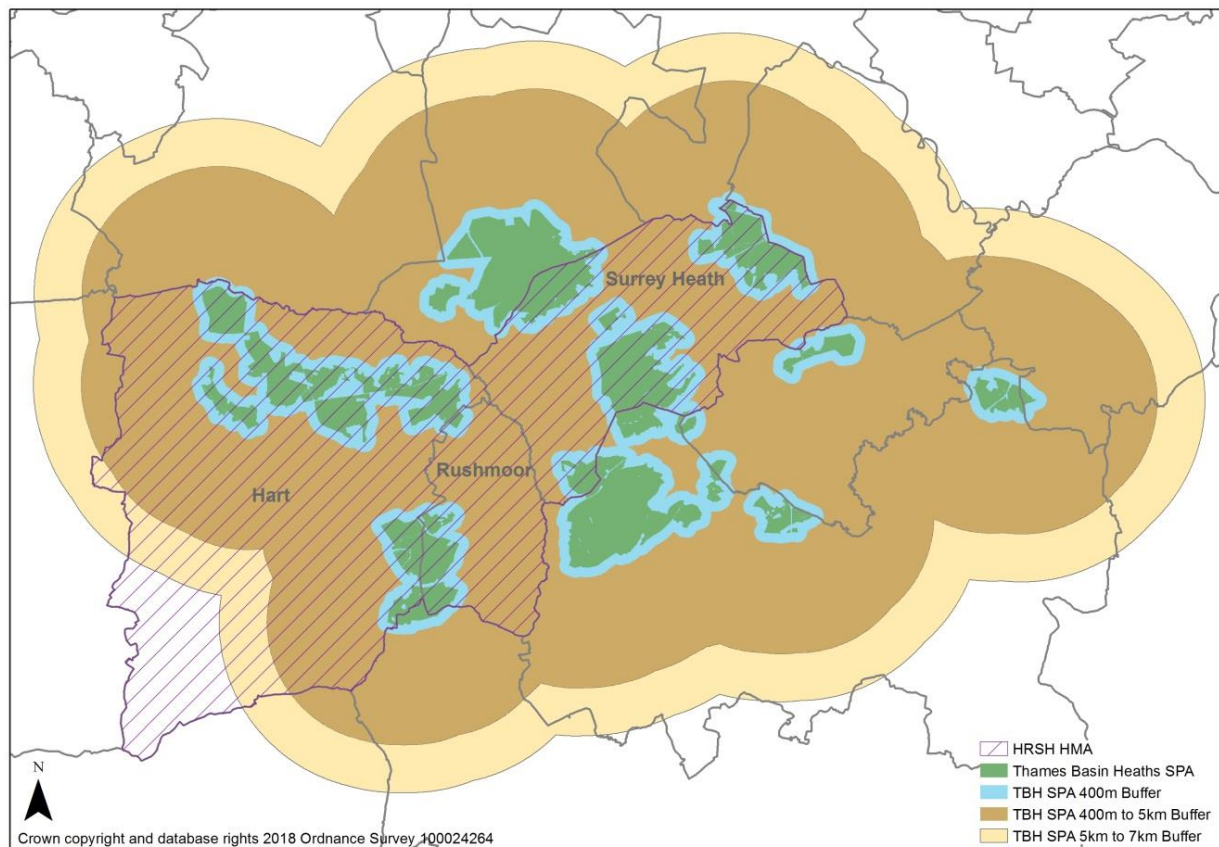
HRSH SPA Mitigation Project Report

1. Introduction

- 1.1. Hart, Rushmoor and Surrey Heath Council's form part of the HRSH Housing Market Area (HMA) (Figure 1). A significant proportion of the HMA is either designated as Thames Basin Heaths Special Protection Area (TBH SPA) or within the three buffer zones for the SPA (92%). The Councils have worked collaboratively to deliver access to cross boundary Suitable Alternative Natural Greenspace (SANG) solutions, to avoid adverse impacts on the integrity of the SPA from additional housing in line with the TBH Delivery Framework¹. However, there are many constraints to delivering development and new SANGs in the HMA area. Opportunities for delivering SANG are reducing and the Councils are concerned that the current approach to avoidance and mitigation could result in difficulties in delivering net new residential development in parts of the HMA.
- 1.2. In addition to SANG, contributions towards strategic access management are required as part of the mitigation package. This is now known as the Thames Basin Heaths Strategic Access Management and Monitoring (SAMM) project. The overall objective of the SAMM project is to protect the SPA from recreational pressures arising from new housing development through education (both on and off site), guidance, promoting the use of SANG sites, and monitoring the effectiveness of the avoidance strategy.

¹ Thames Basin Heaths Joint Strategic Partnership Board (2009) *Thames Basin Heaths Special Protection Area Delivery Framework*

Figure 1: Thames Basin Heaths Special Protection Area, buffers and the Hart, Rushmoor and Surrey Heath Housing Market Area (HMA).



Scope of the Background Paper

- 1.1. The overall aim of this two-year joint project is to identify complementary alternative mitigation measures, which can be delivered in order to mitigate new development within the HMA.
- 1.2. As noted above, the existing mitigation approach requires contributions towards strategic access management, alongside the provision of SANG. As part of the ongoing assessment of the availability of potential SANG in the HMA, a review of the evidence and a review of avoidance and mitigation strategies in place elsewhere, a number of alternative mitigation options have been identified for assessment. It is important to clarify that the aim of the project is not to evaluate the effectiveness of the existing approach as a form of mitigation. Therefore, the intention is not to remove the current mitigation options, but to consider whether there are new complementary or alternative ways of providing the required mitigation, alongside the existing SANG and SAMM approach.

- 1.3. As the delivery body for the SAMM project, Natural England is responsible for the implementation of the four elements which comprises: (i) a wardening service, (ii) a monitoring service, (iii) an education and communication service and (iv) a facilitation role.
- 1.4. We are exploring two options which would expand on elements of the existing project:
 - i. Potential for expanding the wardening service of the existing SAMM project; and
 - ii. Potential for expanding the education and communication service of the existing SAMM project.
- 1.5. This background paper on the SAMM project will present existing information which may be relevant to the assessment of the above options and further research to support this assessment.
- 1.6. The aims of the background paper are to:
 - Provide a clear understanding of the existing SAMM project; and
 - Identify scope for enhancements or expansion to the existing SAMM project.
- 1.7. Therefore, this report will cover the following:
 - Background to the SAMM project (chapter 2).
 - Details on where wardens currently operate within the SPA, how many there are, and what activities they carry out (chapter 3).
 - Details on the monitoring undertaken as part of the SAMM project (chapter 4).
 - Details on where education and communication is currently undertaken within the SPA and how/whether it is targeted (chapter 5).

2. Background

Thames Basin Heaths SPA and Disturbance

- 2.1. The Thames Basin Heaths Special Protection Area was classified in March 2005². It covers a total area of 8,274.72 hectares and consists of a number of separate sites located across the counties of Surrey, Hampshire and Berkshire in southern England. Together with the nearby Wealden Heaths SPA and Ashdown Forest SPA, the Thames Basin Heaths form part of a complex of heathlands in southern England that support important breeding bird populations.
- 2.2. There are a number of potential pathways of impact that could result in development having an impact on European sites. These include urbanisation, recreational pressure/disturbance, atmospheric pollution, water abstraction and water quality. However, the focus of this project is to consider alternative measures to avoid or mitigate recreational disturbance resulting from a net increase in residential dwellings on the TBH SPA.
- 2.3. The nature, scale, timing and duration of some human activities can result in the disturbance of birds at a level that may substantially affect their behaviour, and consequently affect the long-term viability of the population. Nightjar, woodlark and Dartford Warbler are known to be sensitive to disturbance. Disturbance caused by human activity is particularly significant in the TBH SPA because many parts are in close proximity to urban areas
- 2.4. More detail on the SPA and visitor disturbance is set out in the SPA Visitor Distribution and Access Background Paper and the HRSH SPA Mitigation Project Main Report.

