



Report to the Partnership for South Hampshire Joint Committee

Date: 25 January 2021
Report of: Paddy May, SRMP Board Chair
Anna Parry, Partnership Manager
Subject: SOLENT RECREATION MITIGATION PARTNERSHIP (BIRD
AWARE) STRATEGY

SUMMARY

The purpose of this paper is to update the Joint Committee on the work that has been done regarding the financial protocol decision, taken in September, and to propose a way forward for making good any potential deficit in contributions.

This paper also seeks approval from the Joint Committee for the Solent Recreation Mitigation Partnership 2021/22 budget request, a matter that is considered annually by the PFSH Joint Committee.

This paper also presents the findings of the first Strategy and Financial Review of the Partnership and seeks approval of these findings. These reviews will be repeated throughout the lifetime of the Strategy to ensure the Strategy remains relevant, the partnership is operating within its means and the Strategy continues to represent best practice.

RECOMMENDATION

It is RECOMMENDED that the Joint Committee: -

- a) NOTES and ENDORSES the Solent Recreation Mitigation Partnership's proposed method of making up any potential budget deficit should the need arise;
- b) NOTES and ENDORSE the Solent Recreation Mitigation Partnership's proposed budget for 2021/22;
- c) NOTES and ENDORSES the Solent Recreation Mitigation Partnership's proposal to move to a 5 yearly monitoring programme if the results of the initial 5 years of annual monitoring indicate that the Partnership is having a positive effect;
- d) NOTES and ENDORSES the Solent Recreation Mitigation Partnership's proposal to move the Site Specific Project list to become something that's more 'live' past the award of the initial three years of grants; and

- e) NOTES and ENDORSES the Solent Recreation Mitigation Partnership's request for more active involvement from all Partners.

FINANCIAL PROTOCOL UPDATE

Introduction

1. At the PfSH Joint Committee meeting in September, a financial protocol was agreed in principle that would allow the Bird Aware Partnership to seek approval from the Joint Committee to use in-perpetuity funds to cover day-to-day running costs in the short term, with a commitment that all money drawn down from this fund would be replaced (with interest) at the first possible opportunity.
2. The need to create this protocol had arisen as a result of the current delays in the local planning process brought about by issues pertaining to nitrate neutrality. It is expected that planning application numbers to 2034, as a total, remain unchanged so there is a strong expectation that once these issues are resolved, then the income stream to the Bird Aware Partnership (made up entirely of developer contributions) will resume and all money drawn down from this fund can be replaced from this source. In short, this is being seen as a temporary cash-flow issue.
3. It is also expected that many of the issues related to nitrate neutrality delaying planning permissions will be resolved within the next financial year, which is adding to the perception that the impacts of this to the Partnership are temporary.

Importance of Continuing Business as Usual

4. All indications suggest that over the duration of the Partnership's life (collecting contributions until March 2034 and operating under the in-perpetuity arrangements until March 2114) the housing forecasts will come forward and that therefore this financial situation should just be temporary. Recent re-evaluation of the financial model underpinning the Strategy reconfirmed this position too.
5. The Partnership has taken time to build up momentum and a strong dedicated team. It has been recognised at a national and local level, winning several awards for the work it delivers.
6. The Partnership comprises of 19 Partners, of which 4 are nature conservation bodies. These organisations are adamant that commitments must be given by LPA Partners to make good any draw down of funds, should the Partnership itself fail to be able to provide them.
7. Whilst the Partnership could look to cut costs and scale down operations in the short term, the nature conservation bodies consider that the current level of mitigation provided cannot be scaled back in any way, else they have put the Partnership on notice that they may need to form objections to future planning applications. Therefore it is considered preferable to continue operating at the current level, whilst closely monitoring this situation moving forward.

Making Good Any Deficit

8. There is a small risk that planning applications to 2034 will not recover in line with expectations and the level of contributions to the fund will not be recovered as expected, at which point the drawn down money will still need replacing. Currently this would leave Fareham Borough Council (in their capacity of Accountable Body for the Partnership) potentially at financial risk to make good the deficit. Therefore it was agreed at Joint Committee that should this situation arise, then all local planning authority partners would contribute to make good any deficit and that a mechanism for this should be put in place to protect Fareham.

9. Whilst there is a formal mechanism for determining any financial contributions, currently there is not a similar mechanism which details how any deficits would be made good. This is a direct result of the positive assumptions made at the time of writing the Strategy that such a need would never present itself.
10. Now that we are in a position where there is a need to consider this possibility, there would seem to be several different options for how this might best be proportioned between LPAs:
 - a. PfSH contributions are based upon populations of either the whole LPA or the percentage of the LPA that falls within its area. This would not seem to be suitable as the PfSH area does not directly mirror that of the Bird Aware zone of influence. However, this model could be applied to the population of the areas within the zone of influence.
 - b. Historical quarterly records of developer contributions are kept. These could be used to calculate the average percentage income the LPA contributes, then that be the proportion that the authority contributes in the case of the need to make good any deficit.
 - c. Projections of future residential developments for each area have been collated. These could be used to calculate the average percentage income the LPA is expected to bring forward and this could be the proportion that the authority contributes in the case of the need to make good any deficit.
11. Having sought advice from local authority partners, it is recommended that option C is taken forward because this is the best approximation to the likely future contribution to the fund and is based directly upon information they have previously provided to the Partnership.

