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| Habitat Management and Monitoring Plan | |
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| Site Name: |  |
| Date: | Click or tap to enter a date. |
| Version: |  |

Author:



Client:



#### Template Document User Guide

**Please delete this guidance page upon completion**.

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| Template User Guide |
| You can use the Habitat Management and Monitoring Plan Template (HMMPT) for on-site or off-site biodiversity net gain projects. It is suitable for sites of varying sizes and complexity, from small and simple to large and complex. It provides a series of tables, figures and textboxes. Complete these to demonstrate how habitat creation, enhancement and management will be undertaken. Not every box will be relevant to every project. Omit those considered not relevant to your project, applying professional judgement.  **Companion Document**  The Companion Document contains templates for each broad habitat type used in the statutory biodiversity metric. It also assists authors in completing the ‘Environmental Information’, ‘Creation, Enhancement and Management’ and ‘Monitoring’ sections. To tailor the plan for your site, insert the relevant standardised forms from the Companion Document into your main HMMPT.  **Site Baseline and Environmental Information**  Considering the site's characteristics, choose the relevant baseline site conditions and background environmental information to include in your management plan. This is essential in informing the design of your project and shows the reviewer you have considered these in the proposals for the site. These include the proposed habitat creation and enhancement. Also, what is appropriate to include or exclude, or to point the reviewer to relevant information that has provided elsewhere as part of the application. Use the ‘Baseline and Environmental Checklist PB-T01’ to record relevant references, or reasons if not included.  **HMMP Checklist** (separate document)  This checklist is a summary of the HMMP Template headings. Author and reviewer can scan the list to check which HMMP details to include, or that have been included, in the submitted plan. You can also list and link to relevant supporting documents to accompany the templated details if required. This helps avoid duplication of information. The reviewer can then easily check which information to expect to see in the HMMPT and which to review in an alternative linked document. |
| **Formatting** |
| The HMMPT format is intended as a guide. The Template uses standard Microsoft Word formatting that has not be locked for editing. You can therefore adjust it to tailor your HMMP as required for the specific site and according to your preferences. For example, you can change text box sizes to reduce blank space in the template.  There are opportunities to provide and reference additional photographs and plans as separate appendices if required. Provide the reference number of the appropriate appendix, or location if included in a separate report, using the appropriate box within the template.  **Text in grey is provided as a prompt. Replace grey text with your own words. Remember to change to** black text **then delete any remaining grey ‘prompt’ text.**  **You can delete blue text as this is for guidance purposes only.**  **Each text box in this HMMPT has a unique ID to assist reviewers. Do not change the reference code of any Boxes or Tables.** |
| **Supporting documents** |
| * [HMMPT Companion Document](https://publications.naturalengland.org.uk/publication/5813530037846016) * [Statutory Biodiversity Metric tools and guides](https://www.gov.uk/government/publications/statutory-biodiversity-metric-tools-and-guides) * [Biodiversity Net Gain Guidance](https://www.gov.uk/government/collections/biodiversity-net-gain) |
| **Using the Companion Document** |
| The Companion Document includes additional boxes and tables that must be manually copied into this template using the copy-and-paste function. To streamline the copying and pasting process, you can minimise the heading by selecting the arrow on the left. Once the arrow is selected, when you copy, you will also copy any accompanying boxes or tables.  It is the author's responsibility to decide what additional information is appropriate to include. |

Template published by Natural England.

We acknowledge the significant input from the HMMPT user-testers and production on Natural England’s behalf by FPCR Environment and Design.