The Existing Approach

- 2.5. Prior to October 2005, the UK's approach to determining any significant effects on the integrity of European sites was not extended to an assessment of plans. However, a European Court of Justice Judgment (C-6/04)³ ruled that this approach did not meet the requirements of

² English Nature (2005) *Thames Basin Heaths SPA Citation*

³ Judgement of the Court (2005) *Commission of the European Communities v United Kingdom of Great Britain and Northern Ireland*, C-6/04, EU:C:2005:626. Available at <http://curia.europa.eu/>

Article 6 of the Habitats Directive⁴. In May 2006, English Nature (now Natural England) published a Draft Delivery Plan for the Thames Basin Heaths SPA, partly in response to this judgement.

- 2.6. The Regional Spatial Strategy for the South East, the South East Plan (2009)⁵, was prepared within this context and includes Policy NRM6 on the Thames Basin Heaths Special Protection Area, which sets out a strategic approach to avoidance and mitigation. As stated in Paragraph 9.35: *“Policy NRM6 sets out the extent of mitigation measures required, based on current evidence. The evidence available indicates that effective mitigation measures should comprise a combination of providing suitable areas for recreational use by residents to buffer the SPA and actions on the SPA to manage access and encourage use of alternative sites.”* In March 2013, the Government revoked the South East Plan with the exception of Policy NRM6.
- 2.7. In 2009, a Thames Basin Heaths Special Protection Area Delivery Framework⁶ was prepared as a non-statutory document within the context of the South East Plan. It was endorsed by the Thames Basin Heaths Joint Strategic Partnership (JSP). The JSP was established by the Local Authorities that surround the SPA, along with the Regional Assembly (now disbanded) and other partners, to plan for the long-term protection of the SPA in a consistent and co-ordinated way. The JSP Board (JSPB) is advised by a number of bodies including Natural England.
- 2.8. The work of the JSP is based around the co-ordination of a three-pronged approach:
 - 1) SANG (Suitable Alternative Natural Greenspace)
 - 2) Access Management
 - 3) On Site Management of the SPA
- 2.9. It is considered that there is a combined avoidance and mitigation effect of these measures, which ensure people are provided with alternative greenspaces to visit instead of the SPA, while

⁴ European Commission Council (1992) *Directive 92/43/EEC of 21 May 1992 on the Conservation of natural habitats and of wild fauna and flora*

⁵ Government Office for the South East (GOSE) (2009) *The South East Plan: Regional Spatial Strategy*

⁶ Thames Basin Heaths Joint Strategic Partnership Board (2009) *Thames Basin Heaths Special Protection Area Delivery Framework*

also managing potential impacts on the SPA through on-site access and habitat management. The TBH SPA Delivery Framework (2009) focusses on the first two approaches. The TBH SPA Delivery Framework (2009)⁷ focusses on the first two approaches.

2.10. The approach varies depending on the linear distance from the SPA:

- Within 400m of the SPA the impact of net new residential development on the SPA is likely to be such that it is not possible to conclude no adverse effect on the SPA. There should therefore be a presumption against development within this zone.
- Between 400m and 5km, the avoidance measures recommended in the Delivery Framework should be applied.
- Applications for large-scale development proposals beyond the zone of influence, particularly 5-7km away, should be assessed on an individual basis. Where appropriate a full appropriate assessment may be required to ascertain whether the proposal could have an adverse effect on the SPA⁸.

2.11. The TBH SPA Delivery Framework (2009)⁹ sets out the JSPB's recommended approach to the provision of avoidance measures. The JSPB has no formal control on the planning decisions made in respect of the Thames Basin nor does it set any formal planning policy. Therefore, each affected authority has included a strategic policy within adopted or emerging Local Plans. In addition, each local authority has prepared an Avoidance and Mitigation Strategy to provide more detail on the approach.

2.12. More information on the SAMM project (the second element of the approach) is set out below. Background information on the existing approach to SANG (the first element of the approach) is set out in the SANG Background Paper.

⁷ Thames Basin Heaths Joint Strategic Partnership Board (2009) *Thames Basin Heaths Special Protection Area Delivery Framework*

⁸ The South East Plan Assessor, who recommended that between 5 and 7km from the edge of the SPA residential developments of over 50 houses should be assessed and may be required to provide appropriate mitigation. It is recommended that such cases be considered on a case by case basis.

⁹ Thames Basin Heaths Joint Strategic Partnership Board (2009) *Thames Basin Heaths Special Protection Area Delivery Framework*

Strategic Access Management and Monitoring (SAMM) Project

2.13. In June 2009, the JSPB agreed an Outline Business Plan, which identified the resources required to provide an effective Strategic Access Management and Monitoring (SAMM) project, together with the overall cost of providing strategic mitigation. The JSPB endorsed the principle of a tariff to fund SAMM measures in perpetuity. This is collected centrally and used strategically across the SPA.

2.14. The proportional tariff is calculated using a simple equation based on occupancy and a per capita Standard Cost. More detail on the SANG Tariff Guidance¹⁰ is set out in Appendix 1. The standard cost is derived from the overall sum required and the number of new residents. In order to ensure that the scheme is fit for purpose, the TBH SAMM tariff includes an enabling adjustment, which is intended to provide confidence that the overall income will be sufficient to ensure that the SPA is not adversely affected.

2.15. The overall objective of the SAMM project is to protect the SPA from recreational pressures arising from new housing development through education (both on and off site), guidance, promoting the use of SANG sites, and monitoring the effectiveness of the avoidance strategy. Funds from the SAMM project are used to:

- Promote SANGs as new recreational opportunities for local people and particularly encourage their use during the breeding bird season.
- Provide an on-the-ground wardening service to supplement existing wardening efforts.
- Provide an SPA-wide education programme.
- Create new volunteering opportunities.
- Demonstrate best practice for strategic access management of visitors and visitor infrastructure where the supply of greenspace is heavily dependent on protected areas.
- Monitor visitor usage of SANGs and the SPA.

¹⁰ Natural England (2011) *Thames Basin Heaths Strategic Access Management and Monitoring Project Tariff Guidance*

- Monitor Annex 1 birds on SPA sites.

2.16. A legal agreement was signed by the affected authorities, Hampshire County Council (the Administrative Body) and Natural England (the Delivery Body) in 2011. Schedule 3 of the legal agreement provides more information on the SAMM objectives and operations and is included in Appendix 2. As the Delivery Body for the SAMM project, Natural England is responsible for the implementation of the four elements of the Strategic Access Management and Monitoring service. As detailed in 2011¹¹ these comprise:

1) A wardening service

This is a specific on-the-ground presence of wardens to deal with pressures arising from new residents, and their role is to:

- Raise awareness amongst visitors of the importance and sensitivity of the SPA.
- Encourage visitors to behave responsibly on the SPA.
- Work with existing land managers, assessing visitor infrastructure and focusing on the practical experience of visitors to identify on-the-ground improvements.
- Work with existing rangers and wardens to provide consistent messages to SPA visitors and promote the use of SANGs.

2) A monitoring service

The objectives of the monitoring service are to provide strategic data on visitor numbers, monitor the effectiveness of SANGs and access management, analyse how effective the overall measures are in preventing an increase in visitor pressures on the SPA, and determine whether these measures are effective in maintaining and enhancing the populations of the SPA bird populations. The existing strategy for monitoring is as follows:

- Annual survey of the annex 1 birds.

¹¹ McKernan, P. Natural England (2011) *Thames Basin Heaths Strategic Access Management and Monitoring (SAMM) Project. SAMM Project Summary and Update*

- Visitor survey on 10-14 SANGs annually in the winter to obtain visitor feedback and assess SANG usage, distance travelled, frequency of visits etc.
- Visitor survey on SANGs that have been fully laid out and allocated to assess usage, feedback and take-up.
- Visitor surveys on the SPA in 2004, 2012 and 2018 to assess visitor pressure, user groups, distance travelled, length of visit and alternate sites used etc.
- 14 car park transect surveys a year to assess visitor pressure from car parks at different times of day/week/year.
- 36 people counters on the SPA continually recording visitor data.
- Collection of any Local Authority collected SANG people counter and visitor survey data made available.

