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28 November 2017

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 **Thursday, 7 December 2017 at 10.30 am**. The agenda will be set out as below.

Please note that this meeting will be recorded.

Yours sincerely

Karen Whelan

Chief Executive

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#### AGENDA

	<b>Pages</b>
<b>1 Apologies for Absence</b>	<b></b>
<b>2 Minutes of Last Meeting and Matters Arising</b>	<b>1 - 10</b>
To receive the minutes of the Thames Basin Heath Joint Strategic Partnership Board meeting held on 20 July 2017 and note any matters arising.	
<b>3 Strategic Access Management and Monitoring Project Update</b>	<b>11 - 44</b>
To receive a report providing an update on the Strategic Access Management and Monitoring (SAMM) Project.	
<ul style="list-style-type: none"><li>• Annex 1 – 2016 People Counter Data</li><li>• Annex 2 – 2016/17 Visitor Survey Data</li><li>• Annex 3 – SANGS Monitoring Information</li></ul>	
<b>4 Proposed M25/M3 Wisley Interchange Improvements</b>	<b>45 - 46</b>
To receive a verbal update on the impacts that proposed changes to the M25/M3 interchange at Wisley will have on the SPA.	

**5 Financial Report**

**47 - 54**

To receive a report providing an update on the financial position of the Thames Basin Heaths Strategic Access Management and Monitoring (SAMM) project.

**6 Investment**

**7 Any Other Business**

- Natural England's Approach following the Wealden Judgment (Report to a future meeting)

**8 Date of Next Meeting**

**Thames Basin Heaths  
Joint Strategic Partnership  
20 July 2017  
Council Chamber, Surrey Heath Borough Council  
Notes of Meeting**

**Present:**

Board Members

Councillor Brian Adams	Waverley Borough Council
Councillor Moira Gibson	Surrey Heath Borough Council
Councillor David Hilton	Royal Borough of Windsor and Maidenhead
Councillor Mike Goodman	Surrey County Council
Councillor Angus Ross	Wokingham Forest Council
Councillor Chris Turrell	Bracknell Forest Council

Advisory Board Members

Ken Anckorn	Surrey Wildlife Trust
Heather Richards	RSPB
Ann Conquest	Natural England
Miranda Petty	Natural England
Simon Thompson	Natural England
Marc Turner	Natural England
Jennifer Wadham	Hampshire County Council (Finance)

Officers/Observers

Paul Druce	Surrey County Council
Jane Ireland	Surrey Heath Borough Council
Dan Knowles	Guildford Borough Council
Hilary Oliver	Royal Borough of Windsor and Maidenhead
Louise Piper	Rushmoor Borough Council
Gayle Wootton	Waverley Borough Council
Julie Gil	Bracknell Forest Borough Council

**1. Apologies**

- 1.1 Apologies were received from Cllr Graham Cockarill (Hart District Council), Cllr Jonathan Glen (Hampshire County Council), Cllr James Radley (Hart District Council), Cllr Karen Randolph (Elmbridge Borough Council) and Councillor Martin Tennant (Rushmoor Borough Council) plus Richard Ford (Runnymede Borough Council).

**2. Minutes of the Previous Meeting and Matters Arising**

- 2.1 The minutes of the previous meeting, held on 3 March 2017, were agreed as a correct record after the following typographical adjustment:

*Attendance – A correction was noted in the attendance list and*

*subparagraph 2.1 to correctly spell Gayle Wooton's name."*

### **3. Strategic Access Management and Monitoring Report**

- 3.1 SAMM Project Manager – Ann Conquest presented a SAMM update. She reminded Members that Simon Thompson had moved to project manage Natural England's input into the expansion of Heathrow Airport and that she had taken over as SAMM Project Manager in May 2017.
- 3.4 Staffing – 6 full time wardens were supported by seasonal wardens each year. Seasonal wardens had been recruited in March, though a further recruitment had been necessary to fill a post which had become vacant.
- 3.5 Wardening – The project provided for a warden service on the SPA 7 days a week, from 7.30 a.m. to 7.00 p.m. (daylight hours permitting) and a breakdown of wardening activity had been provided for the period January to June 2017.
- 3.6 The data focussed on the total hours, broken down into number of interactions, number of those spoken to who had already had an interaction, leaflets handed out, number of dogs, plus dog walkers with multiple dogs (5+) and the average percentage spoken to.
- 3.7 It was noted that the Autumn and Winter numbers were always lower than in Spring/Summer. Wardening time increases in March each year, with the recruitment of the seasonal staff.
- 3.8 The increase in commercial dog walkers, with 5 or more dogs, was a matter of growing concern, given the difficulties in controlling multiple dogs and the potential for faecal matter to be left on site.
- 3.9 SANGs Visitor Surveys – As part of the monitoring role agreed in May 2016, SANGs surveys had been used at 16 sites during Autumn and Winter 2016/17. The results should have been available for this meeting, but the handover period for the Project Manager had led to a delay and the outcomes would be presented at the next meeting.
- 3.10 Access to Ministry of Defence/Crown Lands – It was reported that the project was still accessing MOD land on an accompanied basis, but that it was likely that access would be agreed to the publically accessible MOD sites. In terms of access to Crown Estate land, a further meeting was scheduled with the Deputy Ranger of the Windsor Estate to try to progress the SAMM project's access to Crown Estate land, but it was still anticipated that access would not be achieved before 2019, when the arrangements between Natural England and Crown Estates are due to be renewed.
- 3.11 Communications, Promotions and Events – Ann Conquest outlined some of the current and proposed projects, highlighting the success of the 'Greenspace on your doorstep' booklet, the Heathland Hounds project and guided walks on the SPA.

- 3.12 There was a slight pause in May and June to the popular SPA Car Park Pit Stops, to cover Purdah requirements in the run-up to County and General Elections, but very successful visits to SPA heathland had been run for children from Pine Ridge and Lorraine Primary Schools.

**Action: Report to next meeting on SANGs Visitors' Survey analysis.**

#### **4. SPA Car Park Update**

- 4.1 The Board considered an analysis of vehicle counts around the Thames Basin Heaths SPA in 2016. The data was collected by the SAMM project and analysed by Footprint Ecology in April 2017.
- 4.2 Counts were carried out on 11 different dates, 6 transects, starting in different locations and done simultaneously, counting vehicles over a 2 hour period. The start time and day was varied over the year to collect data across mornings, afternoons and evenings, as well as weekdays and weekends. Types of vehicles and weather conditions were also recorded.
- 4.3 The evidence supported the Wardens' view that the various sites were more heavily used in the morning. There was a high correlation between the data collected in 2014 and 2016, but direct comparisons were difficult because of the use of different methodologies and resources allocated to the study carried out in 2016.
- 4.4 5,211 vehicles were counted over the period, with an average of 474 per transect, but there were significant differences in usage, in terms of numbers and type thereof, with the highest vehicle numbers being recorded on Broadmoor to Bagshot Woods and Heaths SSSI, whilst the highest recording of commercial dog walkers was on Colony Bog and Bagshot Heath SSSI.
- 4.5 Compared to previous years, there had been relative decreases in use around Bourley/Long Valley, towards the east end of Yateley and at Caesar's Camp. There appeared to have been a relative increase at Lightwater, Ockham & Wisley Common and towards the southern end of Ash to Brookwood Heaths SSSI.
- 4.6 Members noted that car parking was high at the Lookout because of the number of activities participated in from that location. Usage had remained consistent, despite a parking levy being introduced in 2012.
- 4.7 Footprint Ecology had made recommendations, as part of their 2016 report, on possible changes to the temporal spread and number of transects across the year, to improve the data and analysis thereof, as well as recommending that car park changes should also be recorded and reflected in the transect data. These would be incorporated into the next survey.

**Agreed, that the report be noted.**

## **5. Financial Report**

- 5.1 Jenny Wadham, Principal Accountant from Hampshire County Council, presented an update on the financial position of the Thames Basin Heaths SAMM and seeking Board guidance on whether independent advisors should be appointed to invest some or all of the funds held within the Endowment account.
- 5.2 As at 31 March 2017, there was £4.387 million in the Endowment Fund, with £797,868 in the Maintenance Fund. It was projected that a further £1.133 million would be added to the Endowment Fund in 2017/18 and that the fund could rise to £7.673 million by 31 March 2020.
- 5.3 Jenny Wadham noted that, should the board be minded to invest monies generated in the 2017/18 financial year, a total of £5.520 million could be available.
- 5.4 Members noted that consideration of investments would be the subject of the subsequent report and agreed to focus on the financial statements only at this stage.
- 5.5 It was reported that the majority of the expenditure incurred to date (£1.188 million) was to cover project costs, with £10,160 allocated to Natural England for administrative support and £20,000 to Hampshire County Council for financial administration.
- 5.6 Total expenditure in 1016/17 had been £450,918, which was £21,214 less than forecast due to staffing vacancies and delays to planned works.
- 5.7 The SAMM business planned had envisaged an approximate requirement of £1.6 million annually to meet ongoing costs. The projected tariff incomes for the next 3 financial years would be £1.619m, £1.674m and £1.403m respectively. In the business plan, expenditure per annum, on an ongoing basis, would be £500,000. Actual expenditure would be in the region of £447,000 per annum.
- 5.8 Members noted that, despite earlier concerns over projected income and costs, these had been proved correct over time. The SANGS payments resulting from conversion of offices to residential accommodation was welcomed, but viewed as a windfall rather than an ongoing income stream.

### **Resolved, that**

- (i) The current financial position and projected financial position for the 3 years to 31 March 2020 be noted; and**
- (ii) The provision to transfer any unused Maintenance Fund balances to the Endowment Fund be noted, but the balance be**

**retained within the Maintenance Fund in the short term to meet staffing commitments.**

## **6. Future Investment of Endowment Fund Balances**

- 6.1 The Board were reminded that, at the previous meeting, it had agreed to establish a small steering group, including Councillors Moira Gibson, Mike Goodman and David Hilton, be tasked with considering investment options in relation to the Endowment Fund balance.
- 6.2 It was recognised that Hampshire County Council (HCC), as the Board's Administrative Body, would be able to invest on the Board's behalf and instruction, but would not be able to advise the Board or take on any risk on its behalf.
- 6.3 It had been proposed that financial advice be sought from CCL, which also provided financial advice to HCC. However, CCL would not engage independently with individual members of the JSPB, without HCC involvement.
- 6.4 The Board agreed to seek advice from CCL as a matter of urgency. Councillor Mike Goodman agreed to arrange possible dates for the Steering Group, supported by Jenny Wadham, to meet with CCL, to consider how to invest, how much, how to monitor/manage investments and due diligence requirements.
- 6.5 Following consideration of investment options and implications, it was agreed that the Steering Group recommendations should be circulated electronically to Board Members for an urgent decision, to avoid any further delay and maximise income.

### **Resolved, that**

- (i) The Board notes that the Administrative Body cannot provide financial advice on the investments of the Partnership;**
- (ii) The Board agrees to take independent financial advice before making any investment decisions, in accordance with the Partnership Agreement;**
- (iii) The Board agrees to provide clear written instructions to the Administrative Body in relation to any investments to be made, that are in accordance with the independent financial advice obtained;**
- (iv) The Board notes that the Administrative Body will ensure that the investment instructions have been fully taken account of, and are in accordance with, the independent financial advice provided to the Board, before making the investment;**

- (v) **The Board acknowledges that the investment risk rests with the JSPB, and not with the Administrative Body;**
- (vi) **A Steering Group, consisting of Councillors Moira Gibson, Mike Goodman and David Hilton, supported by Jenny Wadham, be tasked with meeting CCL Financial Advisers, as a matter of urgency, to consider how to invest, how much, how to monitor/manage investments and due diligence requirements; and**
- (vii) **The Steering Groups findings and proposals be circulated electronically to Board Members, with an electronic response sought, to allow actions to be progressed urgently.**

**7. SAMM Payments received by Authorities outside of the 11Thames Basin Heaths Authorities**

- 7.1 Marc Turner reported that, when the JSPB was established, a number of rural authorities fell into the SPA area but, at that point, it would not have been anticipated that there was any likelihood of their having and significant housing developments. However, at least 3 Authorities (Mole Valley, West Berkshire and Basingstoke and Dean) were potentially looking at housing within the SPA.
- 7.2 Any housing development in the SPA should generate SAMM contributions. However, any Authority contributing to the process would almost certainly look to have a presence on the JSPB. However, questions existed about a mechanism for those Authorities to make SAMM contributions, could the current agreement have an addendum to incorporate new arrangements or would a completely new agreement be needed and would the new participants have access to all existing funds?
- 7.3 It was noted that HCC could only spend funds because participating authorities had signed written agreements authorising that expenditure. Any arrangements with new authorities would require a similar sign-up.
- 7.4 Marc Turner clarified the Natural England position, which would involve JSPB support and instruction before projects could move forward or be rolled out to other Authorities. The tipping point for the JSPB would be an allocation in an Authority's Local Plan. He agreed to write to the Authorities concerned suggesting incorporation in Local Plans.

