

**THAMES BASIN HEATHS
JOINT STRATEGIC PARTNERSHIP BOARD**

Date: 21 October 2008

Subject: Proposal for Access Management and Monitoring on the Thames Basin
Heaths SPA

Report of: Natural England

Recommendation:

That the Board accepts:

1. Natural England's proposal for delivering Access Management and Monitoring and recommends this to their Authorities.
2. Decides on membership of a Project Board to agree the details of the Memorandum of Agreement and associated Service Level Agreements inline with the suggested timetable.

Purpose of the Report:

This is Natural England's proposal for the delivery of access management and monitoring of the Thames Basin Heaths Special Protection Area.

1. Introduction:

- 1.1 Following the last paper on Access Management in June 2008 (Agenda item 5), the JSPB formally approached Natural England to ascertain, whether the organisation was in a position to take on the role of managing developer contributions for strategic avoidance measures and co-ordinating the delivery of these measures.
- 1.2 The suggestion that Natural England undertook this role has been put forward by a number of stakeholders (Local authorities) as well as members of the Access Management Partnership.
- 1.3 Natural England's proposal described here is a collaborative approach to delivery in partnership with Hampshire County Council, The Wildlife Trusts and Bracknell Forest Borough Council and the funding bodies (Local Authorities).

2. The proposed service

- 2.1 The Access Management and Monitoring Proposal provides the following four elements:

- 2.1.1 A wardening service: This is an additional on the ground presence from existing land managers on the SPA. The wardens' primary roles will be:
- (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 SANGS¹.
- 2.1.2 Monitoring: Delivering key elements of the monitoring strategy specifically within the framework of this proposal, the following roles:
- (i) Natural England Project Manager: Responsible for Annual Reports, financial reporting on monitoring expenditure, co-ordinating analysis in partnership with the Surrey Biodiversity Information Centre (SBIC) of surveys, data etc, works with land management organisations to install visitor counters, commissioning key items of work.
 - (ii) 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.
 - (iii) Surrey Biodiversity Information Centre (on behalf of the Regional Biodiversity Records Centre) – Receives data on planning permissions and s106 agreements, visitor surveys and numbers (from pressure pad counters), bird data. Carries out data analysis with the NE Project Manager.
 - (iv) Wardening Service (Wildlife Trusts and BFBC) – Includes monitoring changes in visitor behaviours, recording incidents, car park counts, working with volunteers.
- See monitoring strategy Appendix 2*
- 2.1.3 Education and Communication: An established project identity and relationships with key organisations. (local authorities, Wildlife Trusts, Forestry Commission, Crown Estates), including a volunteer network and partnerships with schools and communities (police, fire service etc).
- 2.1.4 Facilitation role: Enabling the land managers to work together to share resources and best practice delivered through the Access Management Partnership Action Plan (which sets out a range of training needs to ensure a strategic approach to access management).

3. Governance and control – The management case

- 3.1 Subject to its internal approval process Natural England is in a position to take on the responsibilities for the coordination of strategic avoidance measures in relation to the Thames Basin Heaths SPA. In partnership with Hampshire County Council,

¹ SANGS are Suitable Accessible Natural Green Spaces

this includes managing financial contributions, drawing on HCC's experience in acting as treasurer for other partnership projects.

- 3.2 Natural England will also coordinate the on-the-ground delivery of strategic access management and monitoring in partnership with the Wildlife Trusts and Bracknell Forest Borough Council.
- 3.3 Natural England will establish reporting protocols and lead a Project Board to steer the direction of the project, ensure that objectives and service level are being met and that value for money is being achieved. The board will also approve the annual work programmes for the delivery agents. It is suggested the board meet every six months. The Project Board will be informed by financial information provided by Hampshire County Council. Through its own internal protocols Natural England will also monitor delivery against a project plan and maintain a project overview. It is suggested that the JSPB will act as an Executive Board giving final approval to the reviews and recommendations made by the Project Board.
- 3.4 To implement the governance and reporting protocols, Natural England would seek sign up to one inclusive Memorandum of Agreement (MoA) defining the funding arrangements and relationships between the 11 local planning authorities, Hampshire County Council and the Access Management Delivery Bodies (the Wildlife Trusts and Bracknell Forest Borough Council). This would include two Service Level Agreements with Natural England; one for the funding arrangements agreed with the LPAs and one setting out delivery agreements with the delivery bodies (see standard model Natural England MoA Appendix 2). Figure 1 describes these relationships.
- 3.5 Due to the inevitable fluctuation in income, there will be a phased approach to allocation of funding. It is suggested that LPA contributions are transferred to Hampshire County Council every 6 months. Funds will be allocated to delivery agents in 6 monthly advancements; commencing once enough cash-flow is available.