3) An education and communication service

This service is led by the Education and Communication Officer and provides key messages and educational material to be promoted by the project and partners. The work includes developing a communications strategy with partners. The overall aim is to build an understanding of, and respect for, the conservation importance of the SPA and encourage people to take action to conserve and enhance it.

4) A facilitation role

The facilitation role is to enable the land managers to work together to share resources and best practice, co-ordinated through the Access Management and Monitoring Partnership. An important element of this work is securing an identity or 'brand' for work carried out by the partners that contributes to the overall objectives of the AMMP and the SAMM project. The team works closely with land managers to share good management practices.

2.17. The SAMM project is overseen by a Project Board, appointed by the JSPB, which steers the direction of the project, ensuring that objectives and service level agreements are being met and that value for money is being achieved. The Project Board reports to the JSPB, which acts as an Executive Board giving final approval to the reviews and recommendations made by the Project Board. Delivery of the SAMM project is also advised by the TBH Access Management

and Monitoring Partnership (AMMP). The AMMP comprises representatives of organisations, bodies, or individuals owning and/or managing land within the TBH SPA. It provides technical advice, information and assistance and, as appropriate, recommendations to the JSPB on access management measures relating to the SPA and SANGs.

3. SAMM Wardens

- 3.1. As detailed above the SAMM wardens main role is to provide a visible presence on the SPA, interacting with the public, raising awareness of the SPA sensitivities and encouraging visitors to behave responsibly.
- 3.2. The wardens record their hours and interactions with visitors and this information is reported to the JSPB Board at meetings, held twice per year. Agendas, reports and minutes of the JSPB meetings can be found on the Surrey Heath Borough Council website¹².

SAMM Wardens

- 3.3. The SAMM project employs seasonal wardens and year-round wardens. The year-round wardens focus on delivering different elements of the project, particularly during the winter months, including communications and education. A Data Analyst has recently been recruited to the team to focus on compiling and analysing project data. The officers previously relied upon employing consultants to complete this work.

SAMM Wardening across the SPA

- 3.4. The project currently provides a warden service on the SPA seven days a week from 07.00 to 19:00 (daylight hours permitting). A summary of warden activity across the SPA during the period September 2018 – August 2019 is set out below.

Table 1: Warden Activity across the TBH SPA (Sept 2018 – August 2019)

Month	Total hours wardened	Number of Interactions	Number already spoken to	Percentage already spoken to	Leaflets handed out	Number of Dogs	Number of Dogs (5+)
September	167	333	200	60%	346	331	13
October	209	324	165	51%	315	457	9
November	168	347	132	38%	385	369	9
December	253	421	116	28%	312	300	8

¹² Surrey Heath Borough Council. *Browse Meetings. Thames Basin Heaths Joint Strategic Partnership Board.* Online at: <https://surreyheath.moderngov.co.uk/ieListMeetings.aspx?Committeeld=316>

January	311	657	239	36%	584	759	21
February	306	644	204	31%	517	526	11
March	702	753	193	26%	1000	679	1
April	592	985	323	33%	1135	1020	31
May	722	1940	491	25%	2962	1563	30
June	478	1461	297	20%	1968	876	15
July	558	1311	427	33%	1568	1041	21
August	518	1466	384	26%	1551	971	13
Total	4984	10642	3171	N/A	12643	8892	182

- 3.5. The number of hours wardened reduces and the number of interactions decreases during the autumn and winter months, due to a number of factors: more partnership work is undertaken, days are shorter and colder, sites are considerably quieter, SANG surveys are carried-out and preparation for the following summer are completed.
- 3.6. In the 2019 summer season the project used new engagement ideas to increase the number of interactions. Standard pitstops were used where wardens set up information displays, normally with a gazebo, at SPA car parks. Mini pit-stops were also implemented with wardens setting up temporary static information displays next to paths within the SPA area. Normal wardening across the summer enabled up to 2 interactions per hour (an average of 1.66), compared to engagement of up to 6 interactions per hour at events and up to 4 interactions per hour (average of 2.93) at mini pit-stops.
- 3.7. In May 2019, a total of 1,940 individuals were engaged with, the highest month of the project to date. This month showed the highest number of hours dedicated to pitstops, with many being undertaken on the weekend at busy sites.
- 3.8. This suggests that events are most effective at engaging high numbers and pitstops are more effective than 'normal wardening' when engaging those individuals already using the SPA. However, it is important to note that this data does not measure the quality or impact of the interactions.
- 3.9. The total number of interactions per hour between 2017 and 2019 (during the summer seasons) has remained stable with an overall increasing trend. Whilst more hours were spent wardening during the 2017 season, the level of engagement was lower, indicating less interactions during 'normal wardening' compared to at events and pitstops.

- 3.10. The SAMM project monitors the proportion of interactions the wardens have with those that are already aware of the project. On average, just over a third of individuals (36.5%) encountered whilst 'normal wardening' said that they were already aware of the project. In comparison, just under a quarter of individuals (24.5%) spoken to at the pitstops said they were already aware. The approach to pitstops has been targeted. They have been set up in areas which are rarely wardened, or where people traffic is high and aim to engage with all individuals using that location on a given day.

Attendance at Events and Partnership Working

- 3.11. The SAMM wardens attended 21 events during the 2019 summer season. This included four events on SANGs and several local events within communities around the SPA. The events included attendance at village fayres/fetes, a Fire Awareness Day at a local community centre and Heritage Day at Sandhurst Academy. There were also a number of nightjar guided walks given on the SPA.
- 3.12. The Project Team are also working on a joint initiative with Surrey & Fire Rescue Service, known as K9 Fire Patrol. This initiative is designed to encourage dog walkers to keep an eye on their local heaths. In return for recording time spent on the heaths, reporting any fires, fly-tips and anti-social behaviour and spreading information about what to do in the instance of fire, dogs are presented with a Hi-Viz jacket to promote the scheme. This jacket is a useful talking point in engaging other heath users around fire safety, providing the perfect opportunity to spread awareness about wildfires and the risk they pose to people, businesses and wildlife.
- 3.13. In addition, the team has launched regular Fire Fighting Friday pit-stops to spread key messages about heathland wildfires with the aim of reducing their incidence. A number of these events have been supported by local fire and rescue services. Pitstops have taken place at Lightwater Country Park, Brentmoor Heath, Horsell Common, Whitmoor Common, Barossa, Yateley Common, Caesars Camp. This has provided an opportunity to encourage sign up to the K9 Fire Patrol scheme.

Heath Week

- 3.14. The first Heath Week was held in 2018 and due to its success, was held again in 2019. Over the course of a week, 26 heath-themed events involving eighteen partners took place across Berkshire, Hampshire and Surrey. The events aimed at raising public awareness of the

heathland's diversity and included a variety of natural history walks and talks, arts and crafts, dog behaviour sessions, wild fire awareness and opportunities to meet the cattle and learn about conservation grazing.

SAMM Wardening in the HMA

3.15. As noted in chapter 2, part of the SAMM project includes a warden service, which involves an on-the-ground presence on the SPA. On parts of the SPA in the HMA, there has been a total of over 8,800 hours spent wardening between January 2017 and December 2019. This is set out in Table 2 below.

Table 2: Total time spent wardening (hours)

Year	Surrey Heath	Hart	Rushmoor	Total
2017 (Jan-Dec)	1720	1368	103	3192
2018 (Jan-Dec)	1468	1122	329	2920
2019 (Jan-Dec)	1381	1035	318	2734
Total	4569	3525	750	8846

3.16. The wardens currently aim to cover as much of the SPA as possible but can also prioritise sites where there may be higher visitor numbers. There are also some areas of SPA which the wardens cannot currently access due to landowner permissions.