**Resolved, that**

- (i) **Options be explored around further authorities within the SPA collecting SAMM contributions; and**
- (ii) **Consideration be given to the inclusion of new authorities in the JSPB and the form of written agreement which would be necessary for the inclusion of new authorities on the JSPB.**



## **8. Wealdon Heath Judgement on Cumulative Impact of Development**

- 8.1 Marc Turner provided an update on a recent judgement which could impact on SPAs.
- 8.2 Wealdon District Council had challenged the Lewes Joint Core Strategy in the High Court, on the basis of the cumulative air quality impact on Ashdown Forest, within the South Downs National Park.
- 8.3 The judge quashed part of the Lewes Joint Core Strategy, the effect of which was the deletion of 1,177 allocated homes within the relevant boundaries of the South Downs National Park, on the basis that Lewes had failed to consider the cumulative ecological impact on Ashdown forest.
- 8.4 As well as eroding the Lewes 5 year housing Land Supply in the short and medium term, the judgement appeared to indicate that any future planning application in the area, including sites geographically remote from Ashdown Forest, would require a consideration of the potentially cumulative ecological impacts of development on this protected forest.
- 8.5 Although the judgement was considered to be somewhat vague in terms of useful practical detail, it was thought that the potential implications could include:
- (i) The need to contribute to or provide a Suitable Alternative Natural Greenspace (SANG) or Strategic Access Management and Monitoring (SAMM) as part of your application; and/or
  - (ii) To wait indefinitely for submission or a decision, as complicated regional habitat assessments are carried out or compensation/ mitigation measures are put in place.
- 8.6 Marc Turner confirmed that Natural England and the Air Quality Technical Action Group were reviewing this and other related judgements and a more definitive response would be released in due course.
- 8.7 Given the levels of new housing in Surrey each year for the foreseeable future, Air quality management was an issue for all Authorities in the SPA and any Local Plans or plans for major developments would clearly need an air pollution section. However, the impact on Thames Basin Heaths was not so clear.
- 8.8 Members also highlighted the ongoing impact of the motorway/highways networks and the M25, M3 and A3 in particular, as well as increased aircraft numbers, on air quality and the limited influence Councils had on these.
- 8.9 Councillor Moira Gibson noted that both Guildford and Surrey Heath Borough Councils had been identified by the Government as needing to achieve air

quality improvements, but the main issue, the M3, was outwith their control.

- 8.10 Councillor Brian Adams reported that the Inspector considering the Waverley Local Plan recently, had indicated a strong priority on housing over traffic infrastructure and delayed journeys.
- 8.11 It was reported that Rushmoor Borough Council, in its Local Plan, had taken a precautionary approach by considering any development generating 100 car movements a day rather than the more generally used level of 1,000.
- 8.12 Councillor Chris Turrell reported improved air quality in Crowthorne when traffic calming measures had been removed. Otherwise, air quality management in Bracknell Forest had been consistent.
- 8.13 It was agreed that, whilst each Authority would have to address the issue separately in their Local Plans, there was a need for a concerted approach by the 11 Authorities on how the cumulative impact of air quality would be assessed and a consistent approach on Habitat Regulations Assessment.

**The JSPB requested a report to the next meeting on**

- (i) The implications of the Wealdon Heath Judgement; and in the light of that and other related judgements**
- (ii) Recommendations for the JSPB on cumulative air quality impact assessment for Local Plans, including incorporation of any legal advice from Natural England.**

**9. Any Other Business**

- (i) Nightjars – It had been suggested at the previous meeting that a comparator data/trends in Dorset be considered. On further investigation, it was established that the Dorset nightjar numbers were very low. There was no apparent decline but data gathering there had been much less comprehensive than in this area.
- (ii) JSPB – By the next meeting, the JSPB and its forerunner will have operated for 10 years. It was agreed that consideration should be given to a press release/publicity and a Board photograph at the next meeting.
- (iii) Habitat Management Payments – A decision had been taken, some years previously on legal advice, that habitat development should be excluded from attracting developer contributions. At the previous meeting, it had been considered that this position should be reviewed and that more up to date legal advice should be sought.

Whilst noting that habitat management should have been a comment rather than an action and recognising that land owners could only

receive one payment for work on their land, it was agreed that this could be an area to be re-visited in the future.

- (iv) Natural England – Brexit Readiness Team - Noting that Natural England had established a Brexit Readiness Team, Members agreed to seek a presentation from that Team to a future meeting.

**10. Date of Next Meeting**

- 10.1 It was agreed that proposals on a date/time for the next meeting be circulated by e-mail.

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THAMES BASIN HEATHS  
JOINT STRATEGIC PARTNERSHIP BOARD

Date: 17<sup>th</sup> November 2017

Subject: SAMM Project update

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

Recommendations:

- To NOTE the contents of the report on SAMM project activity
- To APPROVE the recruitment of an education officer in July 2018
- To APPROVE the SANGs data collection exercise as appended

Purpose of the Report:

To provide the JSPB with an update on SAMM project activity since the last meeting in July 2017.

## Summary

This paper sets out for Members the SAMM project's activities and achievements since the last meeting in July 2017.

### 1. SAMM project staffing and recruitment

#### Seasonal wardens

- 1.1 One of the summer wardens reduced her hours during July and left the project early, at the end of July to take up a new part time and then full time role with Butterfly Conservation. The remaining 6 wardens (5 full time and one 0.6FTE) completed the season to the end.

#### Year round wardens

- 1.2 Two of the year round wardens were successful in gaining new roles within Natural England Thames Team and they left the SAMM team at the end of August. To backfill these posts, two of the Short Term Appointment (STA) seasonal contracts were extended to Dec 2017 and an external recruitment exercise was undertaken with interviews held on 14<sup>th</sup> November. As a result of this recruitment, a new warden is being appointed, who will start in early 2018. One vacancy was not filled. To backfill this post, one of the wardens on a STA has had their contract extended for the remainder of the winter season. A new Fixed Term Appointment (year round) recruitment will be run concurrently with the STA seasonal warden recruitment early in 2018.

1.3 In July 2018 the SAMM project would like to appoint a full time education officer to support the existing education and communication coordinator to deliver more school visits. The project would like to extend the provision of educational sessions to school children to teach about the species that live on heathland, the important features of the habitat, and threats to the Annex 1 bird species from Man. This fits in well with the Year 6 science and geography curriculum including food chains, habitats and animal adaptation. It would extend the pilot project that we took over from BBOWT which was very well received by participating schools. Children are our future and messages around behavior change are well received if children are engaged in the first instance and the messages are then readily accepted by older family members. The associated costs of a recruitment are set out below and have been submitted to HCC. The appointment of an education officer will also allow the project to maximize the opportunity of the space available at Heather Farm to provide education to non-school groups. Approval is sought from the JSPB board for a recruitment in July next year.

## 2. Wardening and Delivery

2.1 The project currently provides a warden service on the SPA seven days a week from 07.30 to 19:00 (daylight hours permitting).

### SPA Wardening

2.2 The updated warden output for the project for 2017 is set out below. The following tables set out the number of hours of warden activity delivered on the SPA during the period July-October 2017.

July	Total hours wardened	728.2
	Number of interactions	1508
	Number already spoken to	725
	Leaflets handed out	1026
	Number of dogs	1622
	Number of dog walkers (5+)	42
	Average already spoken to	48.08%

August	Total hours wardened	583.4
	Number of interactions	1538
	Number already spoken to	608
	Leaflets handed out	1302
	Number of dogs	1371
	Number of dog walkers (5+)	52
	Average already spoken to	39.53%

September	Total hours wardened	322.95
	Number of interactions	842
	Number already spoken to	300
	Leaflets handed out	818
	Number of dogs	746
	Number of dog walkers (5+)	44
	Average already spoken to	35.63%

October	Total hours wardened	312.75
	Number of interactions	473
	Number already spoken to	181
	Leaflets handed out	436
	Number of dogs	480
	Number of dog walkers (5+)	21
	Average already spoken to	38.27%

- 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 remained high over the sensitive summer period, with number of hours dropping off when the seasonal wardens left at the end of August.
- 2.5 The level of interactions is expected to be lower during the autumn/winter than in the spring and summer due to the sites being quieter, and there being fewer sensitivities on the SPA during this period. The number of leaflets handed out is also lower than in the spring and summer, as the majority of our literature relates to the ground nesting bird sensitivities on the SPA, which is less relevant outside the bird breeding season.
- 2.6 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, which are considered to be a growing problem on the Special Protection Area (SPA).
- 2.7 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. This year to date (Jan-Oct) the average percentage of people on the SPA who have been previously made aware of the project, and its key messages, is 37.2%, with this figure rising to an average of 40.3% of people during the sensitive period.
- 2.8 The tables also show the number of dogs walked by the people spoken to by wardens: This was on average over 1 dog per interaction (although an interaction may be a group rather than an individual). The number of dog walkers with five or more dogs provides a suggested level of commercial dog walkers interacted with, although some will be individuals who just own a large number of dogs. The highest number in any single month was August when 52 dog walkers with 5 or more dogs were spoken to.
- 2.9 To summarise, during 2017 (1<sup>st</sup> Jan until the end of October) the project has delivered 5406 hours of wardening on the SPA; handed out 7775 pieces of literature, and spoken to 10,578 people or groups, who had 10,783 dogs.

### **SANGs Visitor Surveys**

- 2.10 The project has now received the analysis of the SANGs visitor surveys undertaken during the autumn and winter of 2016/17. A summary of the report is appended to this paper and will be presented separately.
- 2.11 A new methodology was recommended by Footprint Ecology to undertake the 2017 winter SANG surveys using an app called SNAP, hosted on iPads. The recommendation was that this would facilitate easier and more accurate data collection, be user friendly and remove

the need for data to be transferred from paper to digital form once the surveys had been completed, hence being more efficient and removing error due to multiple data handling. This recommendation has been taken forward and 6 i-Pad devices have been purchased in order to conduct the 2017 surveys. Footprint ecology are advising on and supporting the setup of the survey, which is currently being finalised in preparation for doing 12 more SANG surveys this autumn/winter.

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

- 3.1 The project has recently been extending the dates for some current access agreements to align them to the end of the NE hosting period. Extended agreements have been signed with Surrey Heath BC, Surrey Wildlife Trust and Horsell Common Preservation Society. Most other agreements were already aligned.
- 3.2 A new access agreement has also been signed with Woking Borough Council to warden at Brookwood Heath and Sheets Heath near Brookwood. An orientation event is being arranged with the land manager for the wardening team in early December.
- 3.3 Negotiations with the MoD have progressed very well, with a final draft of the access agreement having been agreed following a meeting with James Nevitt, Senior Access & Recreation Advisor with the Defence Infrastructure Organisation (DIO) and Lieutenant Colonel Mark Ludlow – Training Safety Officer (Security and Access) South East (TSO(S&A)SE). The agreement is now with Vanessa Cole – Government Legal Service to ensure that the final draft is aligned with national objectives and agreements. Lieutenant Colonel Dickie Bishop – Commander Service Delivery Training South East. (Comd SD Trg SE) and Natural England Area Manager Andy Smith are expected to sign the agreement by the end of the calendar year.
- 3.4 The SAMM project designed and produced a new, robust ground nesting bird sign and put these up, by agreement with the Access Management and Monitoring Partnership group across a large proportion of sites on the SPA, including MoD sites. This was a big step towards having consistent signage with consistent dates, with an access management period from 1<sup>st</sup> March to the 15<sup>th</sup> September, following evidence that the birds are breeding and fledging their young and so are still susceptible to disturbance in some years until well into September.

### **4 Communications, Promotion and Events**

- 4.1 The Thames Basin Heaths Partnership website can be accessed at [www.tbhpartnership.org.uk](http://www.tbhpartnership.org.uk) and continues to receive positive feedback. We are currently reviewing the website and plan to make additions to content in early 2018, to include a calendar of events, downloadable resources and a “how you can help” page, linking to the volunteering pages of partner websites as well as a dedicated page for our Heathland Hounds initiative.
- 4.2 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 booklet is also now available from most local authority offices/visitor centres and from the Ministry of Defence Range



Marshalls. The booklets still prove very popular and a new print run of 2000 leaflets has just been delivered. We are currently updating content and liaising with Local Authorities to update information for new and existing SANGs so that we can keep web and printed material current.