#### Contents

[1. Project Background 3](#_Toc148627498)

[Summary of Management Plan 3](#_Toc148627499)

[Site Boundary Plan PB-F01 4](#_Toc148627500)

[Site Context Plan PB-F02 5](#_Toc148627501)

[Phasing strategy 6](#_Toc148627502)

[Roles and Responsibilities 6](#_Toc148627503)

[Land Use Summary 7](#_Toc148627504)

[Site Context Photos PB-F03 7](#_Toc148627505)

[Site Baseline, Environmental Information and Associated Impacts Checklist PB-T01 8](#_Toc148627506)

[Baseline and Environmental Information 9](#_Toc148627507)

[2. Planned Management Activities 10](#_Toc148627508)

[Principles Informed by Design Stage 10](#_Toc148627509)

[Habitat and Condition Targets PM-T01 11](#_Toc148627510)

[Habitat Retention 12](#_Toc148627511)

[Habitat Retention Plan PM-F01 12](#_Toc148627512)

[Creation, Enhancement and Management Targets and Prescriptions 13](#_Toc148627513)

[Habitat Creation and Management – Risk Register and Remedial Measures PM-T02 14](#_Toc148627514)

[3. Monitoring Schedule 15](#_Toc148627515)

[Monitoring Strategy 15](#_Toc148627516)

[Monitoring Methods and Intervals MS-T01 15](#_Toc148627517)

[Monitoring Reports 16](#_Toc148627518)

[Adaptive Management 16](#_Toc148627519)

**Version Control**

The version control is used for updates to the content. Record the initial version and further version control details in this table each time the management plan is altered throughout the management and monitoring period.

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| --- | --- | --- | --- |
| Version | Issue Status | Prepared by / Date | Approved by / Date |
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**Document Details**

Provide ownership, copyright and licensing information within this table.

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| Authorship Details |
| Use this box to provide relevant details of document ownership by the author, such as company address, copyright or map licence information. |

# Project Background

Summarise the key aspects of your management plan in this section. Table PB-B01 can be extended to suit the specific needs of individual projects.

|  |  |
| --- | --- |
| **Site Overview** **PB-B01** |  |
| **Project type** | On-site / off-site / mixed on-site and off-site / Habitat Bank/ Statutory Credits Project / other |
| **Development Name and Address** | N/A if habitat-bank or if not yet associated with a development |
| **BNG Project Name and Address** | If different from the development |
| **Author Organisation** | Who has written the HMMP |
| **Landowner** | Legally, the site owner |
| **Land Manager** | Person who is currently responsible for managing the site. N/A if not applicable |
| **Responsible person/organisation for creating or enhancing the habitat** | Name of organisation |
| **Period covered by this management plan** | Start/end point of 30+ year period and 5-year update (including phasing if applicable) |
| **Planning authority** | Planning authority area of the project in this plan |
| **Planning reference (if applicable)** | For any application relating to or permission granted for the BNG enhancement land |
| **BNG register reference (if applicable)** | Applicable for off-site only – N/A if using for on-site |
| **Central OS grid reference** | Central OS grid reference of the area under this HMMP |
| **Metric revision/title** | Reference Biodiversity metric used for this project (‘statutory biodiversity metric’ from January 2024) |
| **Are any Irreplaceable Habitats present onsite** | Yes:  No: |

## Summary of Management Plan

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| Habitats to be Retained, Created and Enhanced PB-B02 |
| Provide a high-level summary of the habitats to be retained, created and enhanced as part of this HMMP. |
| **Timescales for Actions** PB-B03 |
| Summarise the key timescales for the actions covered by this HMMP. |
| **Monitoring Requirements** PB-B04 |
| Summarise the monitoring requirements set out within this HMMP. |
| **Required Consents and Licences** PB-B05 |
| List the relevant consents and licences required as part of this HMMP. |
| **Funding** PB-B06 |
| Provide an overview of how funding has been secured to deliver the HMMP. |
| **Legal Agreement** PB-B07 |
| Provide an overview of any legal agreements that secure the delivery of the HMMP. |

### Site Boundary Plan PB-F01



### Site Context Plan PB-F02

This plan should show the location of the site, including the LPA, boundary, national character area, and any relevant landscape scale policy or guidance information.



