



Department
for Environment
Food & Rural Affairs

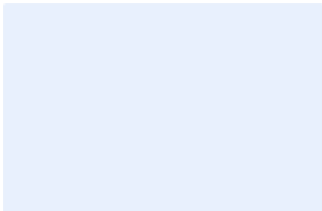
Habitat Management and Monitoring Plan

For use with
Small Sites Metric
(Statutory Biodiversity Metric)

Site Name:	Land at Poolside, Haverigg
Date:	19 th March 2026
Version:	1.1
Small Sites Criteria Met	The site fulfils the criteria for use of the Small Sites Metric (Statutory Biodiversity Metric) calculation tool. Yes ☒ No ☐ If 'No' use the Main HMMP Template for the full statutory biodiversity metric instead of this one.

Author: Tamsin Douglas
MCIEEM.

South Lakes Ecology



Client: Ethan King



Template Document User Guide

Context – The Small Sites Metric

The Small Sites Metric Habitat Management and Monitoring Plan Template (SSM HMMPT) is designed to complement The Small Sites Metric (Statutory Biodiversity Metric) (SSM) calculation tool. It follows the same criteria as the SSM.

The SSM calculation tool can only be applied to ‘small sites’ as defined in [The Small Sites Metric \(Statutory Biodiversity Metric\) User Guide](#).

This means:

- residential development where the number of dwellings is between 1 and 9 on a site of an area 1 hectare or less, or if the number of dwellings is unknown, the site area is less than 0.5 hectares, or
- commercial development where floor space created is less than 1,000 square metres or total site area is less than 1 hectare, or
- development that is not the winning and working of minerals or the use of land for mineral-working deposits, or
- development that is not waste development

It is not possible to use the SSM, and SSM HMMPT, on all sites defined as ‘small sites’. The following criteria also need to be met to use the SSM:

- where only the habitats available in the SSM are present on-site
- where no priority habitats are present on-site (except some hedgerows and arable field margins that are medium distinctiveness)
- where no statutory protected sites or habitats are present
- where no European protected species are present

Supporting documents

[SSM HMMPT Habitat Guide](#)

Tools and Guidance

- [GOV.UK Statutory biodiversity metric \(small sites\) tools and guides](#)
- [GOV.UK Government Collections Biodiversity Net Gain \(BNG\)-Guidance](#)

Template User Guide

This template provides a series of tables, figures and text boxes. Complete these to show how you’ll create, enhance, manage, and monitor the biodiversity net gain (BNG) habitats.

Small Sites HMMPT Habitat Guide

The accompanying [Habitat Guide](#) provides descriptions of proposed habitat types and conditions allowed in the Small Sites Metric (SSM). These are to assist authors in preparing the habitat creation, enhancement, management and monitoring activities and instructions (the ‘prescriptions’) in sections 3 (SM-T02) and 4 (SM-T04), to achieve the required BNG outcomes. The guide includes target habitat descriptions for a range of typical habitats that can be assessed through the SSM calculation tool. The descriptions illustrate what target habitats should look like in line with the range of conditions possible in the SSM.

Use the guide to help you prepare your plan to achieve the outcomes needed for the habitat(s) selected in your metric calculation. Factor the site-specific conditions of your site into the design. Refer to reputable sources and competent professionals to inform the creation and management methods most suitable to deliver the specific habitat outcomes targeted.

Formatting

The Template uses standard Microsoft Word formatting that has not been locked for editing. Adjust it, as required, to tailor your HMMP for the specific site and according to your preferences. You can increase or reduce the text box sizes, or increase or reduce the size of images, to fit the requirements of your plan.

You can provide and reference additional photographs and plans as separate appendices if required. Provide the reference number of the appropriate appendix. If necessary to include in a separate report, reference the location using the appropriate box within the template. Provide at least one photograph for each relevant area habitat, hedgerow or watercourse feature.

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.