- 4.3 Our 'Heathland Hounds' project, a dog owner focused initiative promoting positive behavior (specifically on the SPA but also more generally) has made good progress since its launch in March. This initiative is being promoted through pitstops and active engagement with dog walkers both on-site and through social media. Heathland Hounds has a social media presence through Facebook, with people invited to join the Heathland Hounds group via promotion by the Wardens and through temporary signs placed on SPA site notice boards. The group is beginning to build steadily and we are seeing an increase in engagement with the FB site and on regular organized dog walks on SANGs, which is developing successful new interactions with dog walkers specifically. Heathland Hounds has recently had organized walks at Crookham Park, Heather Farm, Shepherd Meadows, Riverside Nature Reserve and Chobham Water Meadows.  
<https://www.facebook.com/groups/HeathlandHounds/748305735317721/>
- 4.4 During the 2017 bird breeding season the project has built on the experience gained in 2016 when we trialled a small number of guided walks on SANGs. This year we undertook walks on Riverside Nature Reserve, Lark's Hill and The Cut Cluster, Chantry Wood, Buckhurst Meadows, Wellesley Woodland, Brookwood Country Park and engaged a younger audience with a Pokémon Go walk at Lily Hill Park.
- 4.5 The project used 'Love Parks Week', organised by Keep Britain Tidy (14<sup>th</sup> – 23<sup>rd</sup> July), to promote SANGs by taking photographs of the sites and promoting them through our social media with the #LoveParks, promoting Chobham Place Wood, Bassets Mead, Ambarrow Woods, Shepherd Meadows and Peacock Meadows. <https://t.co/NsNRrSkHyR>
- 4.6 In addition to the activities and initiatives listed above the project has also been holding a greater number of pitstops on the SPA sites, including at new venues such as the Red Cross Centre at Yateley, Ash Vale car park, and Caesars Camp and Aldershot Road where we have been engaging new contacts during the nesting season to spread our message to the public.
- 4.7 On 26<sup>th</sup> of September several members of the SAMM team travelled to Exeter to meet with a group of colleagues who deliver other mitigation projects in the South of England. We met with individuals from projects such as the Urban Heaths Partnership, a project mitigating against development around Poole in Dorset; Devon Loves Dogs, an initiative to promote responsible dog ownership in Devon, and Bird Aware, based in the Solent, which is concerned with bird disturbance to overwintering waders and wildfowl on the coast. The project has since been developing links with these projects and also the South Downs National Park initiative, "Take the Lead Campaign", to share ideas, tools and best practice to maximize public engagement opportunities. This will result in direct cost savings and maximize the effectiveness of the SAMM project.
- 4.8 Our team also organized a wildfire awareness training event in July, which was well attended by partner organizations on the AMMP group and run by Rob Gazzard, an experienced forester and wildfire behavior expert. This raised awareness of the importance of good habitat management for wildfire prevention, and gave our wardens and site managers the skills they need to be more confident in dealing early and decisively with

wildfire incidents, should they arise, reduce the impact of events on Annex 1 birds and other heathland species and improve the safety of site users.

## **5 School Based Education**

- 5.1 The Communication and Education Officer, with support from one of the wardens, led three schools visits for primary schools in the Crowthorne area, to the SPA heathland at Wildmoor Heath in October. Groups of 1 Year 6 class from Pine Ridge and 2 Year 6 classes Birch Hill Primary School were treated to an interactive classroom session and then later taken out to the heathland on a field trip to learn about the rare and sensitive habitats and the species they support. These visits were very well received by the schools involved, and were publicized on their twitter feed e.g. see- <https://t.co/db8hNjoda0>

## **6. SPA and SANGs Monitoring**

### **Automatic people counter installation**

- 6.1 The report summarizing the results of the Automated People Counter Data is appended to this paper and will be presented separately. Some unreliable people counters are due to be replaced in 2018 by the much more reliable Chambers Radiobeam counters, so that the data set going forward is robust and reliable.

### **Car Park Counts**

- 6.2 The project continues to undertake monthly car park transects across the SPA area, and is now in the second year of undertaking this work.
- 6.3 The second 12 months of car park transect data collection will be completed in December 2017, and Footprint Ecology will subsequently be commissioned to undertake an analysis of this data in early 2018.

### **SANGs monitoring information**

- 6.4 In order to produce an annual report, and to inform SANGs promotion and monitoring, the SAMM project would like Local Authorities re-introduce the practice of recording SANGs data for their own borough, as detailed in the appended spreadsheet, so that the SAMM project manager can collate SAMM, SANG information and bird data to produce an annual report on the strategy. The SAMM project will be asking Local Authorities for this data at the JSPB Officers meeting in early January 2018 and the data collected by the end of January 2018. This data will inform the SAMM project of any summer SANG surveys that need to be undertaken, any new SANGs adding to the database and allow for more accurate budgeting. Approval for the data collection as per the attached spreadsheet is sought at this meeting.

## **7. Looking forward to 2018**

- 7.1 In January 2018, the Project will take delivery of 3 new branded lease vans, which will provide us with a great opportunity not only to maximize our visibility on the SPA, increasing awareness of the project, but also allow us to take full use of the project gazebos with less logistical juggling. This will also help us to develop our pitstops to be even more engaging to the public, by allowing us to develop our resources so that we can offer new information and engagement opportunities with repeat customers.
  
- 7.2 The project manager has been working hard to progress the lease agreement with Horsell Common Preservation Society for a new office base at Heather Farm, which offers numerous benefits to the project over the current office base at Alice Holt. This has been slow to progress since the JSPB approval of the move last year. However, negotiations are now progressing well and we expect to move in January 2018. Negotiations with the Forestry Commission have also resulted in a reduced required notice at Alice Holt, meaning there will be minimal overlap in rental payments.

Appendix 1- Costings for project as agreed and projected costs with addition of full time Educational Officer

Scenario	Original 2017/18 figure from Jan 2017	2017/18	2018/19	2019/20
Basic SAMM programme (as currently operated)	£427,000	£431,331.00	£453,087.00	£442,367.00
Salary	£298,878.00	£309,113.18	£309,113.18	£309,113.18
T&S	£41,093.00	£42,100.00	£42,100.00	£42,100.00
NPRC	£10,098.00	£19,069.00	£22,720.00	£19,000.00
Programme	£65,350.00	£49,467.82	£67,572.82	£60,572.82
Hosting and assoc.	£11,581.00	£11,581.00	£11,581.00	£11,581.00

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Enhanced programme with dedicated Education officer, recruited July 2018	Salary	£309,113.18	£328,013.18	£338,013.18
	T&S	£42,100.00	£44,100.00	£44,100.00
	NPRC	£19,069.00	£24,720.00	£22,000.00
	Programme	£49,467.82	£62,188.02	£48,188.02
	Hosting and assoc.	£11,581.00	£11,581.00	£11,581.00
		£431,331.00	£470,602.20	£463,882

## Analysis of Thames Basin Heaths 2016 People Counter Data

### Summary of unpublished report by Footprint Ecology for Natural England

Visitor access data is collected using automated counters placed at access points. These counters can be used to examine daily, weekly and monthly patterns at specific locations, and to study trends across several years. This report examines the data collected during 2016 for 21 counters.

During 2017 another 13 counters were added to the network and 5 unreliable or missing counters were replaced.

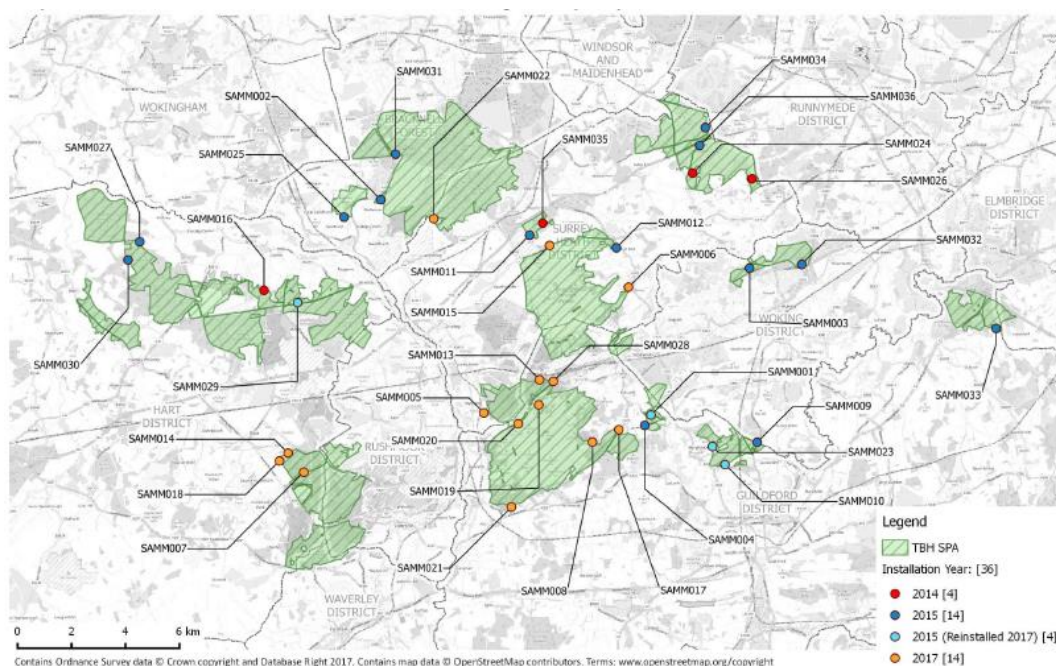


Figure 1 - Distribution of counters across the Thames Basin Heaths

SSSI name	Approx. area (ha)	Number of counters
Ash to Brookwood Heaths	1570	10
Bourley & Long Valley	820	3
Bramshill	670	2
Broadmoor to Bagshot Woods & Heaths	1690	3
Castle Bottom to Yateley and Hawley Commons	920	2
Chobham Common	650	4
Colony Bog & Bagshot Heath	1130	5
Eelmoor Marsh	70	0
Hazeley Heath	180	0
Horsell Common	180	2
Ockham & Wisley Commons	220	1
Sandhurst to Owlsmoor Bogs & Heaths	90	1
Whitmoor Common	170	3
<b>Total</b>		<b>36</b>

Figure 2 - Distribution of counters across SSSIs

In the full report, Footprint Ecology describe issues relating to the data collected, including early setup issues, equipment damaged by water, unreliable data caused by insects in the Schmidt Passive Infrared counters and vandalism. Vandalism was the main issue.

Four counter types have been used, from three different companies. The full report lists the pros and cons of the different equipment.

Sensor type	Number of sensors (all years)	% of sensors vandalised (all years)	% of sensors with data issues (all years)	Number of sensors (only sensors recording data in 2016)	Average of % of errors in each unit for 2016 data
PIR	11	50.4	54.5	11	21.3
Pressure pad	5	20	80	5	7.6
RadioBeam	20	10	5	6	5.8
<b>Total</b>	<b>36</b>	<b>25</b>	<b>30.5</b>	<b>22</b>	<b>13.6</b>

Figure 3 - Summary of the quality of data and vandalism recorded from the different types of counter

After data cleaning, the 2016 dataset consisted of 20 counters which collected 14,456 data rows, i.e. hours of data. For a single counter, SAMM001 which had only recorded data for January, all data was discarded. The number of data rows for individual counters in this cleaned data set ranged from 2,640 (SAMM027, equivalent to c. 110 days) to 8,640 (SAMM036, equivalent to c. 360 days), although most counters collected a reasonable amount of data, with a mean value of 7,179 hours per counter (equivalent to c. 299 days).

## 1. Variation across months of the year

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Annual Mean	Ratio of Min/Max	SD
SAMM002	-	1.8	1.8	1.9	2	2.1	2.1	2.2	1.7	1.8	1.7	1.9	1.9	0.77	0.2
SAMM003	1.1	1.5	1.4	1.3	-	-	1.7	1.7	1.5	1.4	1	1.2	1.4	0.59	0.2
SAMM004	0.3	0.4	0.3	0.4	0.5	0.4	0.2	0.2	0.4	0.5	0.9	0.8	0.4	0.22	0.2
SAMM009	-	0.2	0.2	0.2	0.3	0.4	0.4	0.4	0.2	0.8	0.5	0.3	0.4	0.25	0.2
SAMM010	-	0.1	0.1	0.4	0.9	1.2	1.5	1.8	1.5	0.5	0.2	0.8	0.8	0.06	0.6
SAMM011	-	5.9	5.6	5.8	8.4	-	5.7	5.4	5.3	5.4	4.1	5.1	5.5	0.49	1.1
SAMM012	0.1	0.2	0	0	0.2	0.1	0.6	1.5	1.5	1.5	1.2	1.7	0.7	0.00	0.7
SAMM016	6.5	1.5	1.6	5.5	2.6	7.4	23.2	9.3	2.8	2.8	6.2	8	5.5	0.06	5.9
SAMM023	1.2	1	1.2	1.1	3	4.5	2.3	2.3	1.9	1.4	0	1.4	1.8	0.00	1.2
SAMM024	-	0.1	0.1	0.2	0.3	0.3	0.3	0.2	0.2	0.2	0.1	0.1	0.2	0.33	0.1
SAMM025	-	0	0	0.1	0.3	0.4	0.6	0.9	0.7	0.2	0	0	0.3	0.00	0.3
SAMM026	0.2	0.3	0.4	0.6	0.6	0.6	0.6	0.5	0.4	-	-	0.3	0.5	0.33	0.2
SAMM027	0.9	0.3	0.3	0.3	0.1	-	-	-	-	-	-	-	0.3	0.20	0.1
SAMM030	1.7	2.4	1.9	1.7	2.6	2	2.1	2.1	2.3	2	1.6	1.9	2	0.62	0.3
SAMM031	1.3	1.6	1.1	1.3	1.3	1.3	1.3	1.5	1.1	1.2	1	1.1	1.3	0.63	0.2
SAMM032	13.7	-	-	21.6	18.3	15.8	16	20.3	19.8	17.4	14.5	18.5	17.2	0.63	2.6
SAMM033	-	-	-	-	-	0.1	1.1	0.5	0.1	-	0.3	0.2	0.5	0.09	0.4
SAMM034	0.3	-	-	1.3	0.8	1.7	1	0.9	0.9	1	0.7	0.7	0.9	0.18	0.4
SAMM035	8.9	8.4	5.3	5.2	4.8	4.2	4.7	4.8	4.6	5	5.4	5.5	5.6	0.47	1.5
SAMM036	1.3	1.1	1.9	1.8	2	1.1	1.4	1.7	1.6	1.8	1.4	2.2	1.6	0.50	0.4
<b>Total</b>	<b>2.7</b>	<b>1.5</b>	<b>1.4</b>	<b>1.7</b>	<b>2.6</b>	<b>2.6</b>	<b>2.7</b>	<b>3.1</b>	<b>2.6</b>	<b>2.6</b>	<b>2.4</b>	<b>2.7</b>			
<b>Mean</b>	<b>2.8</b>	<b>1.6</b>	<b>1.4</b>	<b>2.7</b>	<b>2.7</b>	<b>2.6</b>	<b>3.5</b>	<b>3.1</b>	<b>2.6</b>	<b>2.6</b>	<b>2.3</b>	<b>2.7</b>			