Table 3: Areas of SPA within the HMA that wardens visit

Surrey Heath	Hart	Rushmoor
Lightwater Country Park	Bramshill	Caesar's Camp
Brentmoor / Folly Bog	Heath Warren	Long Valley (now limited public access)
Bisley Common	Warren Heath	
West End Common	Castle Bottom	
Chobham Common	Yateley Common	
Barossa	Hazeley Heath	
Poors Allotment	Hawley Common	
Turf Hill	Velmead	
	Tweseldown	

4. Monitoring Service

SANG and SPA Monitoring

4.1. The SAMM Project incorporates elements of monitoring for the overall mitigation approach. This includes monitoring the visitors to the SPA to indicate visitor numbers and provide information on topics such as where visitors come from, what the main purpose is of their visit and their method of transport to get to the SPA. These SPA surveys have been carried out in 2005¹³, 2012/2013¹⁴ and 2018¹⁵ and the results are presented in associated reports. More details on the surveys can also be found in the SPA Visitor Distribution and Access Background Paper. Common findings from the SPA visitor surveys include:

- A consistently high proportion of visitors giving the main reason for their visit as dog walking and a large proportion of visitors being accompanied by a dog.
- A high proportion of dog walkers will let their dog off the lead on the SPA.
- Dog walkers give high value to being able to let their dog off the lead.
- The majority of visitors travel less than 5km to get to the visited site, but there is evidence that some are willing to travel further.
- The typical distance walked is between 2-2.5km.
- There is evidence of people using a network of sites.

4.2. A large proportion of visitors to the SPA arrive by car so coordinated counts of the number of cars parked at sites can give an indication of the overall number of visitors. Vehicle counts have been completed almost yearly for the SPA since a trial in 2012, although methods have varied which can affect the ability to reliably compare data. The survey usually involves driving fixed transects simultaneously around the SPA over a two-hour period, counting the vehicle numbers in formal and informal parking locations. Recent surveys show a high use of the

¹³Liley, D., Jackson, D. & Underhill-Day, J. (2005) *Visitor Access Patterns on the Thames Basin Heaths*. English Nature Research Report 682, Natural England Commissioned Report 136

¹⁴Fearnley, H. & Liley, D. (2013) *Results of the 2012/13 visitor survey on the Thames Basin Heaths Special Protection Area (SPA)*

¹⁵EPR (2018) *Visitor Access Patterns on the Thames Basin Heaths SPA. Visitor Questionnaire Survey 2018*

larger car parks, e.g. The Lookout, which is reflected in both footfall and vehicle count surveys¹⁶¹⁷.

- 4.3. There are 36 automated people counters positioned on access points across the SPA. This gives a high level of detailed data on visitor numbers 24 hours a day and 7 days a week, without the requirement for fieldwork which would involve a prohibitive amount of staff time. Recent data indicates that some sites, e.g. Shore’s Road, have consistently high visitor numbers at all times of year¹⁸.
- 4.4. SAMM wardens also undertake SANG surveys, which monitor numbers using the site and survey visitor information. This information is analysed and consolidated in to reports for the JSPB. Further information on SANG surveys can also be found in the SANG Background Paper report. For sites within, or partly within the HMA, surveys have been undertaken on the following SANGs.

Surrey Heath	Hart	Rushmoor
Chobham Water Meadows	Dilly Lane / QE 2 Fields	Rowhill Nature Reserve
Heather Farm	Crookham Park	Southwood Woodland
Chobham Place Woods	Shepherd Meadows	Hawley Meadows (areas also in Surrey Heath & Hart)
Bisley Common	Swan Lake Park	

¹⁶ C. Panter (2017) *Analysis of 2017 Thames Basin Heaths SPA Parking Transects & Counter Data*

¹⁷ EPR (2018) *Visitor Access Patterns on the Thames Basin Heaths SPA. Visitor Questionnaire Survey 2018*

¹⁸ EPR (2018) *Visitor Access Patterns on the Thames Basin Heaths SPA. Visitor Questionnaire Survey 2018*

5. Education and Communication Service

- 5.1. The overall aim of the education and communication programme is to promote the Thames Basin Heaths Partnership's key themes around responsible use of the heathlands, set around the primary message of raising awareness of the three rare ground-nesting birds (nightjar, Dartford warbler & woodlark) and potential issues with disturbance. The education programme seeks to engage school children and community groups with their local heathlands by learning about the species that live there, what the threats to them are and what they and their families can personally do to protect them.

Education

- 5.2. An Education and Engagement Officer was appointed in October 2018. A plan of action for this work area has been formulated and includes four key strands:
1. The creation and piloting of a curriculum-linked heathland focused education programme, with sessions that children can access in school (both in the school grounds and in the classroom) and out on the heath. Initially, this has started at primary level and links in with a range of National Curriculum themes across Key Stage 1 and 2. It mainly focuses on science and covers topics such as classification, adaptation and caring for the environment.
 2. Investigation into and planning of wildfire sessions (in consultation with local fire services) to reduce the incidence of heathland fires on the SPA. A standalone assembly and a session deliverable in PHSE lessons (both aimed at Year 8) are being advertised to schools. There is ongoing work taking place to link with the fire service and partners to facilitate joint delivery and avoid duplication of effort. Partners have been encouraged to identify schools that might particularly benefit from these sessions. All other curriculum-linked heathland sessions also include wildfire topics (causes, damage and what to do if you discover a fire).
 3. Using the 2019 'Year of Green Action' to promote use of alternative greenspaces and encourage communities to get involved in connecting with, protecting and enhancing their local environment. This includes promoting volunteering opportunities with partners via a new webpage and promotional blogs in an effort to boost numbers of those helping with conservation tasks. An outdoor yoga session was also run at Farnham Park to encourage people to use their local greenspace.

4. Scoping out opportunities to engage community groups with their local heathlands to encourage them to value them and want to look after them. This includes groups for all ages, linking in with uniformed group badges and investigating the possible creation of a heathland-focused John Muir Award, in collaboration with partners.
- 5.3. During the pilot phase of the curriculum-linked education programme, links have been successfully forged with teachers and students at five local primary schools in the areas adjacent to Wildmoor Heath and Horsell Common. A number of sessions, both in schools and out on the heath have been delivered across Key Stages 1 and 2, covering a range of topic areas. With the support of the Education and Engagement Officer, a Year 3 class teacher at Wildmoor Heath School dedicated a full topic to learning about heathland.
- 5.4. Whole school assemblies, a multi-activity day, lunchtime nature clubs and guided walks on the heath have also been delivered for schools. Links have also been developed with secondary schools and a sixth-form. Overall, 18 school sessions were delivered from June to December 2019 as part of the pilot. 19 sessions were delivered in the first quarter of 2020, with positive feedback and demand for further sessions.
- 5.5. It is planned to roll-out the programme more widely (when Covid-restrictions allow) and an education section on the website will be launched in 2020. A multitude of resources (lesson plans, presentations, worksheets and reference materials) have been created to support the delivery of the education sessions and a range of these are now available on the TBH Partnership website¹⁹.
- 5.6. Heathland education for community groups has also been planned and delivered, following creation of sessions to target different groups and engage them with their local heathlands. Working with various groups, the Education and Engagement Officer has trialled different sessions. 21 sessions have been delivered to seven different community groups; Guides, Beavers, Scouts, LinkAble group, the National Citizen Service group, an RSPB Wildlife Explorers group and a U3A group. Activities have included outdoor learning sessions, litter picks,

¹⁹ Thames Basin Heaths Partnership. *Activities and Resources*. Online at:
<https://www.tbhpartnership.org.uk/activities/>

practical tasks and guided walks with a theme of learning about and protecting the heaths or connecting people with their local greenspaces (SANGs).