Each text box in this HMMPT has a unique ID to assist reviewers. Do not change the reference code of any Boxes or Tables.

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 Ltd.

Checklist of Contents SM-T01

Please complete the table below to confirm the sections in this Template that have been completed.

Checklist of Contents Completed		Sections completed (please tick)
1.	Project Background	
1a	Project Information	☒
1b	Planning Condition	☒
1c	Roles and Responsibilities	☒
1d	Site Boundary Plan	☒
1e	Land Use Summary	☒
1f	Site Photos	☒
1g	Site Proposals Plan	☒
2.	Management Plan Aims and Objectives	
2a	Site Aims and Objectives	☒
2b	Retained and Enhanced Habitats Protection Measures	☒
2c	Habitat Management Proposals	☒
3.	Establishment and Management	
3a	Creation, Enhancement and Management Targets and Prescriptions	☒
4.	Monitoring	
4a	Monitoring Strategy for Each Habitat, Hedgerow and Watercourse Present On-Site	☒

Version Control SM-T02

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 adapted throughout the management and monitoring period.

Version	Issue Status	Prepared by / Date	Approved by / Date
1.1	Final	19.3.26	TD 19.3.26
1.2	Final	20.4.36	EK 20.4.26

Document Details

Provide ownership, copyright and licensing information within this table.

Authorship Details SM-B01
Based on Preliminary Ecological Appraisal carried out by South Lakes Ecology (report 1125/2), and BNG (small sites metric) assessment October/November 2025.

1. Project Background

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

Project information SM-T01	
Project type	Change of use
Development Name and Address	Land at Poolside, Haverigg
Author	Tamsin Douglas MCIEEM
Landowner	Ethan King
Land Management Organisation	Ethan King
Period covered by this management plan	March 2026- March 2056
Planning authority	Cumberland Council
Planning reference	4/25/2403/0F1
Central OS grid reference	SD1603 7895
Total Site Area	4600m²

- v.

Details of monitoring methods and a monitoring reporting schedule.
- vi.

Details of adaptive management approaches.

Planning Condition

Details of Planning Conditions to be Discharged by this Document SM-B02	
i.	A detailed scheme of habitat creation and habitat enhancement works that demonstrate the delivery of a minimum 10% net gain in biodiversity value post development over a minimum period of 30 years.
ii.	Planned management activities including details of site-wide aims and objectives.
iii.	Details of the persons and organisation(s) responsible for delivery of the habitat creation and habitat enhancement works.
iv.	The habitat condition targets that form the basis of what the Habitat Management and Monitoring Plan is setting out to achieve.