Figure 4 - Average number of passes per hour in each month for the individual counters, with cells coloured red to green for low to high values

## 2. Variation across hours of the day

	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
SAMM002	3	6	7	7	7	10	8	7	9	8	9	7	4	4	2
SAMM003	0	1	2	5	13	16	12	10	8	8	8	6	5	4	2
SAMM004	1	3	6	7	8	8	9	15	12	7	6	7	5	2	0
SAMM009	1	2	3	7	8	10	8	11	17	11	10	6	4	2	1
SAMM010	3	3	8	7	6	6	6	6	7	8	9	9	9	8	4
SAMM011	1	4	8	10	11	10	8	8	9	10	8	6	4	2	1
SAMM012	0	1	3	8	9	9	9	7	8	8	10	9	8	7	2
SAMM016	1	2	3	4	5	9	15	10	8	7	6	5	4	2	2
SAMM023	1	2	5	7	10	10	10	7	7	9	11	5	4	4	9
SAMM024	0	3	4	8	11	13	9	7	7	9	7	7	5	3	3
SAMM025	2	4	5	8	8	6	6	4	5	6	9	9	12	10	4
SAMM026	0	1	2	4	9	9	8	10	9	11	13	10	6	5	2
SAMM027	1	3	6	7	10	8	9	9	10	10	8	6	3	2	1
SAMM027	1	3	6	7	10	8	9	9	10	10	8	6	3	2	1
SAMM030	0	1	3	7	10	14	15	13	7	7	7	6	4	2	2
SAMM031	1	2	3	6	9	12	13	9	7	6	8	6	7	5	4
SAMM032	0	1	3	6	9	10	10	9	9	10	10	8	5	4	3
SAMM033	0	0	1	1	2	4	9	11	15	21	3	0	5	7	0
SAMM034	0	1	2	3	6	6	8	11	23	12	6	5	4	4	3
SAMM035	0	1	4	9	10	12	10	10	8	8	9	7	5	3	2
SAMM036	0	0	1	2	6	10	13	12	13	13	11	8	4	2	2

Figure 5 - Hourly percentage of passes recorded for the different counters, with cells coloured red to green for low to high values. Percentage based on all recorded passes during the 24 hrs, but only values between 07:00 & 21:00 shown

### 3. Variation across days of the week

	Mon	Tues	Weds	Thurs	Fri	Sat	Sun	% of passes on weekends	% passes on Sundays
SAMM002	180.0	185.7	174.2	176.6	176	191.8	226.1	32	17
SAMM003	117.8	92.9	105.9	107.2	109.2	181.0	228.8	43	24
SAMM004	36.0	34.9	66.6	39.0	37.0	40.1	36.9	27	13
SAMM009	30.2	25.3	46.1	25.4	32.5	39.4	46.1	35	19
SAMM010	72.6	74.0	69.1	70.2	74.9	87.9	112.0	36	20
SAMM011	473.6	426.3	439.4	432.5	441.8	651.6	850.0	40	23
SAMM012	61.8	64.9	64.2	71.1	65.7	71.4	94.1	34	19
SAMM016	399.4	710.3	500.3	553.0	661.4	531.5	435.5	26	11
SAMM023	161.9	279.0	136.6	151.0	135.6	155.9	220.8	30	18
SAMM024	14.0	11.8	16.5	14.1	16.1	24.5	27.0	42	22
SAMM025	27.5	35.1	29.5	25.2	26.2	30.1	42.0	33	19
SAMM026	43.1	42.7	38.7	36.6	33.0	54.5	69.6	39	22
SAMM027	32.8	31.5	31.5	37.8	26.7	45.6	66.7	41	24
SAMM030	177.0	137.8	146.4	156.0	175.2	248.7	354.3	43	25
SAMM031	73.4	69.2	115.8	93.2	84.1	175.2	250	49	29
SAMM032	1558.9	1428.3	1441.2	1656.7	1484.7	1957	2295.9	36	19
SAMM033	12.3	19.4	55.5	47.6	8.6	26.2	161.1	57	49
SAMM034	98.2	88.4	96.2	107.6	68.1	64.3	93.5	26	15
SAMM035	487.7	546.1	485.2	502.9	442.9	515.3	827.6	35	22
SAMM036	120.8	95.3	80.5	101.8	94.1	194.2	409.3	55	37

Figure 6 - The average number of passes for each day of the week. The percentage of all passes which occur of weekends and Sundays is also shown

### 4. Conclusions and discussion

The results provide a fascinating overview of the access at the counter locations, and over time it will be possible to look for changes across years. As such the counter network forms an important component in the long-term monitoring of access on the Thames Basin Heaths.

The counter data relate to very specific locations, i.e. single gateways or tracks. Looking across the locations, the counter with highest level of daily passes (by some margin) was one at Horsell Common, around 50m down the track from the main car-park. This is a popular car-park and a busy part of the SPA. Other busy locations, in terms of daily passes, included Lightwater Country Park.

Across all locations, results indicate the use is greatest around midday, but that certain locations exhibit twin peak patterns with greater use late morning and again in late afternoon.

Use was also typically greater at weekends, but this is location specific and a few counters recorded higher values on weekdays.

Variation across the year was interesting for its relevance to the sensitive period from 1<sup>st</sup> March to 15<sup>th</sup> September, during which the three SPA bird species are nesting. While it would be expected that use is



much greater in the sensitive period, there was often a lull in use in February-April. This factor, combined with reasonably high access in December-January (likely influenced by Christmas/ New Year's holidays), resulted in an overall similar level of access between the sensitive period and non-sensitive period.

It is important to highlight that results give values for the number of passes recorded and that can be approximation for, but is not directly equivalent to, numbers of people. Counters ideally require calibration, e.g. direct observation, to record how the passes recorded equate to the number of people and how different access is recorded.

The overall reliability of the data is believed to good, and while approximately 9% of data was discarded this was not considered unusual given the issues that can be encountered. The issues were often more apparent in winter, due to the general effects of winter weather. The winter values need to be considered in light of this effect.

Vandalism is an issue, and this may be hard to avoid, and can occur at any time and wipe out all data which has been collected since the previous data download. Measures to minimise impacts on the data, such as regular checks and rapid replacement are recommended.

Networks of counters can provide very useful and detailed data but require considerable input to maintain, check and ensure the information is reliable and useable. The usefulness of the data comes from a consistent, well-maintained network running for a number of years, providing a long-term perspective of change and fluctuations. The data summarised here are the initial results and more data are required to conclude monthly patterns and allow change over time to be picked up. The data collected to date provides a reasonable sample of data at a daily and weekly level, but comparing monthly totals becomes more challenging, and the number of counters where this is possible is limited. The counter network needs to be carefully maintained, regularly checked and allowed to run for longer in order to allow more accurate and detailed comparisons between locations and over time.

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## Analysis of Thames Basin Heaths SANG Visitor Survey Data

### Winter 2016/17

Summary of unpublished report by Footprint Ecology for Natural England

SANGs were surveyed during the winter of 2016/17 by the SAMM project team. Face-to-face interviews were conducted with site users at 17 SANGs. A single survey point was used to intercept visitors at key access points, mostly main car parks. Surveys were conducted for 6 hours on two week days and one weekend day (8:00-10:00, 11:00-13:00, 14:00-16:00), giving 18 hours of survey in total per SANG. 960 interviews were conducted.

SANG	Local Authority	Size of site (ha)
Allens Field	Windsor and Maidenhead	9.2
Brooklands Community Park	Elmbridge	25.6
Brookwood Country Park	Woking	19.8
Chantry Wood	Guildford	77.1
Chobham Place Woods	Surrey Heath	11.1
Crookham Park	Hart	72.8
Engelmer Pond	Bracknell Forest	27.5
Farnham Park	Waverley	85.8
Heather Farm	Woking / Surrey Heath	24.8
Homewood Park	Runnymede	23.3
Lily Hill (Long Hill Park Group)	Bracknell Forest	33.3
Riverside	Guildford	29.5
Rook's Nest Wood	Wokingham	18.6
Rowhill	Waverley / Rushmoor	24.2
Southwood Woodland	Rushmoor	32.4
St Ann's Hill	Runnymede	21.1
White Rose Lane	Woking	7.4



Figure 1 - Summary of the 17 sites surveyed



Figure 2 - Number of interviews conducted

## 1. Reason for visiting

Solely dog walking accounted for 72.4% of interviewees, increasing to 76.9% when including those combining dog walking and other activities (e.g. dog walking/running) (this includes commercial dog walking, as we did not distinguish between private and commercial dog walkers).

The average number of dogs per group was 1.1.

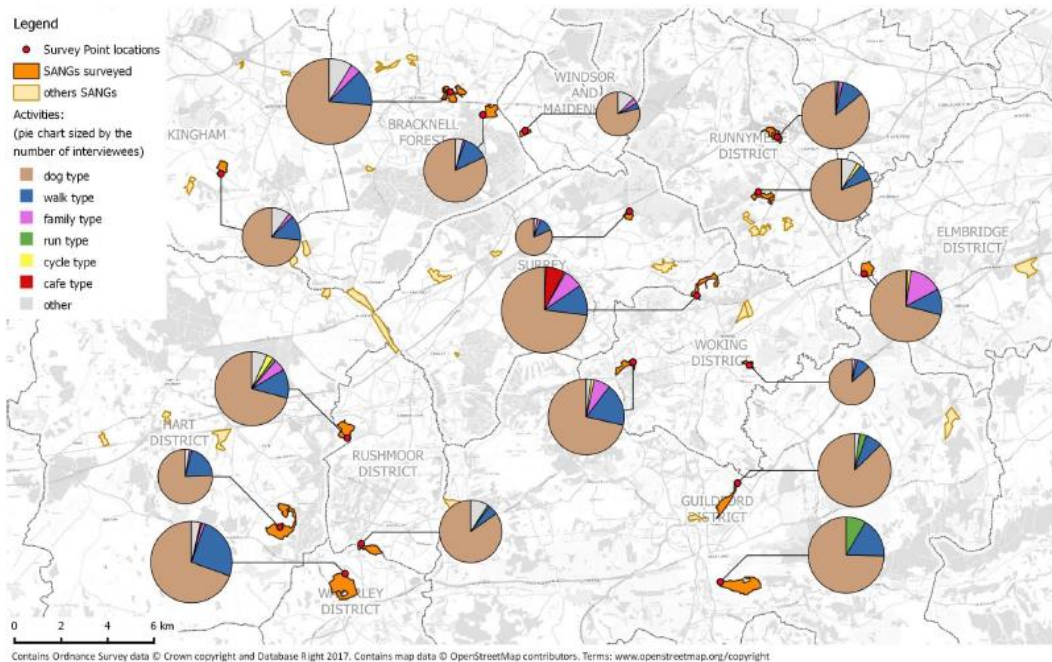


Figure 3 - Pie chart showing activity types



## 4. Features liked

Close proximity to home was the most common reason interviewees liked a site, with 21.9% mentioning this. This was followed by scenery or comments regarding views, picturesque nature etc. (19.9%), quality of paths/surfacing (16.8%), being peaceful/quiet (15.6%) and well maintained/tidy (15.5%).