Communication

- 5.7. SAMM project communication tools include a dedicated website (www.tbhpartnership.org.uk). This is used to promote key messages and the content is designed to inform and inspire visitors about their local heathlands (including how to use them responsibly), to find out more about the wildlife in the local area and to promote usage of alternative greenspaces.
- 5.8. The website includes a blog, which the SAMM wardens use to communicate a wide variety of topics, including information on heathland wildlife, articles on preventing and reporting wildfire, conservation grazing, contributing to citizen science projects and school sessions. The project also communicates and actively spreads key messages using social media, including a Facebook page and Twitter account, with 814 and 536 followers respectively (at April 2020). In February 2020 an Instagram account was also created with 144 followers as of April 2020. This communication method includes participating in campaigns, such as the Wildlife Trust's #30DaysWild campaign.
- 5.9. In May 2019, the first quarterly Thames Basin Heaths Partnership Newsletter was published. The aim of this web-based newsletter is to allow partners to disseminate information, celebrate achievements, request assistance, share knowledge and promote events.

Promotion of SANGs

- 5.10. Part of the role of the SAMM Project is to promote and share information on SANGs across the SPA. A map-based web directory is available where residents can search for alternative greenspaces to visit (<https://www.tbhpartnership.org.uk/sites/>). Each site is publicised with a description, details of walking routes and facilities available, directions and a photo gallery.
- 5.11. In addition, a SANG booklet has been produced which lists the location of all the SANGs available and the amenities available at each. The booklet has continued to gather positive feedback with many residents making a deliberate effort to visit as many of the SANGs as they can. This booklet is also available as an online PDF document.

Heathland Hounds

- 5.12. The project team engage with dog walkers through a dog owner focused initiative, known as Heathland Hounds.
- 5.13. The initiative is used to encourage responsible behaviour on the SPA and promote alternative greenspaces and also includes a dedicated Facebook group with over 1,000 members. Posts to this group include information on responsible dog walking (on and off the SPA), promotion of SANGs, guided dog walk meet-ups, relevant information from partners, as well as more general information about dogs and dog ownership. The group continues to be increasingly interactive, with a number of members actively posting about visits to alternate greenspaces.
- 5.14. As part of the Heathland Hounds initiative the team has assisted partners with their events. These have included leading guided dog walks on SANGs at Wellesley Woodlands and Ash Green Meadows (Blackwater Valley's Dog Day) and one at Edenbrook Country Park with Farnham Walkie Talkies.

Further Research

- 5.15. To ensure that the aims and objectives of the SAMM project are communicated as effectively as possible, Natural England's Behavioural Insights Team will be carrying out a controlled trial to research the most effective language and means to effect behaviour change and spread the project's key messages. The information gathered during this trial will then be used to determine how future messages and communications work should be framed to ensure that they have the maximum impact possible.

6. Further Work

- 6.1. This report has given information on the SAMM Project to establish what is currently being delivered, how the project works, and to assist in identifying any opportunities for delivering alternative, or complimentary mitigation through access management.
- 6.2. The research indicates that some areas of SAMM delivery are already adapting and enhancing over time, as lessons are learnt and progress is made in building partnerships and expanding the team's knowledge and experience. However, overall the project must currently work within its defined budget to deliver the previously agreed mitigation as part of the legal agreement set out in appendix 2.
- 6.3. Investigating whether there are opportunities to further enhance the SAMM offer, to provide effective additional SPA mitigation, including through the potential provision of additional funding, will be a key part of the Access Management Research Study.
- 6.4. The Access Management Research Study will further explore two options which would expand on elements of the existing SAMM project. These are:
 - Potential for expanding the wardening service of the existing SAMM project; and
 - Potential for expanding the education and communication service of the existing SAMM project.
- 6.5. These options will be investigated and then reviewed with all of the other mitigation options within the final Project Report. This report will draw conclusions on the potential options and set out recommendations for implementation and/or further work.

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Appendix 1 – SAMM Tariff Guidance

1. Background

- 1.1 The Thames Basin Heaths Special Protection Area (TBH SPA) covers over 8,400 hectares of Sites of Special Scientific Interest (SSSI) within Berkshire, Hampshire and Surrey. A 5km boundary extended around the SPA involves significant parts of eleven local authorities, with four further authorities containing only very small areas. The SPA is designated for breeding populations of Dartford warbler, nightjar and woodlark, which are protected species under the EC Wild Birds Directive (Council Directive 2009/147/EC on the conservation of wild birds).
- 1.2 SPAs are protected in UK law by the Habitats Regulations (2010). Under the Habitats Regulations, development proposals must not give rise to adverse effects on the integrity of the SPA, either alone or in combination with other plans and projects, and if they are likely to, measures must be secured to remove this impact, otherwise the Competent Authority is obliged to refuse permission (subject to the exception tests set out in Regulation 62).
- 1.3 Housing delivery will lead to a significant rise in population within the boroughs and districts around the Thames Basin Heaths SPA. Investigations of the visitor patterns of current residents around the SPA have shown that it is likely that this new population will also use the SPA for recreation. Both local evidence and that from other areas has demonstrated the damaging effects of human disturbance (and people with their dogs) on the three heathland bird species. Without appropriate and proportionate avoidance and mitigation measures, this will damage the populations of these birds breeding within the SPA, and would be contrary to the Habitats Regulations.
- 1.4 Due to the large number of local authorities involved and the cumulative nature of the impacts (a result of many individual housing applications), a co-ordinated approach to the mitigation has been necessary. The Thames Basin Heaths Joint Strategic Partnership Board (JSPB) has been set up to provide the vehicle for joint working between local authorities and other organisations responsible for protection of the Thames Basin Heaths SPA. The JSPB includes Member representation for each affected Local Authority together with a number of stakeholders.

2 Thames Basin Heaths SPA mitigation and avoidance measures

- 2.1 In February 2009 the JSP Board endorsed a strategic Delivery Framework. This recommends a combination of two avoidance and mitigation measures to protect the Thames Basin Heaths from the impacts of new residential development:
 - The provision of Suitable Alternative Natural Greenspaces (SANG)
 - Strategic Access Management and Monitoring (SAMM) measures
- 2.2 Research undertaken to assess the impact of visitors on the SPA showed clearly that individual visitors use a number of the component sites. Delivery of the access management and

monitoring measures requires strategic joint working by all the affected Local Authorities and other SPA landowners and managers, in order to avoid displacing visitors from one part of the SPA to another.

- 2.3 The Review of the evidence for Natural England's initial delivery plan considered that a coordinated SPA-wide ranger service was required to ensure that improvements at one site did not adversely impact others. The Review also emphasised the importance of establishing effective monitoring of both visitors and the SPA bird species in order to understand the effectiveness of mitigation. The Delivery Framework reflects the established research by requiring that mitigation be provided by both SANGs and strategic access management and monitoring together.

3 Strategic avoidance measures

- 3.1 In June 2009 the JSPB agreed an Outline Business Plan which identified the resources required to provide an effective SAMM project, together with the overall cost of providing strategic mitigation. As with SANGs, the work would be funded by contributions from all new additional residential dwellings within 5km of the SPA. SANGs are funded by tariffs collected individually by each local authority and the JSPB endorsed the principle of a separate single tariff to fund SAMM measures in perpetuity. This would be collected centrally and used strategically across the SPA.
- 3.2 The Outline Business Plan included a team of wardens and detailed monitoring of both visitors and the SPA birds. The tariff provided for both annual revenue expenditure and the creation of an investment fund for the long term.
- 3.3 The Strategic Access Management and Monitoring Board has been established by the JSPB in order to provide an overview of the SAMM project. The SAMM Board consists of local authority members and Natural England, advised by key land managers responsible for SPA sites including the MoD and Forestry Commission.