Roles and Responsibilities

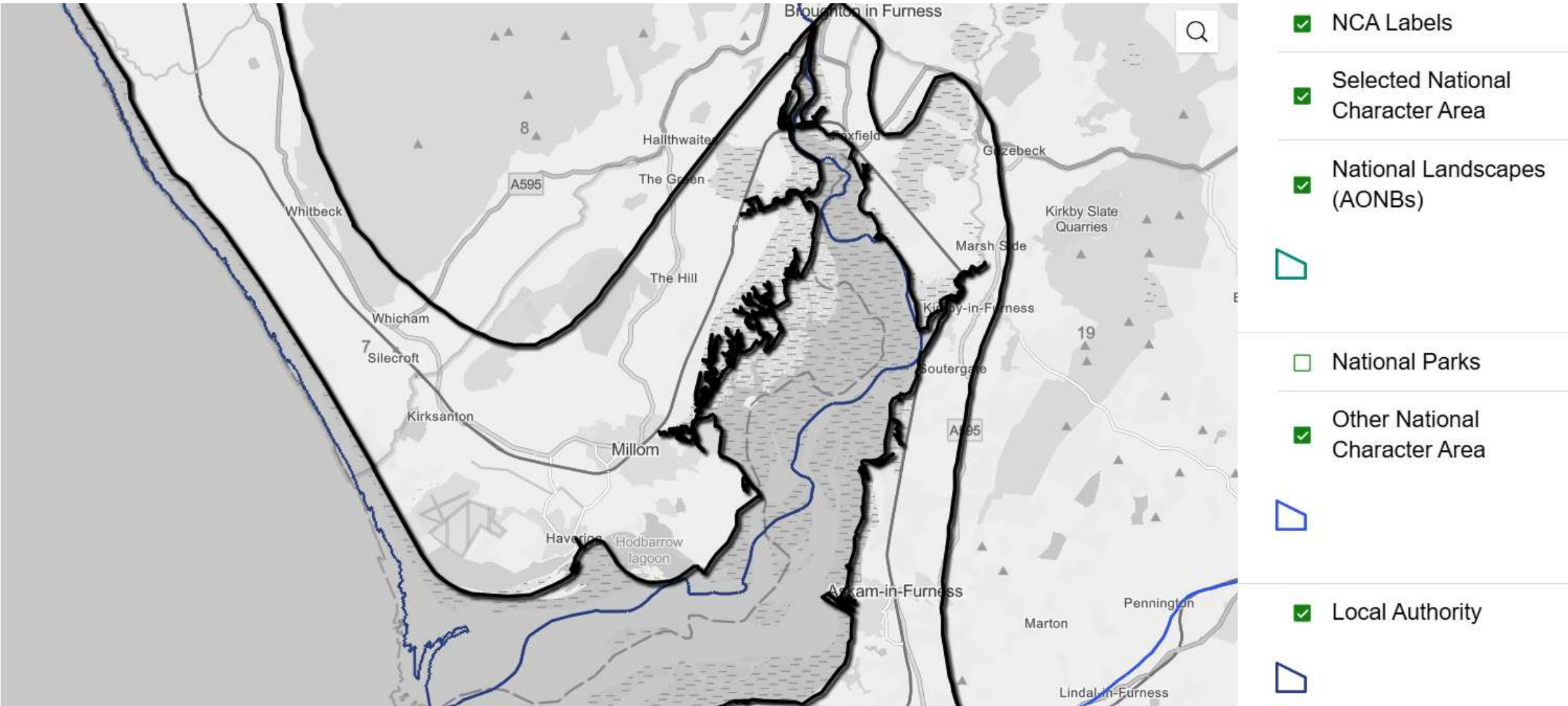
Provide details of the responsible people and organisation(s) delivering this management plan and the legal and funding mechanisms in place to secure the habitat outcomes proposed.

Author Responsible for Preparing HMMP SM-B03				
Name or Initials / Role		Tamsin Douglas MCIEEM		
Organisation		South Lakes Ecology		
Responsibility	Start Date	19 th March 2026	End Date	31 st March 2026
Statement of Competency				
Freelance professional ecologist, trading as South Lakes Ecology for 12 years. Full member of CIEEM.				
Landowner / Management Organisation Responsible for Delivering HMMP SM-B04				
Name or Initials / Role		Ethan King		
Organisation		Landowner		
Responsibility	Start Date	16 th March 2026	End Date	16 th March 2056
Statement of Competency				
Landowner				



Site Context Plan SM-F02

Show the location of the site in context with relevant geographical information, such as National or Local planning policies, that have informed Site and landscape design. These may include (but are not limited to) the National and Local Character Areas, Local Nature Recovery Networks and Biodiversity Opportunity Areas. As a minimum, this plan should illustrate any information that has informed the decision on assigning strategic significance. See the Small Sites Metric (Statutory Biodiversity Metric) User Guide for more information.



NCA 7 West Cumbria Coastal Plain
(No Cumbria strategy prepared when BNG compiled).

Land Use

Description of Site Use - Baseline SM-B05

The land comprises 2 areas. One large grassed field, previously used as a caravan/camp site but now neglected and unused. This has hedgerow boundaries. The smaller land area to the east comprises outbuildings, hardstanding and an allotment garden – all currently in a state of neglect.