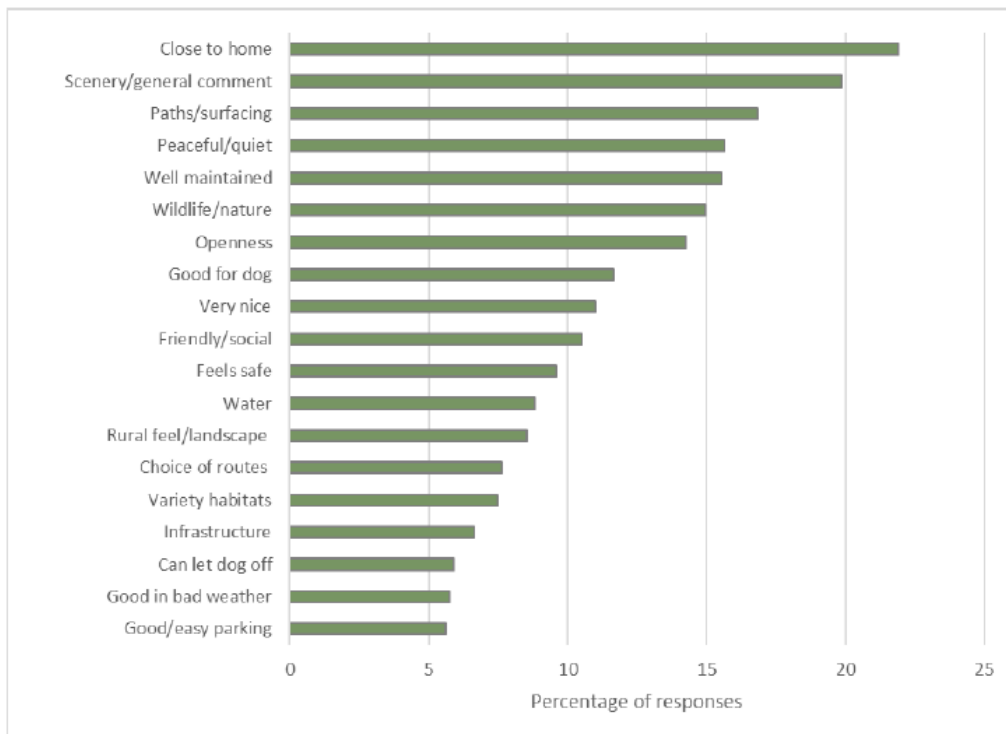


Figure 6 - Percentage of responses selecting features liked

## 5. Suggested improvements

The most common improvement asked for was for more bins or more regular emptying of bins. Approximately one fifth of all interviewees mentioned this in their suggested improvements. The second highest ranked suggestion was for better paths.

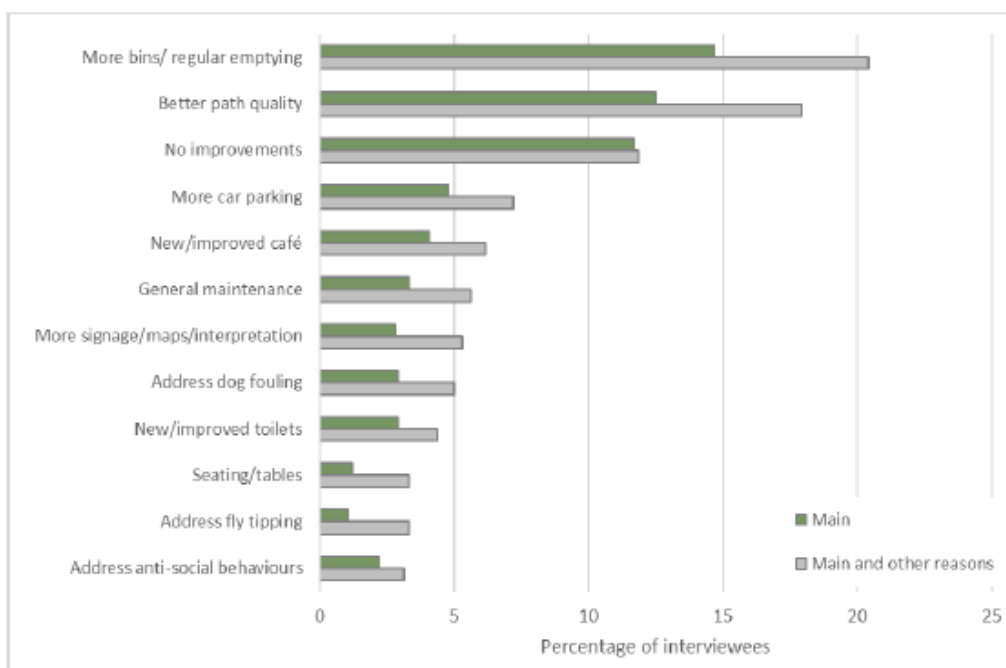


Figure 7 - Percentage of responses selecting features for improvement

## 6. Alternative sites

The use of the SPA and other SANG sites was also examined. While 50% of interviewees included an SPA site in their alternative named sites (e.g. at least one named in the list of sites given), it was good to see that just under a quarter of interviewees named SANG sites.

## 7. Postcodes

The typical radius for interviewees was quite small; on average 3.68 km (mean values). Half of all interviewees lived within 1.47 km of the survey point where they were interviewed (i.e. 1.47 was the median). However, this varied greatly between sites.

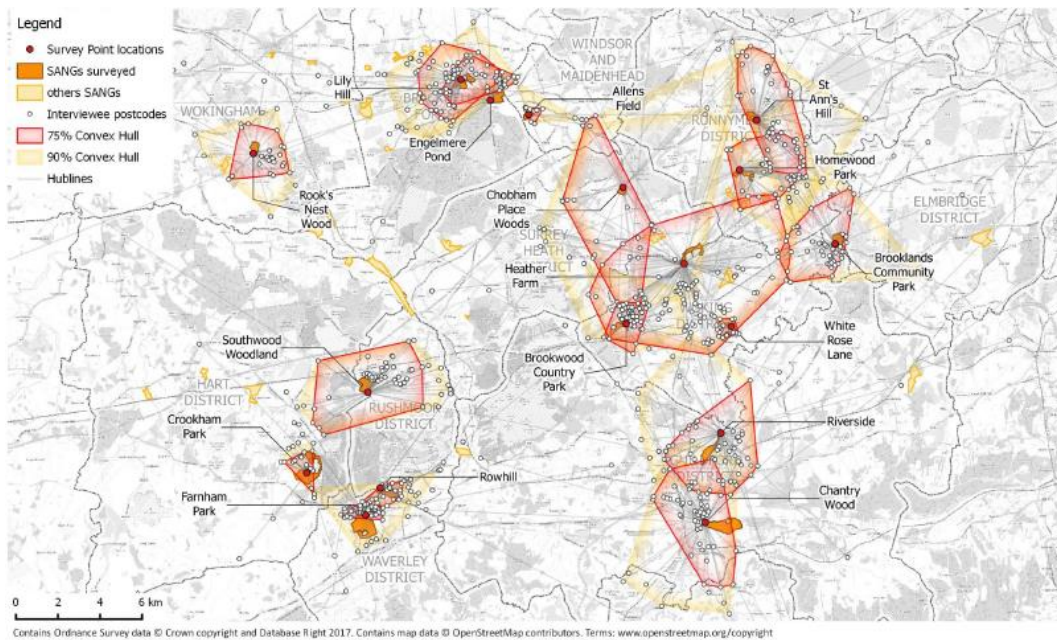


Figure 8 - Distribution of interviewee postcodes showing 75<sup>th</sup> and 90<sup>th</sup> percentile radius for each site

## 8. Knowledge of TBH partnership:

One of the final questions in the survey asked if the interviewee had heard of the Thames Basin Heaths Partnership. We asked this question if interviewees mentioned that they visited the SPA. Of those asked, 29% had heard of the TBHP.

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## Strategy

Authority name:	Adoption date of current strategy (if relevant)	Adopted tariff for SANG (£)*	Adopted tariff for Access Management /monitoring (£)*	Planned adoption date of any new strategy/strategy review	Any other comments
	As of 14 July 2012	£1279 per dwelling	1 bedroom = £399 2 bedroom = £526 3 bedroom = £711 4 bedroom = £807 5+ bedrooms = £1,052	None	
	As of 28 March 2012	1 bedroom = £1350 2 bedroom = £1770 3 bedroom = £2400 4 bedroom = £2730 5+ bedrooms = £3550	2 bedroom = £399 2 bedroom = £526 3 bedroom = £711 4 bedroom = £807 5+ bedrooms = £1,052	None	
<b>Elmbridge Borough Council</b>	SAMM collected through S106. per dwelling tariff adopted in April 2012 in Developer Contributions SPD. SANG now collected through Community Infrastructure Levy (Charging Schedule forms Addendum to SPD) adopted April 2013, with money being allocated from this on a per dwelling tariff basis.	Per dwelling tariff = £824 - £4,691 Community Infrastructure Levy Charge = £125 per sqm	£514 - £1,462	N/A	None
<b>Page 31</b>		1 bed - 3,432.18 2 bed - 3,983.84 3 bed - 4,535.51 4+ bed - 5,087.20	1 bed - 556.72 2 bed - 706.19 3 bed - 878.22 4+ bed - 1,033.08		The current strategy is dated 2009-2014. However, we are delaying the review in order to more closely align it with the Local Plan process. At the present time, we consider the strategy up to date as the situation has not changed.
<b>Guildford Borough Council.</b>	2009			Spring 2015	
<b>Monitoring figures up to end June 2015</b>					
<b>Hart</b>	Nov 10 (Annex on contributions amended Jan 2011)	Hitches Lane: £3,858 (1 bed), £7,183 (2-3 bed), £10,388 (4+ bed). Hawley Meadows: £3,380 (1 bed), £6,292 (2-3 bed), £9,100 (4+ bed).	£342 (1 bed), £636 (2-3 bed), £921 (4+ bed)	No review currently planned. Current strategy already includes SAMM	Already collecting
<b>Royal Borough of Windsor and Maidenhead</b>	Jan-13	1 bed / bedsit £7,061 2 bed £7,705 3 bed £8,572 4 bed £9,025 5+ bed £10,171	1 bed / bedsit £417 2 bed £551 3 bed £744 4 bed £846 5+ bed £1,102	Review scheduled each Oct	n/a
<b>Runnymede</b>	01/04/2007 (SANGS) and 1 May 2010 (SAMM)			Not known	These figures do not include DERA site which is expected to be about 2,000 dwellings
<b>Rushmoor Borough Council</b>	30/11/2010 and amended 21/2/2012	Based on £2,600 per person - £3640 to £9620 per property based	£399 to £1052 per property	n/a	None

Surrey Heath Borough Council	Original July 2008 amended January 2012	Chobham Place Woods £2,870 per dwelling (now closed) . Hawley Meadows 1 bedroom = £3640 2 bedroom = £4810 3 bedroom = £6,500 4 bedroom = £7410 5 bedroom = £9620. Swan Lakes 1 bedroom = £3640 2 bedroom = £4810 3 bedroom = £6,500 4 bedroom = £7410 5 bedroom = £9620	263 per person (1 bed: £368/ 2 bed: £487/3 bed: £658/4 bed:£750/5 bed:£973)	No review planned although CIL will be in place from 1st December 2014	None
Waverley Borough Council	15th Dec 2009	One bedroom = £1423 Two bedroom = £1911 Three bedroom = £2726 Four bedroom = £3106 Five+ bedroom = £4051	One bedroom = £345 Two bedroom = £463 Three bedroom = £660 Four bedroom = £752 Five+ bedroom = £981	n/a	
Woking BC	01/09/10	Studio £504 1 bed £548 2 bed £739 3 bed £974 4 bed and greater £1131	Studio £463 1 bed £463 2 bed £627 3 bed £825 4 bed and greater £958	Tbc	Tariff TBC (tariff is index linked)  CIL implemented 01/04/2015. SANG will be top sliced from CIL income
Wokingham BC	04-May-10	Within 5km SPA: 1 bed = £1,567.98, 2 bed = £2,049.59, 3 bed = £2,690.09, 4 bed = £3,546.86, 5 bed + = £4,240.62. Since 6/4/15 SANG payment sought through CIL	Within 5km SPA: 1 bed = £376.86, 2 bed = £492.61, 3 bed = £646.76, 4 bed = £852.47, 5 bed + = £1,019.22.	n/a	There are further tariffs for schemes between 5 and 7km from SPA.
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	Hawley Meadows and Blackwater Park	12.2	610	588	11.7	0.5	22	existing open space with improved access	Joint project with Hart and Rushmoor, capacity is assigned by number of people, divided by 2.5 to give approx number of dwellings
	Swan Lakes	1.94	80	80	1.94	0	0	existing open space with improved access	10ha/1000 people standard
	Station Road, Chobham	19.2	960	102	0.8	18.4	857	existing open space with improved access	SANG expected to be operational Autumn 2015. Does not deliver large (10+) sites in the west of the Borough.
	<b>Total</b>	<b>38.73</b>	<b>1930</b>	<b>1050</b>	<b>19.83</b>	<b>18.9</b>	<b>879</b>		
Waverley Borough Council	Farnham Park	21.25	1104	922	17.7	3.5	182	Existing open space with improved access	
	<b>Total</b>	<b>21.25</b>	<b>1104</b>	<b>922</b>	<b>17.7</b>	<b>3.5</b>	<b>182</b>		
Woking Borough Council	Horsell Common	28	1451	1289.14	24.9	3.1	162		
	White Rose Lane	8.2	425	392.38	7.6	0.6	32		
	Brookwood County Park	20	1036	570.48	11.0	9.0	466		
	Martins Press	13	674	88	1.7	11.3	586		
	Heather Farm	14.5	751	0	0.0	14.5	751		
	Heather Farm (Additional 10.13 ha, capacity 519)								
	<b>Total</b>	<b>84</b>	<b>4336.78756</b>	<b>2340</b>	<b>45.162</b>	<b>38.538</b>	<b>1996.78756</b>		Figures exclude units as part of Victoria Square (392) and new fire station (27). Likely to be allocated to Heather Farm (these proposals are still subject to legal agreement therefore have not been picked up in the monitoring system)
Wokingham Borough Council	Extension to Keephatch Woods, Binfield Road, Wokingham	3.19	166	150	3.19	0.00	0	New open space (as an extension to existing area)	Associated with application F/2007/2517. Site transferred to WBC
	Rooks Nest Woods, Barkham Ride, Barkham							New open space	Site opened March 2011. Site can also avoid impact of large schemes (50+ dwellings) between 5 and 7km of SPA and this is included in dwellings allocated. Part of capacity reserved for sites in Managing Development Delivery Local Plan (Feb 2014).
	Kentwood Meadows, Warren House Rd, Wokingham	18.3	963	578	6.45	11.85	617	New open space	Associated with application O/2011/0699. Lies within N Wokingham SDL and solely serves schemes 5-7km from SPA
	Buckhurst Meadows, London Road, Wokingham	2.7	140	510	2.70	0.00	0	New open space	Associated with application O/2010/1712. Lies within S Wokingham SDL
	Langley Mead (Loddon), Hyde End Road, Shinfield	12.48	650	650	12.48	0.00	0	New open space	Associated with development in S of M4 SDL + The Manor, Shinfield. Approved under F/2010/1434
	Clares Green Field, Croft Road, Spencers Wood	18.31	953	1,097	18.31	0.00	0	New open space	
		5.36	279	147	1.98	3.38	176	Existing open space	Adjoins Five Acre SANG - for delivery as part of S of M4 SDL
	<b>Total</b>	<b>60.3</b>	<b>3151.0</b>	<b>3132.0</b>	<b>45.1</b>	<b>15.2</b>	<b>793.0</b>		