4 Tariff

- 4.1 The tariff was set at £630 per dwelling and it was agreed that Local Authorities should seek to endorse this tariff and implement mechanisms to collect it by October 2009. The tariff would be collected by an Administrative Body (Hampshire County Council) and the delivery managed by Natural England. The sum provides for £190 towards annual expenditure and £440 to the long term investment fund.
- 4.2 The tariff was established with reference to the anticipated increase in population and a detailed analysis of the resources which would be needed to address the increased number of visitors to each part of the SPA. An estimate of the number of houses (2,824 per year over 17 years) was taken from the South East Plan and the cost of access measures and monitoring calculated in consultation with a wide range of organisations delivering similar services. Table 1 provides a summary:

Table 1: Calculation of £630 per dwelling

	Annual Cost	
Staff and wardening service	£390,000	See Appendix 3 for details of expenditure
Monitoring inc capital costs	£55,500	
Contingency	£43,900	
Administrative body fees	£20,000	
Natural England management fee	£10,000	
VAT contingency*	£17,160	
Total cost	£536,560	
Revenue funding per house	£190	Est. 2,824 houses/yr yielding £536,560
Capital investment per house	£440	See Appendix 2
Total average tariff per house	£630	
Notes		
The approach to rounding reflects the original calculations conducted by a number of individuals. This has been replicated to maintain consistency with previously published and agreed documents. The level of variation in the figures is not significant.		
* VAT on all monitoring and capital costs; plus part of wardening costs.		

- 4.3 Following discussions with the local authorities a legal opinion was jointly sought to establish whether the proposed tariff was compliant with Circular 05/2005. An opinion was received from David Elvin (Landmark Chambers) which concluded that the tariff did meet the requirements of the Circular except in regards to being a flat rate tariff. The opinion considered that a flat rate tariff would not be proportional and would fetter the local authorities' discretion.
- 4.4 The opinion also stated that a tariff which included the number of bedrooms and/or distance would be proportionate and acceptable. The current Thames Basin Heaths SANG and SAMM tariffs take account of distance through the current distance zoning scheme.
- 4.5 In response, Natural England and the local authorities agreed a proportional tariff based on the number of bedrooms. A tariff developed using these guidelines is considered to meet all the requirements of current policy guidance and, in conjunction with SANGs, will be able to provide effective mitigation to address the impact of additional housing on the SPA.
- 4.6 The legal opinion states that the tariff can be established by reference to the overall sum needed to deliver the required mitigation. The overall sum required was established by the SAMM Outline Business Plan and has been agreed by the local authorities and Natural

England. The best available figures are used throughout for calculating the tariff and local authorities are expected to use local data wherever appropriate.

5 Calculation of contribution

- 5.1 The proportional tariff is calculated using a simple equation based on occupancy and a per capita Standard Cost. The standard cost is derived from the overall sum required and the number of new residents. In order to ensure that the scheme is fit for purpose, the TBH SAMM tariff includes an enabling adjustment, which provides confidence that the overall income will be sufficient to ensure that the SPA is not adversely affected.

$$\text{Tariff} = (\text{Occupancy} \times \text{Standard Cost}) + \text{Enabling Adjustment}$$

- 5.2 Table 2 provides an estimate of the per capita contribution required to provide the overall sum. The enabling adjustment is obtained by including data on the predicted mix of house size.

Table 2: Overall costs

Number of dwellings	2,824	Forecast delivery within 5km of SPA
Original revenue	£536,560	Annual sum required for mitigation
Original investment	£1,242,560	Invested into long term fund
Original total	£1,779,120	Investment + revenue, total required annually
Original tariff	£630	$£1,779,120 \div 2,824 = £630$ per dwelling
Occupancy	2.4	Agreed figure used in the Delivery Framework
Total no. Residents	6,778	$2,824 \times 2.4$ (No. dwellings x Occupancy)
Standard Cost	£263	$1,779,120 \div 6778$ (Total sum ÷ No. residents)

- 5.3 Table 3 shows an example of a proportional tariff scale for the TBH SAMM project. The scale uses average figures for occupancy and housing sizes obtained from a number of the relevant local authorities. Appendix 2 details the calculations and provides background data.

Table 3: Example SAMM tariff

No. of bedrooms	Recommended tariff
1	£399
2	£526
3	£711
4	£807
5	£1,052

- 5.4 Where possible local authorities should use local data for occupancy and distribution of house sizes. The information should be recent and reflect experience of market delivery rather than housing need.

6 Collection of the tariff

- 6.1 The SAMM tariff is collected by local authorities, normally upon commencement of the development. Within the TBH area, Hampshire County Council will act as the Administrative Body and provide banking services. The service will be delivered by Natural England and any other body which may be employed by Natural England. A legal contract agreed between the local authorities, Hampshire County Council and Natural England defines the roles and responsibilities of each of the partners and establishes a structure for the funds to be managed.
- 6.2 Information on planning applications and commencements will be provided by planning departments to ensure that there is proper control of the finances. Hampshire County Council will provide an independent annual audit of both investment and annual budgets. The SAMM Board will meet regularly to agree the budget and priorities, and formally report to the JSPB.

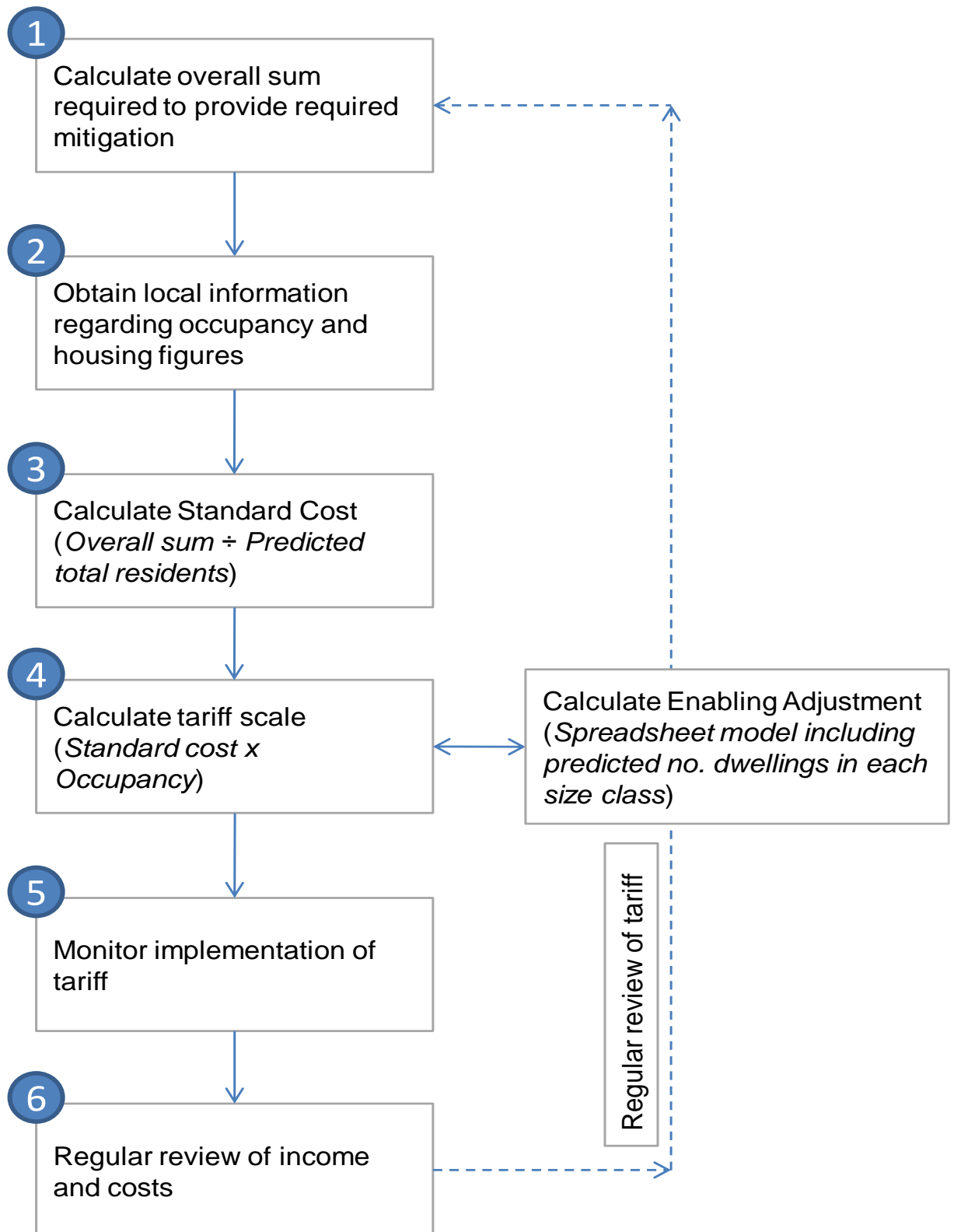
7 Review of the tariff

- 7.1 Detailed records will be kept of all SAMM expenditure and resource allocation so that local authorities will be able to monitor expenditure within their local areas. Combined with detailed monitoring of visitors and the SPA bird species, this will provide clear information on the effectiveness of the SAMM project and SANGs.
- 7.2 The SAMM tariff will be reviewed regularly and initially within the first two years of adoption. The first review will take account of the uncertainties introduced by the change in the tariff system, delay in implementation and current economic climate.