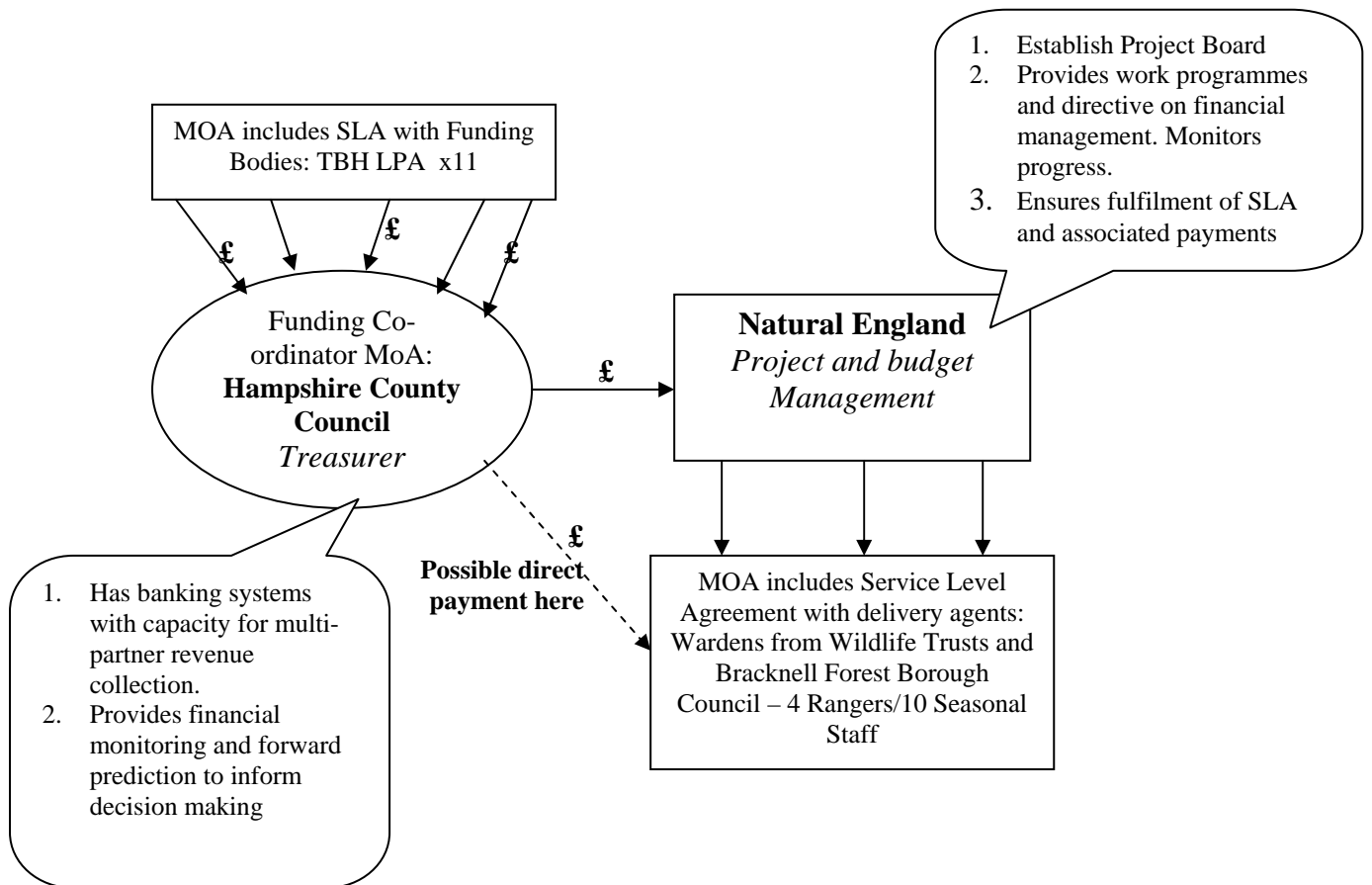


Figure 1. Schematic of proposed financial administration

3.6 Table 1 sets out Natural England’s expectation of the service and responsibility to be delivered by each partner. The level and distribution of the wardening service will vary according to number of houses permitted and the relative distribution across districts and boroughs. The service will also be allocated where pressures on the SPA are greatest. The work programmes for the wardening service will be set on an annual basis.

Table 1. Roles of each partners (subject to negotiation)

Partner	Level of service or responsibility
Natural England	<ul style="list-style-type: none"> • Project manages this approach, including contractual arrangements • Employs Project Manager and Education/Communication Officer • Manages budgets, associated risks and allocations to delivery agents • Co-ordinates delivery of the monitoring strategy • Sets work programmes for delivery agents • Develops access management partnership and facilitates partnership activity • Reports to JSPB and chairs Project Board