### Phasing strategy

|  |  |
| --- | --- |
| Will the proposed work measures be delivered in phases? PB-B08 | Yes:  No: |
| Provide details of how the project and any habitat creation and enhancement works and their management will be phased.  Include details of how this will be tracked and monitored to achieve the BNG targets on the ground.  State if this management plan covers a single phase or if it is a site wide management plan.  If being provided for a single phase, provide a reference to a document that provides information on the overarching management plan for all phases. | |

### Roles and Responsibilities

Provide details of the responsible persons and organisation(s) for delivering this management plan.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Ecologist or Other Professional Responsible for HMMP PB-B09 | | | | |
| Name or Initials | |  | | |
| Organisation | |  | | |
| Responsibility | Start Date: |  | End Date: |  |
| Summarise the relevant responsibilities of the Ecologist or other professional responsible for the HMMP, both in terms of the production and implementation of this HMMP | | | | |
| Statement of Competency | | | | |
| A competent person is someone who can demonstrate they have acquired through training, qualifications or experience, or a combination of these, the knowledge and skills enabling that person to perform specified tasks. | | | | |

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| Landowner or Land Manager PB-B10 | | | | |
| Name or Initials | |  | | |
| Organisation | |  | | |
| Responsibility | Start Date: |  | End Date: |  |
| Summarise the relevant responsibilities of the landowner (or land manager if appropriate) in the production and, or, implementation of this HMMP | | | | |
| Statement of Competency | | | | |
| Demonstrate management and monitoring competency and, or, relevant site knowledge and skills through relevant training, qualifications or experience, or a combination of these. | | | | |
| Management Organisation(s) Responsible for Implementing the HMMP PB-B11 | | | | |
| Name or Initials | | Add N/A if works being completed by the landowner or land manager | | |
| Organisation | |  | | |
| Responsibility | Start Date: |  | End Date: |  |
| Summarise the relevant responsibilities of the Management Organisation(s) in the production and, or, implementation of this HMMP. | | | | |
| Statement of Competency | | | | |
| Demonstrate the knowledge, skills and, or, experience to manage the habitats to achieve the BNG requirements, through relevant training, qualifications, experience, or combination of these. | | | | |
| LPA or Responsible Body for Reviewing HMMP PB-B12 | | | | |
| Name or Initials | |  | | |
| Organisation | |  | | |
| Responsibility | Start Date: |  | End Date: |  |
| Summarise the agreed relevant responsibilities of the LPA or Responsible Body in the review, auditing and, or, long-term involvement in the implementation of this HMMP (if applicable) | | | | |

### Land Use Summary

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| Overview of Baseline Site Use PB-B13 |
| Provide a concise overview of the current site use including a summary of the habitats present, any specific management operations currently in effect and any other land uses.  Provide the context for the management activities to assist the reviewer in understanding the changes proposed. |
| **Overview of Proposed Site Use** PB-B14 |
| Summarise the site's anticipated uses, including proposed habitats, management regimes and intended land uses. |

### 

### Site Context Photos PB-F03

Please include two overview photographs of the site in its current form here. Include additional photographs in an appendix if needed. Tick if additional photographs are provided in the Appendices  Reference: Click or tap here to enter text.





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## Site Baseline, Environmental Information and Associated Impacts Checklist PB-T01

Consider the Baseline and Environmental Information listed below. These are likely to be appropriate factors informing your proposals and project design. They can provide the reviewer with important contextual information for the management prescriptions provided later in this document. Use your professional judgement to determine which factors are relevant to your specific project.

Please use the check box to indicate which are included in your plan. For any not included, provide brief reasons why the factor is not relevant to your project using your professional judgement. Where this information is provided elsewhere, you can reference existing reports and, or, plans that have informed your decisions. For the templates for each heading see pages 3-20 of the Companion Document.