8 Implementation of tariff

- 8.1 The methodology described here provides a mechanism for calculating a tariff which is considered to meet the requirements of national policy and reliably provide the requisite level of mitigation.
- 8.2 It is not obligatory to use this tariff methodology when providing strategic mitigation. In agreement with Natural England, local authorities are entitled to use a different methodology or undertake Appropriate Assessments of individual developments which are able to provide a suitable alternative SPA-wide avoidance strategy.

Appendix 1 – Flow chart of process



Appendix 2 – Details of TBH SAMM tariff calculation

9 Calculation of tariff

9.1 Details of how information about occupancy and house sizes are used to generate a proportional scale of tariffs providing the required total sum are shown in the following sections.

$$\text{Tariff} = (\text{Occupancy} \times \text{Standard Cost}) + \text{Enabling Adjustment}$$

$$\text{Tariff} = (\text{Occupancy} \times \text{£263}) + 8\%$$

10 Occupancy

10.1 Occupancy figures have been obtained from a number of sources and used to calculate example estimated average figures.

Table 4: Occupancy figures

Dwelling	Waverley ¹	Hart ²	Elmbridge ³	Woking ⁴	Wokingham ⁵
1 bedroom	1.31	1.3	1.2	1.4	1.29
2 bedroom	1.76	2.42	1.8	1.9	1.68
3 bedroom	2.51		2.5	2.5	2.17
4 bedroom	2.86	3.5	2.8	2.9	2.9
5 bedroom +	3.73		3.6		3.48

[1] Surrey wide data.
 [2] Figures correspond with North East Hampshire Transport Strategy.
 [3] Survey work by Surrey County Council and accepted in 1998 by the Local Plan Inquiry Inspector.
 [4] Census 2001.
 [5] Wokingham BC 2003.

Occupancy figures used in tariff calculations		
Dwelling	Occupancy	Tariff (Occupancy x £263)
1 bedroom	1.40	£369
2 bedroom	1.85	£487
3 bedroom	2.50	£658
4 bedroom	2.85	£747
5+ bedroom	3.70	£974

Average occupancy figures have been selected on a precautionary basis.

11 Housing stock

11.1 The size of future housing stock has been obtained from a number of sources and used to provide example average figures for future delivery

Table 5a: Housing Stock

No. of bedrooms	Guildford	Waverley	Woking	Hart	Rushmoor	Surrey Heath	Average
1	12%	18%	19%	10%	10%	10%	13.1%
2	41%	42%	28%	30%	50%	40%	38.6%
3	29%	19%	39%	35%	20%	40%	30.4%
4+	17%	21%	14%	25%	20%	10%	17.9%

Guildford, Waverley and Woking; West Surrey Strategic Housing Market Assessment 2009
Hart, Rushmoor and Surrey Heath; NW Surrey and NE Hampshire Strategic Housing Market Assessment 2008

Table 5b: Housing Stock: Average % used in SAMM tariff

Number of bedrooms	Overall
1	13%
2	39%
3	30%
4	12%
5+	6%

10. Enabling Adjustment

10.1. The Enabling Adjustment is required to ensure that the proportional tariff provides an average approximating £630 regardless of the mix of housing and local occupancy figures. Using the average figures, the required adjustment is 8%, calculated using a simple spreadsheet model.

Table 6: Tariff including Enabling Adjustment at 8%

No. bedrooms	Occupancy	Tariff	% dwellings	No dwellings	Income generated
1	1.40	£399	13%	367	£146,433
2	1.85	£526	39%	1101	£579,126
3	2.50	£711	30%	847	£602,217
4	2.84	£807	12%	339	£273,573
5+	3.70	£1,052	6%	170	£178,840
Overall				2824	£1,780,189
Average tariff : £1,780,189 ÷ 2824 = £630					

Appendix 3: Strategic Access Management and Monitoring Project

11 Overall costs

- 11.1 The Strategic Access Management and Monitoring project will secure the employment of a Project Co-ordinator and one Warden initially, and then later (as funds allow) an Education Officer and further warden staff. These staff will work with existing rangers and wardens to provide consistent messages to SPA visitors and promote use of the SANGs.
- 11.2 The project also includes a monitoring strategy which will measure both visitor use (of the SPA and the SANGs) and populations of the three SPA birds to ensure that the avoidance and mitigation measures are functioning effectively to avoid any adverse impact of development on the bird populations.
- 11.3 The SAMM project will provide a presence on all sites comprising the SPA but will focus resources according to clear priorities. The priority sites will be those where it is possible to have the greatest influence on visitor behaviour and appreciation of the SPA.
- 11.4 The tables below provide further information on the roles and costs of the staff. In the early years of the project the income will increase slowly and the project will develop in stages. Establishing baseline visitor information and monitoring changes in visitor patterns will be a priority, together with continuing the long term monitoring of the SPA birds. Staff will be employed flexibly with a gradual increase in numbers.

Table 7: SAMM project annual costs

Item	Cost*	Notes
Natural England	£80,000	Staff costs
Wardening	£310,000	4 full time and 10 seasonal wardens
Monitoring	£49,000	See monitoring strategy proposal
Subtotal	£439,000	
Contingency @ 10%	£43,900	
Natural England costs	£10,000	
Hampshire CC finance	£20,000	Costs associated with Treasurer function
Establishment costs	£6,500	Capital costs over 16 years
VAT contingency	£17,160	
Overall	£536,560	
*Revised costs derived from Outline Business Plan and Monitoring Strategy.		

Table 8: Capital Fund

Based on the following assumptions the Capital Fund would be continuing to grow whilst covering the full estimated annual costs.										
Income										
<ul style="list-style-type: none"> • The Tariff will initially average £190 and £440 per dwelling. • The Tariff will be reviewed as a priority to ensure that housing and cost assumptions are as accurate as possible. • A 10% increase in tariff takes place in 2011/12. • The tariff subsequently increases every 5th year by 15%. • Interest rates based on interest yield market projections are: <table style="margin-left: 40px; border: none;"> <tr> <td style="padding-right: 20px;">2010/11</td> <td>0%,</td> </tr> <tr> <td>2011/12</td> <td>1%,</td> </tr> <tr> <td>2012/13</td> <td>2%</td> </tr> <tr> <td>2013/14</td> <td>3%</td> </tr> <tr> <td>2014/15 onwards</td> <td>4%</td> </tr> </table> • The Administrative Body will pay a rate of interest of Base Rate -0.5% where the Base Rate is above 0.5%. Where the Base Rate is 0.5% or below then no interest will be paid. • Once the fund has reached an appropriate size (to be directed by the JSPB) then an independent adviser will be engaged to manage the long term fund. It will be important to maximise the return on investment in accordance with the JSPB investment and risk appetite. The increase in return and the costs associated with engaging an independent adviser have been excluded at this time. • Interest rates applied in the calculation are: 2010-11=0, 2011-12=0.5%, 2012-13=1.5%, 2013-14=2.5%, 2014-26=3.5%, 2026 Onwards 4%. 	2010/11	0%,	2011/12	1%,	2012/13	2%	2013/14	3%	2014/15 onwards	4%
2010/11	0%,									
2011/12	1%,									
2012/13	2%									
2013/14	3%									
2014/15 onwards	4%									
Costs										
<ul style="list-style-type: none"> • The cost estimates used have been revised estimates of activity provided by Natural England to reflect the revisions to the build forecasts. Based on likely public and industry sector knowledge costs have not been inflated until they reach the full cost level at year 10 in 2018-19. • Inflation applied from 2018 onwards is set at the Bank of England target level of 2%. 										