BUDGET REQUEST

Background

12. The Solent Recreation Mitigation Partnership's (SRMP) work is wholly funded by developer contributions.
13. The Partnership is continuing to grow, and an extract from the 2019/20 Annual Review showcases some of the achievements of the team, during a period when the following activities were undertaken:

Achievement	Figure
Site visits	871
Total number of people engaged with during site visits	11,147
Percentage of people who responded positively to Rangers on site	95.9
Leaflets distributed by rangers during site visits	2,927
Leaflets distributed via leaflet boxes/local organisations	3,812
Community events attended	44
Number of people engaged with at events	1,826
Twitter followers at 31 st March 2020	1,749
Facebook followers at 31 st March 2020	1,231

Achievement	Figure
Instagram followers at 31 st March 2020	810

14. The amount which will be received in the future cannot be accurately predicted, so a judgement needs to be made annually on an appropriate budget for the coming year. Information collected quarterly related to developer contributions received, and annual planning permission data, helps inform the budget for each coming year.
15. Additionally the board maintains a financial reserve to cushion the peaks and troughs in development activity and thus money received by the Partnership. This means that if income is lower than outgoings in 2021/22, in the first instance money from the reserves would be used to meet any shortfall.
16. Currently the Partnership is aware that there are a number of planning applications awaiting permission once a strategic solution to the Nitrates issue is in place. This is having an impact upon our income, which is perceived to be temporary, and should resolve itself once a solution is established. Therefore the Partnership recognises that in accordance with the proposal endorsed by PfSH in September, it may have to temporarily draw upon funds from the in-perpetuity account to sustain activities throughout the coming year. As per the proposal, these will be replaced (with interest) at the first opportunity.
17. The proposed budget for 2020/21 is £1,992k, which includes a £1,110k contribution to the in-perpetuity fund, leaving £882k for the implementation of mitigation measures. These measures include a team of 5 all year Rangers, further supported by 3 seasonal Rangers during the winter, a Brand and Communications Officer, a Dog Initiatives Leader and the Partnership Manager. For the second time, they also include £400k to support site specific projects as endorsed by the PfSH Joint Committee in July 2019. The in-perpetuity fund is part of the agreed Strategy and vital to allow for the work of the Partnership to continue until 2114, whilst payments into the scheme are due to halt in 2034.
18. The budget will also fund the vital monitoring surveys and data collection activities which will be taking place during winter 2021/22. Furthermore, it provides for the development of targeted engagement activities with dog owners and walkers, as research shows that around 47% of all major disturbance incidences involve a dog off the lead.

19. The proposed budget for 2020/21 is therefore:

Table 1: Proposed 2021/22 budget

<i>Item</i>	<i>000s</i>
Rangers	287
Dog initiatives	10
Partnership Manager (0.6 f.t.e.)	35
Operating budget	10
Monitoring	20
Brand and Communications Lead	45
Comms operational budget	10
Graphic Design Support	15
Additional Post (Dog Initiatives Lead)	40
Site Specific Projects ¹	400
Sub-total	882
Contribution to in-perpetuity fund	1110
Total budget	1992

Differences from 2020/21 Budget

20. The proposed budget for 2021/22 sees a very similar request to that of 2020/21 (1997k). This is because the Strategy is already in full delivery mode and therefore the main activities of the Partnership remain unchanged.

21. The monitoring budget is smaller this year than last (£20k as opposed to £35k) which reflects the fact that the planned monitoring for this winter (which will be largely paid for in the next financial year) will have the fieldwork element undertaken by the Rangers, with consultancy support for work planning and report writing. This is in line with the decision taken by the Project Board in June 2020 and reflects the fact that COVID is likely to impact on coastal access

¹ This is in addition to the initial £400k allocated for these works in 2020/21. Due to COVID related delays with these initial schemes, many of them will still be drawing upon the original funding allocation during 2021/22.

patterns and consequently any results will be anomalous and therefore won't feed into the initial 5 year monitoring data.

22. The Dog Initiatives budget is less than previous years as to date this group has made a £10k annual contribution to the costs of the access management assessments. As these are not taking place over the winter of 2020/21, they will not need paying for in the next financial year, hence this element has been removed.

For information

23. The reserve fund balance reduced in the last financial year, whilst the in-perpetuity fund has grown:

Reserves brought forward @ 31/03/19	878,264
Contribution from reserves 19/20	(455,641)
Reserves carried forward @ 31/03/20	<hr/> 422,624 <hr/>
In-perpetuity fund @ 31/03/19	990,937
Transfer in 19/20	750,000
Interest received	8,146
In-perpetuity fund @ 31/03/20	<hr/> 1,749,083 <hr/>

STRATEGY AND FINANCIAL REVIEW

Introduction

24. The Bird Aware Strategy (also known as the Solent Recreation Mitigation Partnership Strategy) was endorsed by PfSH in December 2017 and came into operation on 1st April 2018, replacing an interim strategy which had been in operation since 2015.

25. At the time the Strategy was endorsed, it was agreed that as well as regular 5 yearly reviews, an initial review of its effectiveness would take place within the first three years of operation. This report forms the initial review of the Strategy.

Approach to Review

26. With the exception of work related to financial matters pertaining to the Strategy (outlined in more detail below), the main approach to this review has centred around an implementation review and a literature review of other similar mitigation schemes strategies, both of which form **Appendix 1** of this paper.

27. As the Partnership is still collating the first 5 years' worth of operational monitoring data, this review has not sought to fundamentally change the overall approach to delivery. Further action may be taken once the monitoring data results of this initial period are available and have been reviewed.