|  |  |  |  |
| --- | --- | --- | --- |
| Baseline and Environmental Information | Prompts for when these may be relevant.  This is not an exhaustive list. Use your professional judgement to determine which are required for your HMMP | Check box if included | Document Reference or Reason if not included |
| **Statutory / Non-statutory Designated Sites** | Will your proposals lead to direct or indirect effects on designated sites? |  |  |
| **Protected and Notable Species** | Does the presence or proximity of specific species on or near your site present any constraints or opportunities to project design or management? |  |  |
| **Invasive Non-Native Species (INNS)** | Are any INNS present onsite that could affect the proposals? |  |  |
| **Biological Records Plan - Sites and Species** | Does the presence of designated sites or specific species on or near the site present any constraints or opportunities to proposals? |  |  |
| **Baseline Habitats Survey** | Is this current and important HMMP information located in a separate document? If so, provide details on where it is located. |  |  |
| **Public Access** | Has public access, or proposals to allow public access, influenced your management prescriptions? If so, how? |  |  |
| **Climate** | Are local climate conditions and, or, climate change likely to impact the target habitat retention, creation or enhancement? |  |  |
| **Geology and Topography** | Any geological or topographical constraints or opportunities? |  |  |
| **Agricultural Land Status** | Does the site support any land favourable for agricultural management? Could this affect the proposals? |  |  |
| **Soils and Substrates** | Do soils and substrates present any constraints or opportunities? |  |  |
| **Contaminated Land** | If there is any contaminated land, will this present any constraints? |  |  |
| **Hydrology and Drainage** | Will the site hydrology present any constraints or opportunities? |  |  |
| **Flood Risk Zones** | Is the site within a flood risk zone? Will that present any site management risks? |  |  |
| **Landscape Character and Designations** | Does the landscape character of the site present any constraints or opportunities? |  |  |
| **Historic Land Use** | Does the historic land use present any constraints or opportunities? |  |  |
| **Historic Environment and Earth Heritage** | Are there any historic environment designations? What are the implications for your plan? |  |  |
| **Other – please specify** | Any other details - for example underground services or overhead powerlines, which may impact habitat management. |  |  |

### Baseline and Environmental Information

See the Companion Document pages 3-20 for the baseline and environmental information insert forms.

The HMMPT Companion Document contains a template for each environmental information category. Use these templates to set out how you have considered relevant constraints and opportunities as part of the design process, to promote the success of this management plan. Copy in the relevant templates from the Companion Document for each environmental information category to be included. Optional: Include these sheets at the end of your plan or as an appendix, referencing the location in Table PB-T01 above.

# Planned Management Activities

Provide the site-wide aims and objectives. These should consider the Project Background information section outlined above as well as the outcomes of the Metric.

|  |
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| Management Plan Aims and Objectives PM-B01 |
| Set out your site-wide principles and the overarching aims and objectives that guide this HMMP. Present these clearly and concisely to assist the reviewer with understanding the overall aims and objectives. This will also provide context to the detailed information presented later in this document.  Summarise how each aim and objective will be achieved within the appropriate timescale and maintained for at least 30 years.  Where relevant, provide details on the project's long-term vision, including the beyond the 30 years. This may be a vision statement or similar.  **Provide an overview only in this box. The purpose is to explain the overarching aims of the management plan to the reviewer. Spaces are provided later in the template to provide more specific management targets prescriptions.** |

### Principles Informed by Design Stage

The project's BNG target(s) should be set and documented early in the design process. Outline how background and baseline information influenced key design principles for the project from an early stage. This can provide useful context for the proposed retention, creation and enhancement measures.

|  |
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| Design Principles Informed by Baseline Information PM-B02 |
| Summarise how the site features and baseline information influenced the site’s habitat retention, creation and enhancement aspirations during the early stages of the project design.  Where relevant, include details on how you reached a decision on the strategic significance of the habitat parcels present on site. |