Table 9: Predicted costs of actual delivery of wardening service

	Cost	Note
Full time staff		
Salary inc additional costs	£30,800	Annual
Equipment, transport, accommodation	£10,824	
Total	£41,624	
Total cost - 4 staff	£166,496	
Seasonal staff		
Salary inc additional costs	£11,178	For period March - September (25 weeks)
Equipment, transport, accommodation	£2,959	
Total	£14,137	
Total cost – 10 staff	£141,370	
Overall wardening cost	£307,866	

Table 10: Detailed monitoring costs

Capital item/initial costs	Cost
Installation of 80 pressure mat counters	£55,000
Initial visitor numbers and questionnaire surveys with analysis across the SPA/SANGS	£40,000
Contingency 10%	£9,500
Total Capital Costs	£104,500
Annual cost over 16 years (rounded down to nearest 100)	£6,500
Annual costs	
Full Visitor Survey on the SPA after 5 years (collected per annum)	£10,000
Annual maintenance of pressure counters	£3,000
Fire recording, collation and storage	£2,000
Site capacities initial survey and analysis	£13,000
Collation and storage of records (planning, visitors, birds surveys, incidents, SANGs etc	£12,000
SPA bird surveys	£5,000
Car park counts analysis	£2,000
Household postal survey on open space usage	£2,000
Total annual costs	£49,000

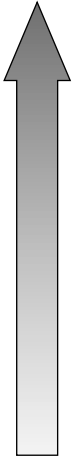
12. Staff roles and project priorities

12.1. The mitigation provided by the SAMM project is entirely additional and complementary to existing resources which are already working on the SPA. The SPA Rangers will be focussed on managing visitors and access together with monitoring visitors and access. The following tables provide an indication of the roles of the staff and priorities.

Table 11: Roles of SAMM project staff

Project coordinator
i. Overall coordination of TBH project.
ii. Management of budget.
iii. Line management of staff.
iv. Coordination and analysis of survey information.
v. Production of reports and liaison with local authorities.
Education and Communication Officer
i. Coordinating interpretation and educational materials.
ii. Providing information and educational resources to local authorities and partners.
iii. Volunteer co-ordination for bird surveys, car park counts and evaluating potential for using volunteers and/or wardening service for visitor questionnaires in the future.
Wardens
i. Raising awareness amongst visitors of the importance and sensitivity of the SPA.
ii. Encouraging visitors to behave responsibly on the SPA.
iii. With existing land managers, assessing visitor infrastructure and focussing on the practical experience of visitors to identify on the ground improvements.
iv. Promoting alternative recreational areas, including SANGS.

Table 12: Budget priorities

Priority	Monitoring	Staffing	Other
	SPA wide visitor survey	Project coordination	SPA identity
	Regular visitor counts		Volunteer involvement
	Annual bird monitoring		
	Pressure pads	Full time wardens	
		Seasonal wardens	Educational material
	Postal surveys	Education & communication officer	Interpretation

Appendix 2 – SAMM Legal Agreement

SCHEDULE 3

Thames Basin Heaths SPA Strategic Access Management and Monitoring Project

Project background

This project will deliver one of the two component measures required to avoid and mitigate against the impacts of housing development on the Thames Basin Heaths Special Protection Area (SPA). It will provide a strategic visitor management and monitoring service across the SPA, funded by a Section 106 tariff per net additional dwelling collected by affected Local Authorities. This service will provide an additional complement of full time and seasonal wardens to support and supplement mechanisms already in place to direct and educate users of the SPA, and contribute to a reduction in disturbance. Implementation of a monitoring strategy will provide assurances to developers that their financial contribution is being spent appropriately and that the agreed measures are effective. A strategic SPA-wide access management and monitoring programme is required, in perpetuity, by the South East Plan Policy NRM6: Thames Basin Heaths SPA.

Part 1

Objectives

1. Working in partnership, the overall aim of the Strategic Access Management and Monitoring Project is to protect the SPA from recreational pressures arising from new housing development through education (both on and off site), guidance, and promoting the use of Suitable Alternative Natural Greenspace (SANG) sites.
2. Objectives
 - i. Finalising and securing implementation of mechanism for collecting developer contributions from Local Authorities and redistributing them to the Project;
 - ii. Promotion of new access opportunities for local people (SANGs);
 - iii. Monitoring of Planning Permissions granted;
 - iv. Monitoring of visitor use of SANGs and SPA;
 - v. Monitoring of Annexe 1 birds on SPA sites;
 - vi. Analysis and reporting on monitoring data;
 - vii. Provision of an SPA-wide on-the-ground wardening service to support and supplement existing management mechanisms;
 - viii. Provision of an education programme;
 - ix. Appropriate branding of strategic access management;

- x. Creation of new volunteering opportunities (within the monitoring process);
- xi. Demonstration of best practice for strategic access management of visitors and visitor infrastructure, particularly where the supply of open space is heavily dependent on protected areas.

Part 2

Operations

- 1 Phase 1 will involve setting up the project and Phase 2 will involve developing operational delivery gradually in subsequent years.
- 2 Phase 1 (to be carried out by the Project Co-ordinator):
 - i. Overseeing production of legal agreement defining funding arrangements and relationships between the 11 Local Authorities, Hampshire County Council, and Natural England as the delivery body.
 - ii. Finalising the Business Plan.
 - iii. Writing specification for the wardening plan.
 - iv. Writing job description for the Education and Communication Officer post.
 - v. Writing draft Communication and Engagement Plan.
 - vi. Once funds available, appointing Education and Communication Officer and wardening service.
- 3 Phase 2 will see the implementation the Strategic Access Management and Monitoring service which consists of:
 - i. a wardening service
 - ii. a monitoring service
 - iii. an education and communication service
 - iv. a facilitation role

3.1 Wardening service

This is an additional on-the-ground presence to the existing wardening resources on the SPA (which need to be maintained at existing levels to cope with existing pressure). The additional wardens will integrate with existing management teams to deal with pressures arising from new residents, and their primary roles will be:

- a) Raising awareness amongst visitors of the importance and sensitivity of the SPA;
- b) Encouraging visitors to behave responsibly on the SPA;
- c) With existing land managers, assessing visitor infrastructure and focussing on the practical experience of visitors to identify on-the-ground improvements;
- d) Promoting alternative recreational areas, including SANGs.

3.2 Monitoring Service

Key elements of the monitoring strategy specifically within the framework of this proposal will be delivered by:

- a) Natural England Project Co-ordinator: Responsible for Annual Reports, financial reporting on monitoring expenditure, commissioning key items of work, co-ordinating analysis in partnership with the Surrey Biodiversity Information Centre of surveys, data, etc.
- b) Natural England Education and Communication Officer: Volunteer co-ordination for bird surveys, car park counts and evaluating potential for using volunteers and/or wardening service for visitor questionnaires in the future.
- c) Surrey Biodiversity Information Centre – Receives data on planning permissions and S106 agreements, visitor surveys and numbers (from pressure pad counters), bird data. Carries out data analysis in consultation with the Project Co-ordinator.
- d) Wardening Service – Includes monitoring changes in visitor behaviours, working with land management organisations to install visitor counters, recording incidents, car park counts, working with volunteers.

3.3 Communication and Education Service

Supporting the on-the-ground work of the wardens to help people fully understand, value and respect the natural history of the SPA and encourage them to take action to conserve and enhance it. It will establish a project identity and relationships with key organisations (including local authorities, Wildlife Trusts, Forestry Commission, The Crown Estate), including a volunteer network and partnerships with schools and communities (police, fire service, etc.).

3.4 Facilitation role

Enabling the land managers to work together to share resources and best practice co-ordinated through the Access Management and Monitoring Partnership.