Financial Review

28. During 2019/20 a financial review was undertaken of the Strategy. This identified that the original financial model may not be robust enough to bring in the required income to support all planned activities for the entirety of the in-perpetuity period.
29. This finding has been central to the Strategy Review, as taking corrective action at this point is crucial to ensure that it remains fit for purpose for its lifetime.
30. The Bird Aware strategy mitigates the recreational impact of new housing up to 2034, but the mitigation measures need to be in place for the duration of the impact. The Partnership decided, in agreement with Natural England, that this 'in-perpetuity' payment should be calculated on an 80 year basis.
31. The strategy therefore includes a mechanism for funding the mitigation measures after 2034 when the developer contributions from those planned new homes will come to an end. A proportion of the money received each year from developer contributions is transferred into an investment fund. The 'in-perpetuity fund' will grow each year through those annual cash transfers and the interest earned with the intention that by 2034, the fund will be sufficiently large to fund the mitigation measures in-perpetuity.
32. The amount which needs to be transferred into the in-perpetuity fund each year to 2034 is determined by a number of key variables:
 - The annual cost of the mitigation measures during the ensuing in-perpetuity period
 - predicted interest rates during that same period
 - predicted rate of inflation
 - The number of planning applications in the designated area
 - The rate of developer contribution per property
33. As part of this Strategy Review the previous financial review has been revisited and the assumptions behind the key variables have been reviewed. A key part of this work was getting the partner authorities to review anticipated annual planning applications to 2034 and incorporating this into the financial model.
34. **The result is that the existing levels of contributions, along with the currently policy to raise them annually by the level of inflation, should enable the in-perpetuity fund to finance the work of the partnership over the full period.** However, any changes in the assumptions used can have a significant impact on affordability so regular monitoring is recommended to ensure the model reflect actual performance.
35. The existing financial model is based on a flat rate contribution of £564 per dwelling as per the initial partnership arrangements. Subsequently a staggered contribution level was agreed from 2018/19 based on the number of bedrooms in a property. The staggered rates were intended to provide the same total income as the flat fee. As part of the review partner organisations have also included a breakdown of future planning applications broken down by the number of bedrooms. Therefore the model has been updated to reflect the staggered contribution levels to ensure income forecasts reflect current practices.
36. In the existing model, no inflation has been added to income in the period up to 2034 despite the fact that annual inflationary increases are added to the contributions. The reasoning behind this is that the partnership costs from 2034

are presented at 2016 prices so to inflate the income would not be consistent. Presenting the expenditure in 2034 at 2016 prices has a significant positive impact over the life of the model as the 2% inflation to 2114 starts from a lower base rate. In the later years of the model, due to the annual 2% increase, the partnership expenditure increases significantly so keeping the base low is beneficial. The model has been updated to include both inflation income and operating expenditure over the full in-perpetuity period.

37. This means that the current £1.1M annual contribution to the in-perpetuity fund will need to increase in line with inflation, rising to £1.6M by 2034.
38. A capital expenditure budget of £400K per year up to 2034 has been included in the model to implement mitigation projects across the region.
39. It is proposed to keep inflation at 2% which remains the government's long-term target.
40. The current Bank of England interest base rate is 0.1%. The Council's Treasury advisors forecast that the Bank of England base interest rate will remain low for the foreseeable future. The model is based on generating interest of 0.5% for the next two years and then slowly increasing to around 3% by 2034. Long-term interest rate forecasts are rarely made due to the unpredictability of future economic conditions. The original model was predicated on interest rates slowly increasing from the current historic lows to a rate of 3% by 2034. In order for the current strategy to be affordable the long-term interest rate after 2034 will need to average 3.3%.
41. Currently the built-up partnership funds are held by Fareham Borough Council and returns are based on interest generated through their Treasury function. A formal investment strategy for the partnership could be created focused on long-term returns. This could create more favourable returns at an appropriate level of risk over the life of the partnership.
42. **The assumptions and forecasts described above lead to a model that enables the work of the Partnership to continue for 80 years past 2034.** Changes to any of the inputs will impact on the modelling over the life of the partnership. If expenditure increases, there will need to be off-setting favourable variation such as an increase in income, for example, e.g. from a fee increase in developer contributions or interest returns. If income was to increase then the proposed expenditure of the partnership could also increase.
43. The impact of Covid-19 on the economic climate could impact on the model in terms of the number of new developments being approved and the housing mix of those developments. It could also impact on the long-term inflation rates and interest rates. The model is very sensitive to changes in those rates over the long-term, therefore the economic impact of Covid presents a risk to the sustainability of the model. This will need to be appropriately monitored and reviewed as the situation develops.
44. The annual contribution to the in-perpetuity fund is based on the average annual planning application numbers in the period to 2034. If in any year the application numbers are above or below the average then the level of contributions available to contribute to the in-perpetuity fund can be managed through the use of other partnership reserves. However, there is a risk that if planning applications are below the average then there will not be the resources available for the partnership to make the contribution at the level required in the model in a particular year. Over the period to 2034 the contributions should average out but

there will be an adverse impact on interest received if contributions have to be reduced in the earlier years that are subsequently recovered in later years.

Celebration of Partnership Successes to Date

45. The Partnership has been recognised as a leading mitigation scheme. To this end it has received the following accolades:

- International Green Apple Award for Environmental Best Practice - Winner 2020
- Institute of Environmental Managers and Assessors - Sustainability Campaign, Public Sector 2020 Winner
- Drum Awards for Social Media 2020 - Highly Commended
- National Planning Awards - Planning for the Natural Environment - 2019 Winner
- Royal Town Planning Institute South East Region - Planning for the Natural Environment - Winner 2018
- Royal Town Planning Institute South East Region - Awards For Planning Excellence - Regional Winner 2018
- St Andrews International Prize for the Environment 2020 - Shortlisted

46. At the time of writing this (December 2020) the Partnership is also shortlisted for the following award and the final results are still awaited:

- Chartered Institute of Ecology and Environmental Managers - Best Practice, Stakeholder Engagement - result expected January 2021

47. Alongside that, it has a highly dedicated and motivated team who are utilising limited resources to make a positive impact in reducing bird disturbance along the Solent Coast. Feedback from coastal users has largely been very positive towards the aims of the Partnership and Rangers records show that around 95.9% of people they engage with are receptive to the key messages they share.

48. The Partnership has to a certain extent 'learnt on the job' and is now in a position to utilise experiences to date to optimise resources and plan productive engagement work throughout the entire year, with a strong focus on coastal interactions during the winter season.

49. Relationship building takes time, and the team have been able to build strong positive connections with key landowners and stakeholders across the entire coastal stretch. New contacts are still being found (particularly for those who lead coastal user groups such as sailing clubs and the like) and these are always welcome and engagement with them is nurtured.

50. All Partners have remained committed to the Partnership. Governance and the internal hierarchy of Project Board, Steering Group and various Task and Finish groups continue to support the work of the Partnership and allow it to remain progressive.

51. The fact that the vast majority of developers are opting into the scheme, to provide the mitigation required for their project to achieve planning permission, indicates that it is also providing a useful mechanism for this sector.