### Habitat and Condition Targets PM-T01

This table presents a summary record of what you have agreed to deliver based on the biodiversity metric. These habitat condition targets form the basis of what the management plan is setting out to achieve. Include the relevant ‘Area’, ‘Hedgerow’, and ‘Watercourse’ types to be implemented and managed throughout the period of 30 years or more.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Baseline Habitat Type | Target Habitat Type | Parcel / Feature Refs | Baseline Condition | Targeted Condition | Years to Targeted Condition | Condition Assessment Targets | Comments |
| Example: Cereal crops | Other neutral grassland | 1,2,3,5,8,9,10 | N/A | Moderate | Standard time to target condition from the statutory biodiversity metric. | Provide the passes and fails of the metric condition assessment criteria that will be targeted for the proposed habitat target condition score.  For example:  Moderate condition will be targeted by achieving a pass in criteria B, C, D and E. Criterion A will not be targeted~~.~~ |  |
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| Habitat and Condition Targets Further Comments |
| Use this section to provide further details relevant to achieving the habitat and condition targets set out above. Also, include any additional objectives that are relevant to the proposals but outside of the scope of the statutory biodiversity metric calculations. |

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## Habitat Retention

Provide a concise description of the habitats that are to be retained in their baseline condition. Habitats being retained may still require ongoing measures to maintain their baseline condition.

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| --- |
| Measures to be Implemented to Protect Retained Habitats PM-03 |
| Summarise the details of the habitats to be retained by the project. Use parcel references and clearly show these on the accompanying habitat retention plan.  Set out how protective measures will be implemented and maintained to protect all retained habitats throughout the project.  Set out any management measures that may be required to maintain or enhance their baseline condition. |
| **Specification of Protective Measures to be Used PM-04** |
| Use this section to provide detailed technical specifications of any protective measures (for example fencing) to be implemented. |

## Habitat Retention Plan PM-F01

Provide a plan with the locations of habitats to be retained (including whether to be protected and, or, enhanced) and those to be created under this HMMP. Include parcel references if needed. Tick box if any additional plans are provided in the Appendices  . Reference: Click or tap here to enter text.

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### Creation, Enhancement and Management Targets and Prescriptions

**Templates are available for Area Habitats, Hedgerows and Watercourses**

See the HMMPT companion document pages 21-125 for the habitat creation, enhancement and management targets and prescription templates. The Companion Document contains a template for each habitat condition criteria as provided in the statutory biodiversity metric tool and Condition Assessments.

Use these templates to set out the creation, enhancement and management targets and prescriptions for each habitat on your site.

1. **Plan(s) page**

Page 22 includes a blank template for including a plan showing the locations of the habitat creation, enhancement and management measures to be delivered by the HMMP. You can either present a single site-wide masterplan showing the locations of all habitats to be delivered and, or, you can provide individual plans for each of the habitats to be delivered, showing only the locations of the relevant habitats. Use your professional judgement to determine whether individual plans for each habitat are required.

1. **Tabulated Templates**

For each habitat type provided as part of your proposals, copy and paste the relevant templates from the Companion Document into this section of the HMMPT**.** Use your professional judgement on how to include these. You can

* + include a single table for each different habitat type to be delivered by stating which parcels each criterion is relevant to

and, or

* + use multiple versions of the same habitat template. This may be more useful if you are targeting different conditions in different parts of the site or if differing baseline conditions across your site may affect the management of certain parcels. You can provide a separate set of tables for each different condition requirement of the same habitat by re-copying the same blank template into the HMMPT.

Delete the blue text on this page before copying across sections from the Companion Document.

## Habitat Creation and Management – Risk Register and Remedial Measures PM-T02

Provide a site-wide risk register associated with creating, enhancing and, or, managing each habitat type. Consider your approach to delivering the BNG targets in case the management prescriptions do not deliver as expected.

This is a pre-emptive list. The list of potential risks should be as comprehensive as possible to provide confidence in the delivery of the management plan objectives. Complete each habitat's management targets and prescriptions first, then consider the likelihood of the risk occurring and what impacts it may have if it was to occur. Consider how these may feed back into monitoring requirements.