Authority name: **Bracknell Forest Council**  
Date: **Figures end June 2015**

	Number	Value (£)
Total no of dwellings permitted subject to SAMM contribution (start date 14/07/12)		
Total commencements making SAMM contribution (start date 14/07/11)	539	312718

Authority name: **Elmbridge Borough Council**  
Date: **Figures end of June 2015**

	Number	Value (£)
Total no of dwellings permitted subject to SAMM contribution (start date 01/01/10)	79	94,745
Total commencements making SAMM contribution (start date 01/01/10)*	46	49,614

\*this is based on reported data and may not reflect money recorded by HCC at this stage.

Authority name: **Guildford Borough Council**  
Date: **Figures end of June 2015**

	Number	Value (£)
Total no of dwellings permitted subject to SAMM contribution (start date 01/01/10)	1051.06	£ 799,284.82
Total commencements making SAMM contribution (start date 01/01/10)	482.06	£ 371,710.60

Authority name: **Hart District Council**  
Date: **Monitoring figures up to end June 2015**

	Number	Value (£)
Total no of dwellings permitted subject to SAMM contribution (start date 01/01/10)	2251	£934,294.73
Total commencements making SAMM contribution (start date 01/01/10)	664	£512,262.17

monies transferred to HCC

Authority name: **Royal Borough of Windsor and Maidenhead**  
Date: **Figures end of June 2015**

	Number	Value (£)	
Total no of dwellings permitted subject to SAMM contribution (start date 01/01/10)	232	£162,699	This is the amount secured by legal agreement (price base as at the date of the agreement)
Total commencements making SAMM contribution (start date 01/01/10)	121	£124,474.90	This is the actual amount paid including RPI and interest as applicable. Note that the figure of 101 dwellings in the second row of this table may actually represent completions. However, the financial amount is that received from all commencements (payment is due on commencement in all cases).

Authority name: **Runnymede**  
Date: **figures up to the end Aug 15**

	Number	Value (£)	
Total no of dwellings permitted subject to SAMM contribution (start date 01/01/10)	419	263970	From 1 May 2010
Total commencements making SAMM contribution (start date 01/01/10)	Runnymede does not collect on commencement therefore above figure is correct		From 1 May 2010

Authority name: **Rushmoor Borough Council**  
Date: **Figures end of June 2015**

	Number	Value (£)	
Total no of dwellings permitted subject to SAMM contribution (start date 01/01/10) (see note 1)	1055	225842	Note 1: Outstanding and subject to unilateral planning obligation
Total commencements making SAMM contribution (start date 01/01/10) (See note 2)	292	161817	Note 2: Invoiced, or Paid (but not necessarily commenced) current SAMM income received and committed approx £277,228.

Authority name: **Surrey Heath Borough Council**  
Date: **Figures end of June 2015**

	Number	Value (£)	
Total no of dwellings permitted subject to SAMM contribution (from 01/04/2008 to 30/09/2015)	1309	£691,805.36	
Total commencements making SAMM contribution (from 01/04/2008 to 30/09/2015)* (note 1)	621	£373,746.83	Note 1: Paid (but not necessarily commenced)

Authority name: **WAVERLEY BOROUGH COUNCIL**  
 Date: **Figures end June 2015**

	Number	Value (£)
Total no of dwellings permitted subject to SAMM contribution (start date 01/01/10)	413	1,298,060.45
Total commencements making SAMM contribution (start date 01/01/10)	237	644,004.25

Authority name: **WOKING BOROUGH COUNCIL** Figures end of June 2015  
 Date: **figures up to June 2015**

	Number	Value (£)
Total no of dwellings permitted subject to SAMM contribution (start date 01/01/10)	1219	833,423
Total commencements making SAMM contribution (start date 01/01/10)	884	627,156

Authority name: **Wokingham BC**  
 Date: **figures up to the end June 2015**

	Number	Value (£)
Total no of dwellings permitted subject to SAMM contribution (inc schemes 5-7km which pay SAMM) (start date 01/01/10) (value based on assumed mix)	4,443	£2,158,251.91
Total commencements making SAMM contribution (inc schemes 5-7km which pay SAMM) (start date 01/01/10)	476	£414,621.95

Authority name: **Bracknell Forest BC**  
No appeals

Authority name: **Elmbridge BC**  
No appeals

Authority name: **Guildford BC**  
No appeals

Authority name: **Hart District Council**  
Appeals

PINS Ref	Site Adress	Proposal	Decision	Summary of Inspectors Views
APP/N173	Land at Watery Lane, Church Crookham, Fleet, Hampshire, GU52 0RE	Outline planning application for up to 300 residential units, land for up to 1,050m2 D1 floorspace for a GP surgery including pharmacy and up to 370m2 A1 retail floorspace for a convenience foodstore and associated access, open space, playing pitches including a sports pavilion, MUGA and car park, landscaping, Suitable Alternative Natural Greenspace (SANG) including car park and improvements to the A287/Redlands Lane junction (means of access into the main site to be considered, all other matters reserved)	Permission refused, appeal allowed	The Council challenged the adequacy of the proposed SANG - this was the main issue at the appeal. NE did not object to the SANG. The Inspector found that the SANG was adequate.

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Authority name: **Royal Borough of Windsor & Maidenhead Council**  
No appeals

Authority name: **Runnymede BC**  
No appeals

Authority name: **Rushmoor BC**  
Appeals

PINS Ref	Site Adress	Proposal	Decision	Summary of Inspectors Views
APP/P175	65 North Lane, Aldershot	Demolition of existing house and erection of four new 3 bedroom houses.	Dismissed	Amongst other issues, the Inspector was satisfied that a financial contribution is required for identified SANGS. As no such provision had been made, the proposal did not comply with policy CP13 (TBHSPA) of the adopted Core Strategy.

Authority name: **Surrey Heath BC**  
No appeals

Authority name: **Waverley BC**  
tbc



Authority name: **Woking BC**  
No appeals

Authority name: **Wokingham BC**  
Appeals

PINS Ref	Site Address	Proposal	Decision	Summary of Inspectors Views re SPA avoidance measures
APP/X036 0/A/11/21 57754	Land at Kentwood Farm, Warrenhouse Road, Wokingham	Outline application for 274 dwellings and full application for SANG and 3.5m landform with 2.5m fence above alongside A329(M)	Allowed	Scheme provides 50+ dwellings between 5 and 7km from SPA. Therefore since proposal included SANG and Strategic Monitoring contributions at an appropriate rate through a legal agreement, application was acceptable on SPA grounds. Appeal also covered other non-SPA issues.
APP/X036 0/A/12/21 74031	182-186 Finchampstead Road, Wokingham	Construction of 4 five bedroom houses.	Dismissed	Appellant offered unilateral which provides contributions towards addressing SPA impacts which Inspector considered acceptable. Appeal dismissed for other grounds.
APP/X036 0/A/12/21 71789	New Mill Restaurant, New Mill Lane, Eversley, Hook	Erection of 2 dwellings	Dismissed	Site is within 400m of SPA. Appellant contended developing two dwellings would have same impact upon SPA as implementing permitted hotel annexe. View rejected by Inspector as hotel guests unlikely to bring dogs and cats with them. If they did, they would not be allowed to roam therefore having a reduced impact. Inspector concluded the extant permission for the hotel annexe was unlikely to be fully implemented and this influenced consideration of impacts upon SPA of the earlier approval. Appellant did not offer a unilateral agreement to fund delivery of avoidance measures. Therefore appeal dismissed for impacts upon SPA and other matters.
APP/X036 0/A/12/21 78762	451 Finchampstead Rd, Finchampstead, Wokingham	Demolish existing dwelling. Erect 2 dwellings,	Dismissed	Appellant offered a signed S106 which provides contributions towards addressing SPA impacts which Inspector considered acceptable. Appeal dismissed for other grounds.
APP/X036 0/A/11/21 51409	Land west of Shinfield, west of Hyde End Road and Hollow Lane, south of Church Lane, Shinfield	Outline application for a residential development of up to 1,200 dwellings, a further 150 units of specialist housing (including sheltered housing) for elderly persons, a local centre to include a foodstore (2,500 sqm), and other retail and leisure uses, a community building, proposed extension of existing primary schools, erection of a new primary school, public open space, sports pavillion, suitable alternative natural greenspace (SANG) and access and landscaping.	Allowed	Whilst appellant proposed a bespoke solution of SANG which exceeded minimum standards, Secretary of State concluded that proposal should also contribute towards the SAMM project. As appellant accepted this, proposal was allowed due to range of factors.