Flagging up of non-financial concerns

52. These are all covered in more detail within the Strategy Review itself, with the 'What's gone wrong - how can it be avoided?' section, but the general areas they cover are:

Disturbance monitoring – the survey locations were chosen when the project was still theoretical. With operational experience new sites should be selected for monitoring purposes after the first 5 years of data has been collected. A recommendation is made that monitoring is more comprehensive, but only undertaken every 5 years (as done by some other mitigation partnerships).

The costs of monitoring are also higher than originally modelled for, but there is a need to contract with quality consultants who understand disturbance issues. Therefore, upon the suggestion of Procurement, the Partnership now weight 'value' rather than 'price' highly when scoring tenders. Undertaking comprehensive monitoring on an intermittent basis will also help reduce overall costs in this area.

Site Specific Projects - these are in their initial stages of delivery, and so far are progressing well. However there is already concern about how best to keep the project list 'live', and evolving, such that at each point of financial award the Partnership is able to be confident it is supporting the best opportunities and projects.

Reactive not proactive - partnership staff represent a relatively small team to cover such a large area and so many different work streams. As there are an estimated 13 million visits to the Solent coast each winter, this is a huge number of visits for the team to be trying to influence.

Rangers are spread thinly to cover so much ground geographically and maintain successful working relationships with all stakeholders across the region. This can result in a tendency to work with those that approach the Partnership and who are easy/ keen to get involved rather than being able to target the locations/ organisations that Partnership staff feel would most benefit the aims of the project.

There are many simultaneous projects and work streams running alongside each other; it is unrealistic with current staffing levels to carry them all out to a high standard, to maintain cohesion and stay focused on priorities. This can only really be rectified through more staff or a reduced level of projects, through prioritisation.

Partner Involvement

Partnership staff need to see a much more consistent level of involvement from all Partners, particularly at Steering Group level as there is a tendency for some Partners to be more proactive and engaged with the work of the Partnership than others.

This causes a potential imbalance in what can be achieved in different areas and concern is raised that this will only increase over time if corrective action is not taken soon.

Comment from Natural England

53. As part of this review process, Natural England have been asked to comment directly on this matter. They have confirmed that if the conclusions of the financial review are adopted, it will continue to provide appropriate mitigation. Their response is here in full:

'Natural England is an active member of the Solent Recreation Mitigation Partnership and Bird Aware Solent. We welcome this financial review that ensures necessary funding continues to be available to deliver adequate mitigation for the lifetime of the development.

Provided that the conclusions of the financial review are adopted, it is Natural England's view that the Solent Recreation Mitigation Strategy will continue to provide appropriate mitigation for the effects of recreational impacts on the designated sites as a result of new development.

We welcome working with the partnership on further reviews of the strategic solution in due course.'

RECOMMENDATIONS

It is RECOMMENDED that the Joint Committee: -

- a) NOTES and ENDORSES the Solent Recreation Mitigation Partnership's proposed method of making up any potential budget deficit should the need arise;
- b) NOTES and ENDORSE the Solent Recreation Mitigation Partnership's proposed budget for 2021/22;
- c) NOTES and ENDORSES the Solent Recreation Mitigation Partnership's proposal to move to a 5 yearly monitoring programme if the results of the initial 5 years of annual monitoring indicate that the Partnership is having a positive effect;
- d) NOTES and ENDORSES the Solent Recreation Mitigation Partnership's proposal to move the Site Specific Project list to become something that's more 'live' past the award of the initial three years of grants; and
- e) NOTES and ENDORSES the Solent Recreation Mitigation Partnership's request for more active involvement from all Partners.

Appendices: Appendix 1 – Solent Recreation Mitigation Partnership Strategy

ENQUIRIES:

For further information on this report please contact:-

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Solent Recreation Mitigation Partnership



Strategy Implementation Review

Autumn 2020

Strategy Implementation Review Autumn 2020

The Partnership was established to create and deliver a mitigation strategy in relation to recreational disturbance of the Solent SPAs arising from planned new housing development.

When the work of the Partnership was first endorsed by PfSH (or PUSH as it was at the time) it was noted that the first 5 years of work would need close monitoring in order to be able to ascertain if it's being effective in the delivery of mitigation. The Partnership is still operating within this initial 5 years and therefore can't yet draw full conclusions related to effectiveness.

Instead, this review draws on experience to date from operating the Partnership and seeks to highlight the intended direction of travel and further proposed changes that may bring about greater returns.

GAP ANALYSIS - Process	
Do the project results match original objectives?	The Partnership has set out to have a proactive voice speaking up for the needs of the birds, alongside an assured mechanism for developers to be able to meet the mitigation requirements of the Habitat Regulations. Both of these aims are being delivered by the Partnership.
Are expected deliverables being delivered?	<p>Since the Interim Strategy was first implemented, the following has been delivered:</p> <ul style="list-style-type: none"> • 22,478 residential planning permissions making use of the scheme (it is important to remember that the scheme is still operated on an 'opt in' basis, with developers free to bring forward their own bespoke mitigation approach if they wish). • 2,439 site visits by the rangers to coastal areas • 38,172 engagements with the public • 131 community events attended • 18,506 leaflets distributed <p>Although no estimates for these figures were published prior to the start of implementation, these achieved figures are commendable. This is recognised internally, amongst partnership peers and has achieved independent recognition in the form of both local and national awards.</p> <p>In light of the anticipated impact of COVID-19 on the ability of the Ranger team to directly engage with coastal</p>