	<ul style="list-style-type: none"> Delivers strategic communication and education programme across the SPA and SANGs.
Hampshire County Council	<p>Acts as Treasurer for the project, providing:</p> <ul style="list-style-type: none"> Mechanisms to receive, host and forward tranches of income to Natural England Monitoring of funding contributions from Local Authorities Reports and advises on cash-flow to Project Board Advice on the establishment of financial processes
Wildlife Trusts	<ul style="list-style-type: none"> Wardening service – provided over land leased and/or owned. Also on other land with the agreement of the landowner
Bracknell Forest Borough Council	<ul style="list-style-type: none"> Wardening service – over land leased and/or owned. Also on other land with the agreement of the landowner.
Local Biodiversity Records Centres	<ul style="list-style-type: none"> Through Surrey Biodiversity Information Centre (SBIC), manage the monitoring of TBH with the NE Project Manager Collate and analyse with the Project Manager the outcomes of monitoring. Store data and information.
Local Planning Authorities (including Bracknell Forest Borough Council)	<ul style="list-style-type: none"> Amend strategies to make provisions for contributions to this project Sign-up to negotiated MoA and SLA for payment of assess management tariff Ensure that monitoring and reporting of planning decisions and s106 agreements are reported in a consistent manner to GOSE and that the information is provided. A sub-group to be formed of the officer steering group to make that happen.
GOSE	<ul style="list-style-type: none"> Provides Natural England and Hampshire County Council with 6 monthly house-build details of s106 contributions
SEERA	<ul style="list-style-type: none"> Provide indications of housing allocations per local authority in future years

4. Cost - The Financial case

Table 2. Indicative annual spend to provide full service

Provision	First year costs
Coordination staff (NE)	£80K
Business support (HCC)	£?
Wardening service (full service from 2011)	(i) 4 full time Assistant Rangers @£30k = £120K (ii) 10 Seasonal staff Seasonal Wardens @£19k = £190k
Annual monitoring per year (collation, storage and analysis of Planning Permissions & s106 agreements, visitor numbers to SPA & SANGS, Visitor Behaviour & Attitudes and Bird Survey Data.	£50k per annum*
Monitoring 1 st Year 'one-off' cost;	

1. People Counters	£55k (Capitol costs)*
2. Baseline Visitor Numbers & Analysis for SPA	£40k*
Contingency @ 10%	£54k**
	£589,000

*Explained in Monitoring strategy

** Based on Natural England's projects model, will be reviewed at end of first year

- 4.1 Table 2 sets out the costs to deliver the proposed level of service. Wardening staff numbers are based on calculations and negotiations with Wildlife Trusts. Year one expenditure is calculated at £589K (but this does not include any possible cost recovery from HCC's services). This figure reduces in year two to £494k.
- 4.2 Natural England proposes to recruit a Project Manager and Education/Monitoring Officer to commence 1st April 2009 to establish this service (see Annex 1 for indicative timetable). Natural England is prepared to employ staff in advance of funding becoming available, but will seek to ensure its costs are fully covered over the lifetime of the project.
- 4.3 In the first year (April 2009), the priorities are:
- to implement the baseline monitoring measures identified in the strategy – install visitor counters and record baseline numbers.
 - establish Service Level Agreements with land managers, the warden service providers and the Information Centre and
 - if resources allow, pilot a warden service.
- 4.4 In the second year (from April 2010), if housing targets are being met, the additional wardening service based around 4 full time and 10 Seasonal staff will be in place in addition to the annual monitoring .
- 4.5 If the number of dwellings and hence contributions are below the full allocation in the South East Plan, the Project Board would then agree with the Access Management Partnership the priority areas for wardening (with the warden service providers) based on where most housing was given permission and building commenced and where there is currently high visitor pressure.

5. Risks and issues

- 5.1 If JSP Board does not accept the proposal:
- (i) Access management and monitoring will not progress in a strategic manner and this will limit the opportunity to assess the potential use of Access Management as an avoidance measure for the SPA.
 - (ii) We will lose the opportunity to assess whether Access Management provides an alternative to SANGs and whether the balance between SANGs provision and Access Management could be adjusted.
 - (iii) Without monitoring information it will be difficult to make informed assessments of the impacts of housing allocations and the options for

avoiding impacts, which avoid delay when the South East Plan allocations are reviewed.

- (iv) It will continue to be difficult to assess site specific access management proposals without the context and experience of strategic access management. Site specific proposals would have little or no potential to address the impacts of developments.

5.2 If JSP Board accepts the proposals:

- (i) It will remain necessary to continue through Natural England's internal project and contracts approval procedures.
- (ii) Natural England has limited staff resource to further the development and negotiations of the detailed MoA and SLAs before the Project Manager is in place.

Report of:

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Proposed Timetable

21 st October	TBH JSPB considers the proposal and governance arrangements with NE as managing body for developer funding and service provider.
Dec 08-Apr 2009	Local Authorities amend strategies for developers contributions
January 2009	Appropriate legal/financial agreement between partners established
March 2009	Financial systems established
April 2009	Appoint Natural England Project staff
October 2009	Pilot Warden service
April 2010	Appoint first full wardening service
April 2012	Review contract of NE staff
April 2013-14	Full Review of TBH Access Management & Monitoring Project