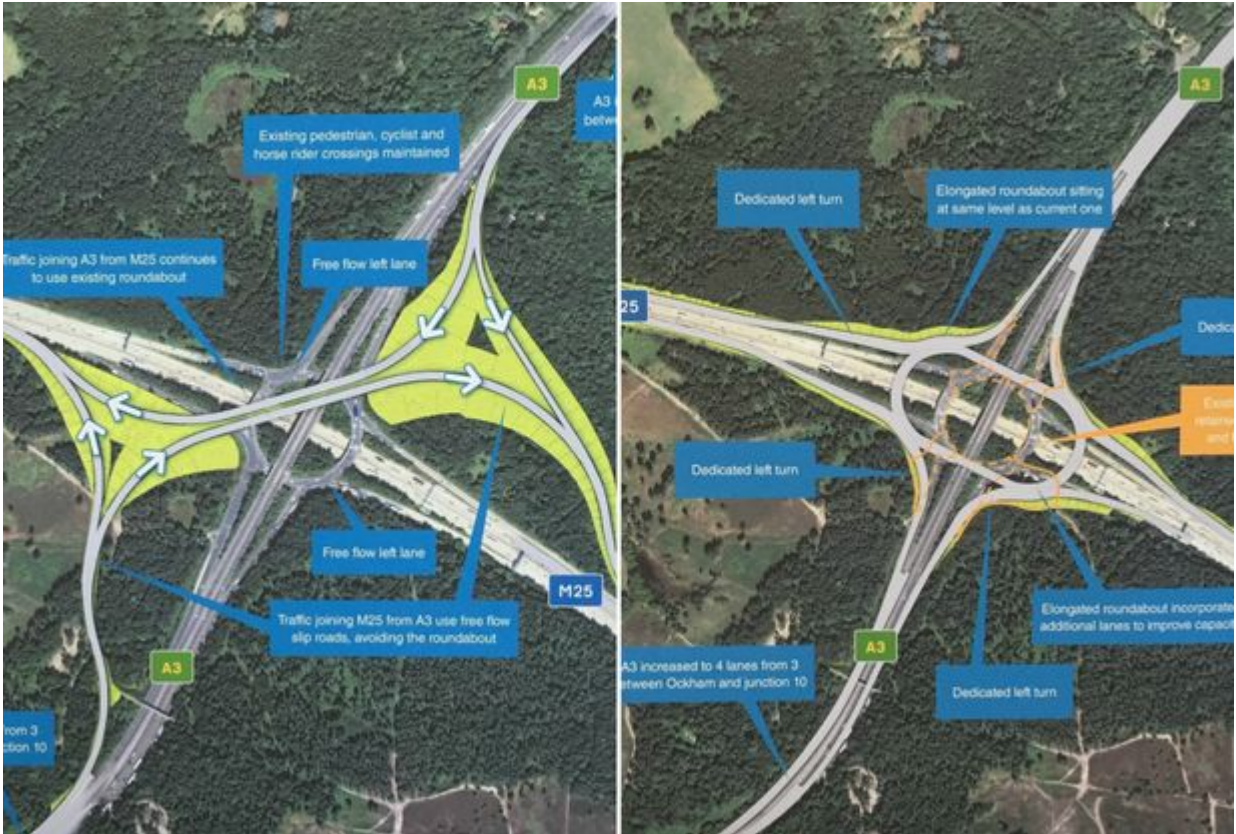
APP/X036 0/A/11/21 51402	Land to the east of Hyde End Rd, Shinfield	Application for change of use of land from agricultural to Suitable Alternative Natural Greenspace (SANG) (Sui Generis use) and associated development to include pedestrian and vehicular access, car park, footpaths and landscaping.	Allowed	Whilst appellant proposed a bespoke solution of SANG which exceeded minimum standards, Secretary of State concluded that proposal should also contribute towards the SAMM project. As appellant accepted this, proposal was allowed due to range of factors.
APP/X036 0/A/12/21 76316	85-87 Ellis Road, Crowthorne	Demolition of existing bungalow and construction of 3 no. 5 bedroom detached houses	Dismissed	Whilst appellant refers to S106 with contributions towards SPA avoidance measures, this was not supplied. Therefore proposal did not address impact upon SPA. Appeal dismissed for this and other reasons.
APP/X036 0/A/12/21 79186	Land south of 3 Pinewood Avenue, Crowthorne	Erection of 2 bed bungalow	Allowed	Requirement for contribution towards SPA avoidance measures was not covered by Officer Report or Decision Notice. Whilst referred to with appendix of Council appeal statement, Inspector did not consider contribution was reasonable or justified.
APP/X036 0/A/12/21 79141	Land at The Manor, Shinfield and bordered by Brooker's Hill to the north, Hollow Lane to the east and Church Lane to the west	Residential development comprising up to 126 dwellings, a sports pavilion, public open space, landscaping and associated works	Allowed	Submitted Unilateral includes a mechanism for contributing towards the Loddon and Ridge SANGS approved in appeals 2151409 (land west of Shinfield) and 2151402 (land east of Hyde End Rd). As the former appeals agreed that SAMM contribution was necessary, this application should also contribute towards SAMM.
APP/X036 0/A/12/21 83100	Land to the rear of The Old Bakery, Basingstoke Road, Spencers Wood	Erection of 3 bedroom house	Dismissed	No agreement to provide contributions towards SPA avoidance measures was submitted. Appeal dismissed for this and other reasons.
APP/X036 0/A/12/21 84090	Land to the rear of 20 Anderson Crescent, Arborfield Cross, Berkshire RG2 9PB	The development proposed is the erection of a new 3 bed detached house on land to the rear of 20 Anderson Crescent, Arborfield Cross.	Dismissed	Although officer report recognised need for application to contribute towards SPA avoidance, this was not covered by the refusal reasons. Inspector therefore disagreed with appellant that SPA was therefore necessary and should be covered in unilateral. Inspector dismissed appeal for other reasons.
APP/X036 0/A/12/21 84573	45 Kiln Ride, Finchampstead, Wokingham, RG40 3PJ	Erection of 2 No. dwellings with parking, access	Dismissed	Inspector accepted scheme was likely to generate cumulative impacts upon the SPA. Since no unilateral detailing contributions to addressing impact had been submitted, this indicated proposal was likely to have impact upon the SPA. Appeal dismissed for this and other reasons.
APP/X036 0/A/12/21 84703	9 Ravenswood Avenue, Crowthorne, Berkshire, RG45 6AX	The development proposed is construction of 2 detached dwelling houses with garages, utilising vehicular access to Ravenswood Avenue previously permitted by Bracknell Forest Borough Council.	Allowed	Requirement for contribution towards SPA avoidance measures covered by Officer Report and application refused for a number of grounds (including lack of contributions towards infrastructure). Unilateral submitted which addressed Council's concerns regarding lack of contributions towards infrastructure (inc SPA). Appeal allowed for this and other reasons.

APP/X036 0/A/12/21 85372	12 Grovelands Road, Spencers Wood, Reading RG7 1DP	The development proposed is the demolition of an existing dwelling and the erection of five dwellings with associated works.	Dismissed	Requirement for contribution towards SPA avoidance measures covered by Officer Report and application refused for a number of grounds (including lack of contributions towards infrastructure). Unilateral submitted which addressed Council's concerns regarding lack of contributions towards infrastructure (inc SPA). Nevertheless other factors indicated appeal should be rejected.
APP/X036 0/A/12/21 87901	Land rear of 56 & 58 Rances Lane, Wokingham, Berkshire RG40 2LH	Formation of new access road and the erection of three detached, five bedroom houses, two detached garage buildings and associated hard and soft landscaping.	Dismissed	Requirement for contribution towards SPA avoidance measures covered by Officer Report and application refused for a number of grounds (including lack of contributions towards infrastructure). Unilateral submitted which addressed Council's concerns regarding lack of contributions towards infrastructure (inc SPA). Appeal dismissed for other reasons.
APP/X036 0/A/12/21 89271	Barkham Manor Farm, Barkham Road, Wokingham, Berkshire RG41 4TG	Erection of an agricultural workers dwelling and garage	Allowed	Requirement for contribution towards SPA avoidance measures covered by Officer Report and application refused for a number of grounds (including lack of contributions towards infrastructure). S106 signed which addressed issues associated with lack of contributions. Appeal allowed for this and other reasons.
APP/X036 0/A/13/21 91900	16 Rowan Drive, Crowthorne, Berkshire RG45 6RZ	Demolition of existing garage and erection of a 2-bedroom chalet style bungalow.	Dismissed	Inspector accepted scheme was likely to generate cumulative impacts upon the SPA. Since no unilateral detailing contributions to addressing impact had been submitted, this indicated proposal was likely to have impact upon the SPA. Appeal dismissed for this and other reasons.
APP/X036 0/A/13/21 92106	182, 184 Finchampstead Road, Wokingham, Berkshire RG40 3EY	Demolition of the existing house at No 184 and the erection of a replacement dwelling and the erection of 2 new dwellings on land at the rear of Nos 182 and 184 Finchampstead Road, new garages and the extension of the access/driveway rearwards	Dismissed	Requirement for contribution towards SPA avoidance measures covered by Officer Report and application refused for a number of grounds (including lack of contributions towards infrastructure). Unilateral submitted which addressed Council's concerns regarding lack of contributions towards infrastructure (inc SPA). Appeal dismissed for other reasons.
APP/X036 0/A/13/21 96507	Fairway, The Devil's Highway, Crowthorne, Berkshire, RG45 6BJ	Erection of 12 no. apartments with associated parking, amenity space and landscaping plus demolition of existing dwelling.	Dismissed	Inspector accepted scheme was likely to generate cumulative impacts upon the SPA. Since no unilateral detailing contributions to addressing impact had been submitted, this indicated proposal was likely to have impact upon the SPA. Appeal dismissed for this and other reasons.
APP/X036 0/A/13/21 96553	145 Nash Grove Lane, Finchampstead, Wokingham, RG40 4HG	Residential development of detached dwellings	Dismissed	No dispute that scheme would harm SPA, however no mitigating measures proposed and therefore appeal dismissed on this and other grounds.

APP/X036 0/A/13/22 03660	Jalens, Nine Mile Ride, Wokingham, Berkshire, RG40 3LU	Construction of detached 4 bed house.	Dismissed	Council has justified reasons for seeking contributing to addressing impacts of proposal upon SPA. Whilst appellant had willingness to provide contributions there was no planning obligation supplied. Appeal dismissed on other grounds.
APP/X036 0/A/13/22 00908	Broughton Farm, Heath Ride, Finchampstead, RG40 3QJ	Demolition of the existing outbuildings and the erection of 2 no. detached dwelling houses	Dismissed	Whilst appellant had supplied a unilateral agreement, it did not define who the owner was. Therefore Inspector concluded agreement would not be enforceable. Whilst appellant had suggested a condition requiring submission of a signed agreement prior to commencement, this was not accepted by Inspector. Appeal dismissed for this and other reasons.
APP/X/03 60/A/13/2 206880	Land at and to rear of 255 and 257 Finchampstead Road, Finchampstead, RG40 3JT	Demolition of 255 & 257 Finchampstead Rd and erection of 6 dwellings	Dismissed	Unilateral undertaking submitted making provision for contributions towards SPA. Appeal dismissed on other grounds.
APP/X036 0/A/13/22 01865	Land on south side of Lower Sandhurst Road, Finchampstead, Berkshire, RG40 3TH	Use of land for 1 n. gypsy pitch	Allowed	Planning obligation providing for contributions towards SPA submitted. This was acceptable.
APP/X036 0/A/13/22 00792	Barkham Road, Wokingham, Berkshire RG41 4TJ	Change of use of field to residential use for a new sustainable dwelling	Dismissed	Unilateral undertaking submitted making provision for contributions towards SPA. Appeal dismissed on other grounds.
APP/X036 0/A/13/21 96342	6 The Village, Finchampstead, Berkshire, RG40 4JT	New dwelling to rear of 6 The Village	Dismissed	Unilateral undertaking submitted making provision for contributions towards SPA. Appeal dismissed on other grounds.
APP/X036 0/A/13/22 09203	Land adjoining Downshire Lodge, Commonfield Lane, Barkham, Wokingham, RG40 4PT	Replacement of 2 permanent gypsy pitches with erection of 3 detached dwellings	Dismissed	Unilateral undertaking submitted making provision for contributions towards SPA. Inspector accepts level of contribution proposed. Appeal dismissed on other grounds.
APP/X036 0/A/13/22 07417	Land to rear of 23a Nine Mile Ride, Finchampstead, Wokingham, Berkshire, RG40 4QD	Change of use of land to caravan site for two gypsy families	Dismissed	Unilateral undertaking submitted making provision for contributions towards SPA. Inspector accepts level of contribution proposed. Appeal dismissed on other grounds.
APP/X036 0/A/13/22 02593	Land adjacent to Waterloo Crossing Cottage, Waterloo Road, Wokingham, Berkshire, RG40 2JU	Erection of one dwelling	Dismissed	Unilateral undertaking submitted making provision for contributions towards SPA. Although Council did not consider undertaking was acceptable as no SANG available for this site within S Wokingham Strategic Development Location, Inspector considered the SANG contribution could be banked. Appeal dismissed on other grounds.

APP/X036 0/A/13/22 01525	Land to west of Twin Oaks, Longwater Lane, Finchampstead, Wokingham, RG40 4NX	Change of use of land to dual pitch gypsy site	Dismissed	No agreement to provide contributions towards SPA avoidance measures submitted. Appeal dismissed for this and other reasons.
APP/X036 0/A/14/22 13704	Land to rear of 29-30 Market Place, Wokingham, Berkshire, RG40 1AP	5 new houses	Dismissed	Although draft Ssection 106 to make contributions towards SPA supplied, it had not been signed. Appeal dismissed for this and other reasons.
APP/X036	Land at 276 Nine Mile Ride, Finchampstead, Wokingham, RG40 3NT	Replacement of derelict house with new house	Dismissed	Although appellany had submitted statement indicating would pay SPA contributions, Inspector did not consider robust unilateral in place. Appeal dismissed on this and other grounds.
APP/X036 0/A/14/22 21136	Land adjacent to 33 Hinton Close, Crowthorne	Demolition of redundant garage and construction of two bedroom bungalow	Dismissed	Inspector accepted Council view of need for Section 106 Agreement to address impacts of scheme upon SPA. No agreement had been supplied. Appeal dismissed for this and other reasons.
APP/X036 0/A/14/22 19204	New Mill House, New Mill Lane, Eversley, Hook, RG27 0RB	Erection of dwelling	Allowed	Although proposal was within 400m of SPA, Inspector accepted proposal involved a replacement dwelling and therefore no impact upon SPA
APP/X036 0/A/13/21 95054	Land at Fairlands, Church Road, Farley Hill Reading, RG7 1UH	Use of land for residential purposes for 4 no. gypsy pitches	Allowed	Inspector accepted scheme was likely to generate cumulative impacts upon the SPA. As unilateral supplied which address impact upon SPA, impacts were addressed.
APP/X036 0/A/14/22 14855	Pineridge Park Homes, Nine Mile Ride, Wokingham, RG40 3ND	Use of land for stationing 22 no. mobile homes	Dismissed	Inspector accepted scheme was likely to generate cumulative impacts upon the SPA. As unilateral supplied which address impact upon SPA, impacts were addressed. Was discussion of whether removal of mobile homes from site would have a beneficial effect upon SPA. Appeal dismissed for other reasons not related to submission of Agreement to fund SPA requirements
APP/X036 0/A/14/22 11709	West Greylake, Part Lane, Riseley, Reading, RG7 1RU	Erection of detached dwelling	Dismissed	Appellant submitted a Unilateral which would fund SPA avoidance measures. Council considered this was ok. As Inspector dismissed appeal for other reasons, did not consider unilateral.
APP/X036 0/A/14/22 28513	Downshire Lodge, Park Lane, Wokingham, RG40 4PT	Conversion of existing house to 3 self-contained residential dwellings	Dismissed	Appellant submitted a Unilateral which would fund SPA avoidance measures. As Inspector dismissed appeal for other reasons, did not consider unilateral.
APP/X036 0/A/14/22 18962	Great Oaks, Fleet Hill, Finchampstead, RG40 4LA	Erection of detached dwelling	Dismissed	Appellant submitted a Unilateral which would fund SPA avoidance measures. As Inspector dismissed appeal for other reasons, did not consider unilateral.