	users, it is likely that for the duration of the pandemic, direct engagement figures may fall, but other engagement techniques such as greater use of social media, creation of bespoke on site information and delivery of targeted onsite interventions will increase.
How can gaps be closed?	Currently no gaps between objectives and deliverables have been identified. However, as later discussed within this exercise, there are areas being considered for improvement.
ACHIEVEMENT OF GOALS	
Does the Partnership function as expected?	<ul style="list-style-type: none"> • Effective delivery of the full Strategy at the current level of developer contribution sees the need for partner organisations to be willing to provide some support services. Many of these (procurement, hosting of staff and finance) are provided to a high level. However, some other services are treated as the provision of a favour, therefore they seem to fall low on the day to day agenda/priority list of the staff intended to provide this support. This can lead to substantive delays in some areas. • The Steering Group members role requires them to be proactive in communicating relevant issues with the Partnership staff (such as the timings of parking reviews, events programmes, PSPO consultations etc) so that the team can make the best use of their limited resources and feed into these issues in a timely manner. In many cases, the Steering Group member is the main point of contact between that organisation and the Partnership, they need to fully take on the responsibilities of this position by bringing to the Partnerships attention relevant issues, and feeding back to their organisation anything that may impact upon them. • In terms of providing a strategic mechanism to allow local housebuilding to proceed, since the scheme began, 22,478 dwellings have used the scheme as part of their efforts to achieve planning permission. 18,381 under the Interim Strategy and 4,097 under the full Strategy.
Is it still fit for purpose?	As part of this review process, Natural England have been asked to comment directly on this matter. They have confirmed that if the conclusions of the financial

	<p>review are adopted, it will continue to provide appropriate mitigation. Their response is here in full: <i>'Natural England is an active member of the Solent Recreation Mitigation Partnership and Bird Aware Solent. We welcome this financial review that ensures necessary funding continues to be available to deliver adequate mitigation for the lifetime of the development.</i></p> <p><i>Provided that the conclusions of the financial review are adopted, it is Natural England's view that the Solent Recreation Mitigation Strategy will continue to provide appropriate mitigation for the effects of recreational impacts on the designated sites as a result of new development.</i></p> <p><i>We welcome working with the partnership on further reviews of the strategic solution in due course.'</i></p> <p>In terms of providing a strategic mechanism to allow local housebuilding to proceed, since the scheme began, 22,478 dwellings have used the scheme as part of their efforts to achieve planning permission. 18,381 under the Interim Strategy and 4,097 under the full Strategy. In terms of protecting the birds, the team work hard to follow best practice and trial a variety of engagement techniques. Currently the results of the initial 5 years of monitoring are awaited with interest.</p>
<p>Are staff adequately skilled and supported?</p>	<p>There is a full induction programme (for permanent and seasonal staff) and a budget for ongoing training needs of staff.</p> <p>Any role advertised by the Partnership typically sees a high rate of applications, therefore the Partnership is in the fortunate position of being able to choose from highly skilled and experienced staff.</p> <p>In 2019, the structure of the Ranger team was changed to better reflect the needs of the Partnership and also to allow more career progression (and hopefully therefore retention) of staff. The old structure had a Lead Ranger supported by full time Rangers and Seasonal staff. This new structure (depicted below) created Senior Ranger posts with defined specialisms related to sites and outreach.</p>

	 <pre> graph TD LR[Lead Ranger] --- SS[Site Specialist] LR --- ES[Engagement Specialist] SS --- R[Ranger] ES --- R R --- AR[Assistant Ranger] R --- SR[Seasonal Rangers - in post September to April] </pre>
<p>Are controls in place and do they work?</p>	<p>The Partnership is following the agreed monitoring programme for the initial 5 years (though owing to COVID-19 related issues, the data from Winter 2020/21 is anticipated to be anomalous and therefore won't be included in the final analysis). This will be extensively reviewed after that period, based upon the findings at that time.</p>
<p>How are issues addressed?</p>	<p>Identified issues can be resolved in the following ways depending on their scale:</p> <ul style="list-style-type: none"> • Resolved by Partnership staff (example - responding to the need to reprioritise site visits as a result of weather disruptions from incidences such as snow or high winds making working conditions unsafe) • Resolved with input from an appropriate Task and Finish Group (example - overseeing the tendering process for the monitoring work and dealing with any issues that arise from this work) • Resolved with input from the Steering Group (example - discussions to reach a consensus on how an LPA might treat a planning application for a more unusual activity which would need the case-by-case approach advocated within the Strategy) • Resolved with input from the Project Board (example - resourcing issues) • Resolved with input from PfSH who provide governance to the Partnership. (example - finance issues)
<p>Do results compare with the original project plan, in terms of</p>	<p>The Partnership is fortunate to have a financial reserve (owing to some housebuilding coming forward earlier</p>

quality, schedule and budget?	<p>than predicted) therefore it has more financial stability than some other similar schemes.</p> <p>The standard of work achieved by the Partnership has also been recognised by local and national awards for best practice.</p>
SATISFACTION OF STAKEHOLDERS	
Are end users' needs met?	<p>The LPAs have an effective mechanism which developers within their area are able to use to meet their requirements under the Habitat Regulations.</p> <p>The conservation bodies have the opportunity to influence and shape this strategic mitigation programme. Developers have a high level of certainty that by choosing to make a contribution, they can meet the requirements of the Habitat Regulations. They have a set pricing structure from day one which aids their project cost planning.</p>
Is governance satisfied?	<p>PfSH have shown a high level of support for the work of the Partnership. Regular KPIs are provided and annual site visits are offered so that Members can see the work of the Partnership in action.</p>
PROJECT COSTS AND BENEFITS	
What are the costs?	<p>The latest annual accounts can be found here: Bird Aware Annual Report 2019 2020.pdf</p>
What is the income stream?	<p>The project is entirely reliant on income from developer contributions. Owing to the local housebuilding market having previously been buoyant, the Partnership has managed to build up a financial reserve which allows it to plan activities with a relatively secure financing plan. However the local issues related to nitrate neutrality and the possible impacts of a predicted recession following the impact of COVID-19 could see this income stream threatened.</p>
AREAS FOR FURTHER DEVELOPMENT	
Have all the benefits been achieved? If not, what is needed to achieve them?	<p>Delivery of the Strategy is based around six key work streams:</p> <ol style="list-style-type: none"> 1. Rangers - Although the Strategy has been in place since 1st April 2018, the Ranger team only reached its full staffing level on 1st August 2019. This team have already been achieving