The large field comprises modified grassland (upper photo). The small field is a combination of urban habitats (garden and building/ hard standing)- lower photo.

Description of Site Use - Proposed SM-B06

New outbuilding and access are proposed, and removal of old outbuildings. The garden will be restored with new trees planted.

The large field will remain undeveloped, and hedgerow boundaries maintained and extended.

Site Photos SM-F03

Please include two overview photographs of the site in its current form here. Include additional photographs in the appendix if needed. You can adjust the size of these to suit your management plan. Tick if additional photographs are provided in the Appendices ☐ Reference: [Click or tap here to enter text.](#)



Site Proposals Plan SM-F04

As a minimum, show all the proposed habitats to be retained, created or enhanced.
The map could be on an aerial photo, or a sketch map showing mapped habitat polygons. Include parcel references if possible. It is also helpful to include a north arrow and scale.



2.

New hedgerow will be immediately north-east of the new building, to be contiguous with the existing hedgerow around the modified grassland.

New trees – a group of 7 fruit trees, and 6 individual native deciduous trees.

3. Management Plan Aims and Objectives

Overview of Proposed Habitat Aims and Objectives SM-B07

The project will require planting of 13 trees and extension of the hedgerow habitat by 22m to achieve the required net gains.

The large area of modified grassland is being retained, as are all hedgerows. The urban garden habitat will be damaged and re-created.

Retained and Enhanced Habitats Protection Measures SM-B08

The retained grassland will not be impacted by works, and will not be needed for site access. There are no proposals to develop this area. The grassland will be cut at least annually to maintain it, with a view to grazing it as pasture once the field is stock-proofed.

All boundary hedgerows will be retained and managed appropriately – with no cutting of hedges between March and August (inclusive). Where possible (and appropriate) non-native species will be removed and replaced with native species.

Summary of Adaptive Management Approaches SM-B09

Ongoing observation will define whether any adjustments are made to the management of the hedgerows and grassland. As the landowner is responsible for the management of the land, no formal monitoring of this is required as they will be onsite regularly.

Modified grassland – all retained and managed initially by cutting, and then grazing when field is stock-proofed.

Hedgerows – all retained and managed using appropriate techniques (cutting or hedge-laying).

Enhanced Habitats SM-B12

None

Created Habitats SM-B13

The hedgerow will be extended by 22m alongside the north-eastern boundary of the site.

New hardstanding (access drive), outbuilding and gardens with planting of individual trees (13 total).

Habitat Baseline Description SM-B10

Modified grassland (unmanaged, low diversity, few forbs)

Urban habitats (garden and outbuildings) – neglected and overgrown

Hedgerows (robust and unmanaged, with some non-native species)

Retained Habitats SM-B11

4. Creation, Enhancement and Management

Creation, Enhancement and Management Targets and Prescriptions SM-T02

Complete the planned prescriptions for each area habitat, hedgerows and watercourse proposed on-site in the table below to confirm how created and enhanced habitats will be established and managed. Include details on how retained habitats will be managed. At a minimum, list each area habitat, hedgerow or watercourse entered into the Small Sites Metric (Statutory Biodiversity Metric) calculation tool in the ‘Habitat/Feature Type’ column in the table below (SM-T02) and provide specific creation or enhancement and management prescriptions. If preferred, provide multiple rows for the same habitat/feature type where different prescriptions are to be used in different parcels/features, hedgerows or watercourse. Refer to the SSM HMMPT [Habitat Guide](#) for additional guidance on target habitat types and conditions to guide your prescriptions. If appending any additional documents that contain prescriptions or work schedules, please tick here and provide a reference: ☐ Reference: [Click or tap here to enter text.](#)