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| --- | --- | --- | --- | --- |
| Risk Identification Date | Habitat Type | Risk Factor | Trigger for Action | Remedial Measure |
| Example: 16-08-2023 | Woodland | Newly planted trees failing to establish | 10% of targeted number of newly planted trees found to be dead during years 1-10. | Plant a larger number of trees initially as contingency against some losses in the early years. Undertake a second round of planting, replacing failed specimens on a like-for-like basis |
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# Monitoring Schedule

To deliver BNG, a robust strategy is critical to monitor successes and challenges. Routine monitoring informs progress and facilitates the required management plan updates at set intervals.

### Monitoring Strategy

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| Provide details of the monitoring strategy to encourage successful implementation of the management plan (MS-B01) |
| Provide details of methods that will be used to compare the baseline habitat with the proposed retention, creation or enhancement measures. For example, this may include before-and-after photos, before-and-after surveys and species lists, etc. |

### Monitoring Methods and Intervals MS-T01

Provide details of the methods you will use to adequately monitor the progress towards the targets stated in the management plan and as agreed with the Local Planning Authority.

Monitoring methods and frequency need to be considered according to habitat type. The text below is only for illustrative purposes. Plan according to your own project and habitat requirements.

|  |  |  |
| --- | --- | --- |
| Habitat Type | Monitoring Methods | Monitoring Interval and Timing |
| Example: Other neutral grassland | To be undertaken on parcels 1, 3, 5 and 8.  Undertake quadrat sampling to identify the habitat type that is establishing and then number of species per m2.  Estimate percentage of bare ground, bramble and bracken cover.  Collect a botanical species list across grassland to check against target species list | Annually from years 1-5, then every 5 years.  Surveys to be completed between May and August |
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### Monitoring Reports

Following completion of habitat creation and initial enhancement works, prepare for your monitoring report for the Local Planning Authority or Responsible Body. You should monitor each habitat type comprising the BNG project. Provide sufficient detail for the reviewing authority to assess the progress. The ‘Monitoring Report Template’ can help you do this. The requirements and regularity with which the monitoring reports are required are at the discretion of the LPA or Responsible Body. Prepare the monitoring requirements below.

#### Monitoring Report Schedule MS-T02

Provide details of the person or organisation that will be responsible for submitting the monitoring reports. Also state the responsible organisation for receiving and reviewing the reports.

|  |  |
| --- | --- |
| Organisation Responsible for Submitting the Monitoring Reports | Organisation Receiving and Responsible for Reviewing Reports |
|  |  |

Provide details of when the monitoring surveys and reports will be undertaken and submitted. You can extend the table and adjust according to your required schedule.

|  |  |  |  |
| --- | --- | --- | --- |
| Project Year | Month Report to be Submitted | Month Management Plan to be reviewed | Comments |
| Y1 | September | September or October | Report on results of initial grassland and scrub creation measures. |
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### Adaptive Management

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| Summary of Adaptive Management Approaches (MS-B02) |
| Use this box to summarise how you plan to incorporate adaptive management. Consider the risks in section [PM-T02](#_Habitat_Creation_and) above. The aim is to have a feedback loop between monitoring, then reporting, and how any proposed changes are subsequently reflected in this plan.  Adaptive management is a systematic approach to natural resource management that involves monitoring and evaluating the effectiveness of management actions then adjusting as necessary to improve outcomes over time. It is an iterative process in which management actions are followed by targeted monitoring outcomes. These, in turn, inform the ongoing management.  Monitoring results inform necessary management changes to promote achieving BNG targets stated in the statutory biodiversity metric and HMMP. The monitoring can pick up any unexpected, external influences. Some examples are dealing with a new plant disease, an invasive species that is thriving due to climate change, or changes to site access due to site flooding.  Observations and notes from day-to-day management are important for delivering adaptive management. Consider how this information will be captured and fed into changes in management prescriptions, then through to subsequent monitoring reports.  Regular robust monitoring, and reporting to the responsible authority, should identify issues early on. Then you can make conscious decisions to implement effective actions. If the BNG objectives are affected by external factors, it is important to agree decisions on changes to the management prescriptions and targets with the responsible authority. Following the review, record any changes in this management plan and schedule. |