	<p>impressive site visit, engagement and event numbers, but it remains a relatively small team (5 ft and 2 seasonal) to cover 254km of coast.</p> <ol style="list-style-type: none"> 2. Communications programme - Work on this has been accelerated since the Brand and Communications Lead joined the Partnership in July 2018 and a Marketing Strategy was endorsed by the Partnership in January 2019, giving a timeline and focus to different initiatives. This work stream has a relatively small budget for the area it has to cover and relies heavily on input from the whole team. 3. Dog Walking Initiatives - This area of work has yet to really take-off as the Partnership has not yet been able to advertise the Dog Initiatives Lead post. It is hoped that this role will join the core staff within the next 6 months. That said, the Ranger team have been making some headway with this by exhibiting at dog focused events and conducting their own professional learning into how best to work with dog owners/walkers. Key messages that need to be conveyed to the dog walking community have also been independently tested by the Behaviour Insights Team (as part of a pilot project with Natural England) and these have been developed to be palatable and understandable to that community. 4. Codes of Conduct - The Partnership has already developed a Coastal Code of Conduct aimed at walkers (with and without a dog) and this has been heavily promoted since 2016. Work on further developing these for other coastal user groups (such as paddle sports and bait diggers) is due to commence in 2020/21 as prior to having the full Ranger team in place it was not possible to cover all work streams. The majority of this work will take place over the summer months when Rangers do not need to spend so much time undertaking site visits. Initial work to identify which groups to prioritise this work with is underway. 5. Suitable Alternative Natural Greenspaces (SANGs) - Funding to support the development of 5 sites was awarded by the Solent LEP through the Growth Deal programme. To date 3 of the 5
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	<p>have been completed and various delays (outside of the control of Bird Aware Project staff) have hampered the delivery of the other 2 sites. Until there is a larger suite of these, the existing ones are reluctant to be heavily promoted as they have raised concerns about not being able to handle large numbers of visitors. It should also be noted that as yet there is not a SANG on the Isle of Wight, though work continues to try and identify a suitable location. Therefore this area of work remains a priority to move forward with.</p> <p>6. Site Specific Projects - The Strategy always intended that the first financial award be paid out to support projects in 20/21 and the Partnership is on target to do this, with 2 more years' worth of projects identified to follow through. Furthermore a monitoring programme has been established to keep a check on their delivery and effectiveness. Results of this monitoring work will provide vital intelligence when the next round of potential projects are scored. It will help inform decisions about how effective different types of interventions are in delivering mitigation.</p>
Further training and coaching opportunities?	<p>Staff are empowered to request training opportunities in addition to the full programme of training they undertake as part of their induction.</p> <p>The Partnership has also been instrumental in establishing the Annual Mitigation Meet-up which allows for peer learning amongst other similar mitigation schemes.</p> <p>It is envisaged that the Dog Initiatives Lead post will also facilitate internal learning sessions.</p>
Would changes deliver more value?	<p>Partnership staff represent a relatively small team to cover such a large area (254km of coastline). Increasing the team size (particularly more Rangers) would see large benefits for a relatively modest outlay. This matter will be fully assessed once the first five years' of monitoring data is available.</p> <p>Bringing forward the initial 5 SANGs and working to support further suitable sites through the site specific project initiative would see real alternatives being offered to coastal users.</p> <p>The current form of Access Management Assessments do not appear to achieve lasting results. Plans are</p>

	<p>already underway to review how resources currently allocated to this work can be better utilised.</p> <p>The Site Specific Projects element of work has the potential to provide key mitigation measures at sites. Currently we hold a list of the first 3 years worth of projects we are intending to fund, together with an approved reserves list. Under this format, we potentially miss the opportunity to be the most proactive in terms of assessing potential projects, so an alternative approach involving a more 'live' list of projects (put together annually by the Steering Group, assessed/scored by the sub-group, then agreed by the Project Board prior to final endorsement by PfSH) is now being considered.</p> <p>Discussions on the pros and cons of developing such a list will be had with the Steering Group shortly in order to gauge if there is an appetite for them to assist in developing and maintaining such a list.</p>
Other additional benefits that could be achieved	<p>There are other large work streams being undertaken that (if properly co-ordinated) have the potential to come together with this project and achieve results that support all four aims and provide greater impact by dovetailing than working in silo. These are the work on nutrient neutrality, work on biodiversity net-gain, the implementation of the Solent Waders and Brent Goose Strategy and the strategic work around the recreational use of the New Forest. The Partnership is open to working with these groups and exploring where additional gains may be made through avoiding working in silo.</p>
LESSONS LEARNT	
How well are deliverables assessed?	<p>The Rangers undertake a lot of data collection whilst conducting site visits and events. An overview of this is shared with the steering group on a regular basis, which provides an opportunity for partners to discuss and feedback on this data.</p> <p>There is also a full monitoring programme that supports the Strategy and is being adhered to.</p>
What's gone wrong - how can a repeat be avoided?	<p>Disturbance monitoring – survey locations chosen too hastily. Monitoring is complex and time consuming. Rangers having to remain in poorly chosen survey locations (chosen prior to the Partnership operating), which prevents them from doing more useful engagement. Either change monitoring to be more like Birdwise (comprehensive monitoring undertaken only</p>

once every 5 years, also the disturbance monitoring focuses on recording levels of disturbance, not if these change with/without a Ranger present) or chose new survey locations. Also, although the monitoring is subject to an independent tendering process, it's proving to be much more costly than the original financial model budgeted for.

Additional issues related to monitoring have included such matters as the consultants dictating the work patterns of the Rangers so that the Rangers are in attendance at sites at the consultants convenience. This has now been stopped by the Rangers keeping a rolling forward plan of their site visits allowing the consultants to fit in around them, not the other way round. Despite this, rangers cannot change their working location in response to weather conditions and local events which they might usually do to better respond to disturbance issues.

Also, there have been incidences where it has become apparent that the consultants have not fully engaged with issues related to disturbance, therefore the quality of their final report can be limited. This is now avoided by using a tendering process which places more emphasis on 'value' rather than 'price'.