APP/X036 0/A/14/22 11342	45 Kiln Ride, Finchampstead, Wokingham, RG40 3PJ	Erection of 2 dwellings following demolition of existing dwelling	Dismissed	Inspector acknowledged Council view of need for Section 106 Agreement to address impacts of scheme upon SPA. No agreement had been supplied. Appeal dismissed for other reasons and Inspector did not consider whether contributions to address impacts upon SPA were necessary.
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<b>Committee/Panel:</b>	Thames Basin Heaths Joint Strategic Partnership Board
<b>Date:</b>	7 December 2017
<b>Title:</b>	Thames Basin Heaths Financial Statement
<b>Report From:</b>	Administrative Body

**Contact name:** Jenny Wadham, Principal Accountant, Hampshire County Council

**Tel:** 01962 847193

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## 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 2017, and the projected financial position for the three years to 31<sup>st</sup> March 2020, to 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 Account.
- 1.3 As at 31<sup>st</sup> March 2017, the balance in the Endowment Fund was £4.387m, and a further £797,868 was held in the Maintenance Fund, to pay for project expenditure. It is projected that a further £2.057m will be added to Endowment Account in the 2017/18 financial year, giving an anticipated total of £6.444m available to be invested.
- 1.4 Based on current projections of income and expenditure, the balance on the Endowment Fund would increase to £8.978m by 31<sup>st</sup> March 2020, whilst the balance on the Maintenance Fund is expected to increase to £1.379m in the same period.

## 2. Financial Position

- 2.1. The financial position as at 31<sup>st</sup> March 2017 is summarised in the table in Appendix 1, with the projections for the current financial year to 31<sup>st</sup> March 2018 in Appendix 2. A more detailed summary of the projected income for the year to 31<sup>st</sup> March 2018 is shown in Appendix 3.
- 2.2. The balance in the Endowment Fund at the end of March 2017 was £4.387m, and it is projected that a further £2.057m will be added to the Endowment Fund in the 2017/18 financial year, giving a balance of £6.444m at the end of March 2018.
- 2.3. This is based upon projected income receivable in 2017/18 of approximately £2.939m, to add to the £6.573m total income received by the Administrative Body to 31<sup>st</sup> March

2017. This income has been set against costs of £1,388,207 to March 2017, with costs of £451,000 projected for the 2017/18 financial year.

- 2.4. The projected income for the 2017/18 financial year of £2.939m is a significant increase on the £1.614m reported at the previous JSPB meeting. This is primarily due to increased projections for Hart District Council and Woking Borough Council, with the forecast income for these two authorities now £835,000 and £269,000 higher respectively than the original budgeted levels.
- 2.5. The projected costs have increased by £4,000 to £451,000 since the previous outturn. This includes a £20,000 increase in staffing costs, offset by a £16,000 reduction in project costs.
- 2.6. The increase in forecast staffing costs is salary costs, mainly as a result of pay inflation (£13,000), additional staff training (£2,500), a slight increase in rent following the move to new office premises at Heather Farm (£1,000), and spend on mobile devices to facilitate the SANG survey work and increase warden productivity (£3,500).
- 2.7. The reduction in project costs is due to a lack of eligible SANG sites during the summer 2017 for the surveys (£25,000), and an underspend on promotions, events and workshops due to staff sickness (£4,000), offset by additional spend on people counters (£7,500) and GPS personal safety devices (£5,500).
- 2.8. The balance in the Maintenance Account at 31<sup>st</sup> March 2017 net of expenditure incurred and paid to date was £797,868. A net contribution to the Maintenance Account of £430,451 is projected in 2017/18, increasing the expected balance to £1,228,319 at the end of March 2018. 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 2018/19 and 2019/20 Financial Years**

- 3.1. The projected financial position for the 2018/19 and 2019/20 financial years is shown in Appendix 4.
- 3.2. In the SAMM business plan it was envisaged that approximately £1.6m annual tariff income would be required to meet the ongoing expenditure costs, whilst 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 2018/19 and 2019/20 financial years is £2.1m and £1.5m respectively, based on information provided by each of the partners.
- 3.3. 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 £460,000 per annum, based on current approved staffing and activity levels.
- 3.4. 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 at full approved staffing levels of six full time and six seasonal workers, a communication officer and a project manager.

- 3.5. Based on the current projections of income and expenditure, the Endowment Fund balance is expected to increase over the next three financial years to £8.978m by March 2020, as shown in Appendix 5. The balance within the Maintenance Fund is expected to increase to £1.379m, and as stated above, this could be transferred to the Endowment Fund, but does provide assurance that should actual income fall below projected levels, full staffing levels and therefore delivery can be maintained.

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

- 4.1. Tariff income is collected by LPAs and passed to the Administrative Body. This tariff income is used to fund current project expenditure (the Maintenance Account) and to accumulate sufficient balances to fund future project expenditure and the cost of long term maintenance and protection of the SPA (the Endowment Account).
- 4.2. 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.
- 4.3. 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.
- 4.4. Fund balances are currently held by the Administrative Body, receiving interest at a rate of 0.25%. 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 0.5% after the recent rate rise.

#### **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 2020 is noted.
- 5.2. If deemed appropriate, the Board is asked to provide direction as to how and from whom the services of an independent financial advisor are to be procured.

## Appendix 1 - Financial Summary to 31 March 2017

<b>Income</b>	<b>Cumulative to 2014/15 £</b>	<b>2015/16 £</b>	<b>2016/17 £</b>	<b>Total £</b>
Bracknell Forest BC	287,230	201,542	729,955	1,218,727
Elmbridge BC	45,557	50,483	151,164	247,204
Guildford BC	469,325	177,310	147,644	794,279
Hart BC	422,559	208,010	99,197	729,766
Runnymede BC	64,260	132,930	88,200	285,390
Rushmoor BC	197,210	144,881	142,761	484,852
Surrey Heath BC	401,960	135,781	90,017	627,758
Waverley BC	108,326	31,261	71,338	210,925
Windsor & Maidenhead RB	101,292	28,372	13,249	142,913
Woking BC	388,916	62,691	45,461	497,068
Wokingham BC	411,097	57,799	825,511	1,294,407
Interest	13,366	13,059	12,991	39,416
<b>Total Income</b>	<b>2,911,098</b>	<b>1,244,119</b>	<b>2,417,488</b>	<b>6,572,705</b>
<b>Expenditure</b>				
Project Co-ordinator Natural England	26,058	0	0	26,058
Project costs Natural England	530,281	236,629	420,758	1,187,669
Administration fee Natural England	29,000	20,320	10,160	59,480
Financial Administration HCC	75,000	20,000	20,000	115,000
<b>Total Expenditure</b>	<b>660,339</b>	<b>276,949</b>	<b>450,918</b>	<b>1,388,207</b>
<b>Net Income/(Expenditure)</b>	<b>2,250,759</b>	<b>967,170</b>	<b>1,966,570</b>	<b>5,184,498</b>

**Appendix 2 – Projected Financial Summary for the year to 31 March 2018**

<b>2017/18</b>	<b>Budget</b>	<b>Actuals to end of October</b>	<b>Outturn Forecast</b>	<b>Variance to Budget</b>
<b>Income</b>	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Bracknell Forest BC	248,904	107,343	248,904	0
Elmbridge BC	19,360	6,898	30,000	10,640
Guildford BC	170,000	94,168	170,000	0
Hart DC	32,100	0	867,322	835,222
Runnymede BC	47,754	8,820	88,250	40,496
Rushmoor BC	281,788	164,434	281,788	0
Surrey Heath BC	142,676	153,645	153,645	10,969
Waverley BC	0	12,218	64,734	64,734
Windsor & Maidenhead RB	27,720	0	27,720	0
Woking BC	193,158	(40,403)	462,424	269,266
Wokingham BC	450,296	153,027	524,486	74,190
Interest	20,000	0	20,000	0
<b>Total Income</b>	<b>1,633,756</b>	<b>660,150</b>	<b>2,939,273</b>	<b>1,305,517</b>
<b>Expenditure</b>				
Natural England Staff Costs	350,069	214,010	370,282	20,213
Natural England Project Costs	65,350	7,799	49,468	(15,882)
Natural England Admin Fee	11,581	0	11,581	0
HCC Admin Fee	20,000	0	20,000	0
<b>Total Expenditure</b>	<b>447,000</b>	<b>221,808</b>	<b>451,331</b>	<b>4,331</b>
<b>Net Income/(Expenditure)</b>	<b>1,186,756</b>	<b>438,342</b>	<b>2,487,942</b>	<b>1,301,186</b>

**Appendix 2 – Detailed Income Summary**

	2017/18						
	Previous years	Budget	Actuals to date	Notified contributions	Forecast qtr 4	Projected total	Variance
	£	£	£	£	£	£	£
<b>INCOME</b>							
Bracknell Forest BC	1,218,727	248,904	107,343	0	141,561	248,904	0
Elmbridge BC	247,204	19,360	6,898	(7)	23,109	30,000	10,640
Guildford BC	794,279	170,000	94,168	0	75,832	170,000	0
Hart DC	729,766	32,100	0	867,322	0	867,322	835,222
Runnymede BC	285,390	47,754	8,820	79,430	0	88,250	40,496
Rushmoor BC	484,852	281,788	164,434	0	117,354	281,788	0
Surrey Heath BC	627,758	142,676	153,645	0	0	153,645	10,969
Waverley BC	210,925	0	12,218	52,516	0	64,734	64,734
Windsor & Maidenhead RB	142,913	27,720	0	0	27,720	27,720	0
Woking BC	497,068	193,158	(40,403)	502,827	0	462,424	269,266
Wokingham BC	1,294,407	450,296	153,027	262,362	109,096	524,486	74,190
Interest	39,417	20,000	0	0	0	20,000	0
<b>Total Income</b>	<b>6,572,705</b>	<b>1,633,756</b>	<b>660,150</b>	<b>1,764,450</b>	<b>494,672</b>	<b>2,939,273</b>	<b>1,305,517</b>
<b>Maintenance Fund</b>	<b>2,186,075</b>	<b>484,127</b>				<b>875,782</b>	
<b>Endowment Fund</b>	<b>4,386,631</b>	<b>1,129,629</b>				<b>2,043,491</b>	

#### Appendix 4 – Projected Income and Expenditure 2017/18 to 2019/20

<b>Income</b>	<b>Previous years £</b>	<b>Projected 2017/18 £</b>	<b>Projected 2018/19 £</b>	<b>Projected 2019/20 £</b>
Bracknell Forest BC	1,218,727	248,904	615,564	440,424
Elmbridge BC	247,204	30,000	70,000	25,000
Guildford BC	794,279	170,000	170,000	45,246
Hart BC	729,766	867,322	130,427	130,427
Runnymede BC	285,390	88,250	59,185	35,875
Rushmoor BC	484,852	281,788	395,369	338,578
Surrey Heath BC	627,758	153,645	0	0
Waverley BC	210,925	64,734	0	0
Windsor & Maidenhead RB	142,913	27,720	56,595	56,595
Woking BC	497,068	462,424	193,158	193,158
Wokingham BC	1,294,407	524,486	379,508	235,261
Interest	39,416	20,000	25,000	25,000
<b>Total Income</b>	<b>6,572,705</b>	<b>2,939,273</b>	<b>2,094,806</b>	<b>1,525,564</b>
<b>Total Expenditure</b>	<b>1,388,207</b>	<b>451,331</b>	<b>473,087</b>	<b>462,367</b>
<b>Net Income/(Expenditure)</b>	<b>5,184,498</b>	<b>2,487,942</b>	<b>1,621,719</b>	<b>1,063,197</b>

## Appendix 5 – Projected Endowment Fund Balance

	<b>2016/17 Actuals £</b>	<b>2017/18 Projected £</b>	<b>2018/19 Projected £</b>	<b>2019/20 Projected £</b>
Income	2,417,490	2,939,273	2,094,806	1,525,564
70% to Endowment Fund	1,693,909	2,057,491	1,466,364	1,067,895
30% to Maintenance Fund	723,581	881,782	628,442	457,669
Expenditure	450,918	451,331	473,087	462,367
<b>Maintenance Fund:</b>				
Balance brought forward	525,205	797,868	1,228,319	1,383,674
Transfer from/(to) income	272,663	430,451	155,355	(4,698)
<b>Balance carried forward</b>	<b>797,868</b>	<b>1,228,319</b>	<b>1,383,674</b>	<b>1,378,976</b>
<b>Endowment Fund:</b>				
Balance brought forward	2,692,722	4,386,631	6,444,122	7,910,486
Transfer from/(to) income	1,693,909	2,057,491	1,466,364	1,067,895
<b>Balance carried forward</b>	<b>4,386,631</b>	<b>6,444,122</b>	<b>7,910,486</b>	<b>8,978,381</b>