Access Management Assessments - whilst the theory of these is relatively robust, in practice they are proving to be cumbersome and in some cases controversial. Also the reports make a series of recommendations for potential site improvements. As it's not always possible to implement these due to funding, site ownership issues, site management issues, then the Partnership runs the risk of looking ineffectual as a result. An alternative way forward to cover this area of work has already been proposed to the Project Board and will be considered at a later date. This centres around using the Site Specialist Ranger to work proactively with site managers at times that suit them to actually implement changes on site.

Site Specific Projects - these are in their initial stages of delivery, and so far are progressing well. However there is already concern about how best to keep the project list 'live' and evolving such that at each point of financial award the Partnership is able to be confident it is supporting the best opportunities and projects.

	<p>Reactive not proactive - partnership staff represent a relatively small team to cover such a large area and so many work streams. There are around 13 million visits made to the Solent coast each winter, this is an enormous amount of visits for the team to be trying to influence into undertaking Bird Aware practices. Rangers are spread thinly to cover so much ground geographically and maintain successful working relationships with all stakeholders across the region, which can result in a tendency to work with those that approach the Partnership and who are easy/ keen to get involved rather than being able to target the locations/ organisations that Partnership staff feel would most benefit the aims of the project. There are many simultaneous projects and work streams running alongside each other; it is unrealistic with current staffing levels to carry them all out to a high standard, to maintain cohesion and stay focused on priorities. This can only really be rectified through more staff or a reduced level of projects, through prioritisation. Another measure that would assist in this respect would be greater Partner input (ideally through members of the Steering Group) feeding in relevant information to the Partnership in a timely way and helping maintain an overview of strategic priorities within the Partnership area.</p> <p>Partner Involvement Partnership staff would like to see a much more consistent level of involvement from all Partners, particularly at Steering Group level as there is a tendency for some Partners to be more proactive and engaged with the work of the Partnership than others. This causes a potential imbalance in what can be achieved in different areas and concern is raised that this will only increase over time if corrective action is not taken soon.</p>
<p>What's gone well - lessons learnt</p>	<p>Rangers seizing opportunities to work with stakeholders –examples include: Hook Links – rangers worked with the site manager to protect a high tide roost that was previously being frequently disturbed. There was initial resistance to this project as there was concern it would be negatively received by local residents. Rangers were able to overcome this and worked with them to agree wording,</p>

	<p>put up signage, a leaflet box and pawprint waymaker disc. Feedback from the public has been positive and anecdotal evidence shows that disturbance has reduced. Lepe Country Park – by building an excellent working relationship with the staff there is now a whole Bird Aware section on their interactive screen, it has a range of our posters and our new video on it.</p> <p>UKSA – rangers worked closely with Natural England on the IOW to build links with them and tackle their disturbance impact at Thorness Bay. Training was planned with the watersport instructors at UKSA (due to COVID-19 this is yet to go ahead).</p> <p>Sharing of best practice with other mitigation schemes /the positive style engagement that we have adopted – being instrumental in the establishing of mitigation meet ups, research and planning when rangers first recruited.</p> <p>Comprehensive seasonal induction - the full induction programme in September enables a close team with strong working relationship and allows the seasonal rangers to prepare for the season ahead. Increasing the period for which seasonals are recruited to include September was a crucial move.</p> <p>Monthly team meetings - all Partnership staff spend one day a month together. Half the day is spent both visiting and discussing issues pertaining to a key site, or meeting with a stakeholder. The other half of the day is a formal meeting where updates and project ideas are shared and developed. As staff are hosted by three organisations, this is an important opportunity for the group to meet as a whole and grow a sense of being part of a united 'team'. This sense of team is further enhanced by the use of chat groups on messaging apps and staff being encouraged to share both work and non-work related issues on these.</p> <p>Electronic communications - as Partnership staff are hosted by 3 organisations, it is not possible for any one member of the team to see the electronic calendar of all their colleagues. Equally sharing documents and jointly working from the same resources can be cumbersome. Therefore Partnership staff make use of various resources such as a check-in/out message group on Whatsapp (so colleagues know daily movements), Zoom</p>
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	<p>or Microsoft Teams for virtual meetings and SharePoint for collaborative working on documents.</p> <p>Adopting a positive approach - Partnership staff have to convey key messages to a wide variety of coastal users. The approach taken is always positive and non-critical, even if the member of staff has just witnessed the user be responsible for a disturbance incidence. This approach is proving to be well received by 95.9% of coastal visitors and allows Partnership staff to have constructive engagements with those they meet.</p>
FINDINGS AND RECOMMENDATIONS	
What was left out of the review	<p>Owing to the overriding need to complete the first 5 years' of monitoring work as part of the initial assessment of the effectiveness of the Strategy, there have been some areas of the strategy that it has not been appropriate to include at this moment in time. These include:</p> <ul style="list-style-type: none"> • Making recommendations to strategically overhaul the monitoring work programme for this period (as comparable data will be most useful in establishing trends) • The overall type and scale of mitigation being provided • Determining if it is necessary to bring in 'stricter' measures such as restricted access to some part of the coast.
What has been learnt from this review?	<p>The Partnership is in a strong position, with a growing base of operational experience, strong links with Partners and stakeholders and a positive reputation amongst coastal users. The Partnership is also well regarded by other mitigation partnerships and has received national awards for the work it does.</p> <p>At the same time, as the operational experience of the Partnership grows, it becomes clear that some of the theoretical planning on how the Partnership may best be run are not proving to be ideal in practice.</p>
What corrective action is needed to obtain required results?	<p>The Partnership needs to address the following issues:</p> <ul style="list-style-type: none"> • All Partners need to be kept in close dialogue with the Partnership team. • The initial monitoring programme needs to be completed, then a major overhaul undertaken to

	<p>make it fit better with operational delivery of the Strategy.</p> <ul style="list-style-type: none"> • Site specific projects should consider ways to be more flexibility to ensure that the best opportunities and projects are supported at each stage and that the project list doesn't become outdated. • Access Management Assessments need review to make sure that they actually produce something that is utilised and beneficial to the Partnership and landowners/managers. • The financial model underpinning the Strategy needs to ensure it is robust enough to support the delivery of mitigation measures throughout the entire duration of the in-perpetuity period. • The Partnership staff are stretched thinly to be trying to make sure the 13 million winter visits to the Solent coast are conducted in a Bird Aware way. More staff would assist in meeting this challenge.
<p>What lessons are being carried forward?</p>	<ul style="list-style-type: none"> • The Partnership will continue to use its growing operational experience to inform future planning and decision making. • Opportunities to jointly work with other strategic projects and key stakeholders will continue to be sought to maximise the impact of the delivery of the Strategy.
<p>Does it naturally lead to future projects which will build on the success and benefits already achieved?</p>	<p>There are four large work streams being undertaken that (if properly co-ordinated) have the potential to come together with this project and achieve results that support all four aims and provide greater impact by dovetailing than working in silo. These are the work on nutrient neutrality, biodiversity net-gain, the implementation of the Solent Waders and Brent Goose Strategy and the strategic work around the recreational use of the New Forest.</p> <p>Additionally, the Bird Aware brand has the option to be used by other similar mitigation Partnerships and it is believed that it will create a greater and wider reaching impact if it gets taken up nationally. Bird Aware Essex Coast have already adopted the brand and negotiations continue with several other Partnerships to try and bring them on board too.</p>

	<p>As a separate issue, the England Coast Path is due to fully open soon, with 2021 being termed as the 'Year of the Coast' as part of the promotional activities around this. Whilst in the Solent, much of the route is already accessible, the promotion of the path is predicted to bring greater numbers of coastal users. The Partnership have been working with Natural England (who are leading on the England Coast Path work) to ensure appropriate representation on coastal signage to inform people of the need to be Bird Aware, and to inform discussions on the actual route to be promoted so that less sensitive routes have been considered. Joint working on issues such as this is of great benefit to the aims of both projects and the Partnership remain open to ceasing more such opportunities in future.</p>
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Review of other Mitigation Strategies

A desk based review of a sample of other Partnership strategies and business plans was undertaken. Those selected were already known to the team and are considered some of the forefront of those operating within the sector. They were also identified as dealing with similar issues to those at the core of our work (protecting coastal birds from increasing recreational disturbance) and therefore offer a more comparable benchmark.

Additionally we've built up a good working relationship with many of the Partnerships and been fortunate enough to be able to have honest discussions with them about the strengths and limitations of their own strategies.

Below are some features that will be considered for inclusion in future work and reviews of the Strategy, once the results of the initial 5 years' worth of monitoring reports is available to also help shape this process.

Source	Comment
SUFFOLK HRA - RAMS, MAY 2019	<p>This strategy is written in quite an academic tone. It includes a Mitigation Hierarchy (avoid, mitigate, compensate, enhance) which is a useful tool to consider and largely aligns with the approach we are taking. Similar to ours, this strategy also provides a suite of measures to address mitigation, recognising that any one measure may not be effective for all audiences if used in isolation.</p> <p>Find the document in full here: Suffolk HRA RAMS May 2019</p>
SOUTH EAST DEVON EUROPEAN SITE MITIGATION STRATEGY JUNE 2014	<p>This Strategy is again very academic and at 249 pages, it's also the longest of those we came across. It recognises the principles of the National Planning Policy Framework guidance for mitigation then further develops them to encompass a wider scope, concluding that that they should be (paraphrased):</p> <ul style="list-style-type: none"> • NECESSARY - In order to enable planning permission to be granted • RELEVANT TO PLANNING - Can't be measures required irrespective of new development, such as maintenance and restoration • RELEVANT TO THE DEVELOPMENT - Only applied to developments of a kind, scale and location that have the potential to affect the site.

	<ul style="list-style-type: none"> • EFFECTIVE - Provide certainty that the development can proceed without adverse effects on the European sites arising from recreation. • COST EFFICIENT: Cost effective collection, management, fund holding, distributing and accounting. Measures should be equal to what is required to happen, but not over and above what is necessary for the protection of the site. They must be fairly and reasonably related in scale to the development. • FLEXIBLE - Robust enough to give protection, flexible enough to be reviewed and modified over time (as and where indicated by monitoring) • FAIR - Should be proportionate to the potential impact generated. • EVIDENCE BASED - Justifying the need and appropriateness and likely effectiveness of measures. • TIMELY AND IMPLEMENTABLE: Implementable and deliverable, including in-perpetuity element. • COMPLIANT - with law and policy <p>It is considered that our Strategy adheres to these principles.</p> <p>Find the document in full here: South East Devon Mitigation Strategy June 2014</p>
<p>BIRD WISE NORTH KENT MITIGATION STRATEGY JAN 18</p>	<p>The structure of the Project Board for this group differs from most as Natural England are only included in an advisory role (i.e. with no voting rights) and it does include membership from the Kent Developers Board which directly represents developers. This Strategy also includes a definition of what 'success' is deemed to be: <i>The Strategy will be deemed successful if the level of bird disturbance is not increased despite an increase in population and the number of recreational visitors to the coastal sites around the North Kent Marshes.</i> Locally we refer to the key statement of '<i>creating a coastline where people's recreation does not impact overwintering birds</i>' which conveys a similar focus on making people still feel welcome at the coast without impinging on the birds ability to rest and feed as they wish.</p> <p>Find the document in full here: Bird Wise North Kent Mitigation Strategy Jan 2018</p>
<p>BIRD WISE NORTH KENT</p>	<p>This is a very readable document. It sets out clear objectives and milestones.</p>

BUSINESS
PLAN 2017/22

The monitoring regime vastly differs from most others in that for the majority of years little to no monitoring is undertaken, with a full suite of monitoring assessments undertaken every 5 years.

Find the document in full here:

[Bird Wise North Kent Business Plan 2017-22](#)