Habitat/Feature Type	Target Condition	Parcel/ Feature Ref	Habitat Creation or Enhancement and Management Prescriptions
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Individual trees	Moderate		Thirteen young bare-rooted trees (1.25-1.5m height) should be planted over the winter months (November to March), with a minimum gap of 2.5m between trees to allow them to develop full crowns. Figure 5 in the Appendices of the PEA gives a suggestion of planting locations, but these can be anywhere within the red line boundary. A cluster of 7 fruit trees will be planted (a mixture of apple, pear, cherry and plum/ damson), and 6 native trees (can be any locally native species – such as rowan <i>Sorbus aucuparia</i>, Sessile oak <i>Quercus petraea</i>, bird cherry <i>Prunus padus</i>, wild cherry <i>Prunus avium</i>, crab apple <i>Malus sylvestris</i> or sycamore <i>Acer pseudoplatanus</i> (<i>accepted native species</i>). All plants purchased should be UK native species, certified disease free and UK grown from a reputable supplier. Planting will be carried out when the main ground works in the garden area are complete – anticipated February/ March 2027. Pre-planting – prepare the ground, removing any perennial weeds. Plant each sapling in early spring – but not if the soil is frozen or waterlogged (vole collar recommended to avoid damage from rodents). No staking required (to encourage strong root growth). Water on planting and then only if very dry/ hot conditions until the sapling is well established. Allow trees to develop full crowns, only managing trees when appropriate (such as pruning for fruit trees). This should ensure that trees attain at least moderate condition within the 30 year timeframe.
Hedgerow	Moderate		The proposed new hedgerow will be behind the new outbuilding, acting as a screen for neighbouring properties, and will link into the existing hedgerow forming the north-eastern boundary. It is a short length of hedge, but it can still host a diversity of native species. Suitable species that can cope with the coastal conditions include hawthorn (<i>Crataegus monogyna</i>), blackthorn (<i>Prunus spinosa</i>) and elder (<i>Sambucus nigra</i>). A mix of 30% blackthorn, 30% hawthorn, 10% elder, 10% crab apple, 10% hazel and 10% dog rose (<i>Rosa canina</i>) is recommended. All plants purchased should be UK native species, certified disease free and UK grown from a reputable supplier. The hedgerow should be planted between November and March, but not in frozen ground. Planting will be carried out when the main ground works in the garden area are complete – anticipated February/ March 2027. 1. Prepare the ground – removing all surface vegetation and perennial weeds. 2. Keep the rootstock of the young trees damp until they are planted, to maximise survival. 3. Plant the seedlings in a staggered double row, 5 per metre. The 22m hedge will require 110 saplings (33 each of blackthorn and hawthorn, and 11 each of crab apple, hazel, elder and dog rose). 4. Voles and rabbits are likely to nibble on the young trees – so they should be planted with protection tubes until they are well established. 5. The new plants shouldn't need watering, unless there is extreme dry weather in the early part of the growing season (April- May). Allow the hedgerow to grow tall and robust, with no cutting/ trimming for at least 5 years – ensuring the hedgerow will attain at least moderate ecological condition.

Risk Register and Proposed Remedial Measures SM-T03

Complete the risk register by identifying likely risks that could impede the successful delivery of target habitats, hedgerows or watercourses. List all risks that could reasonably be anticipated. This should not be an exhaustive list as it will not be possible to anticipate all potential risks.

Risk Factor	Habitat/Hedgerow/Watercourse Type	Trigger for Action	Remedial Measure
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Failure of tree and hedge saplings due to climatic factors or disease.	Hedgerow, individual trees.	Dead/ diseased saplings	Remove and replace with similar species (or alternative species if the affected species is not suited to conditions).
Damage from rodents or deer	Hedgerow, individual trees	Nibbled shoots, damaged sapling	Put tree guards around young plants to protect from browsing damage from deer (mesh better than plastic to allow lateral spread of branches). Plastic vole collars should be put around the base of the sapling to protect from small rodents

5. Monitoring

Monitoring Strategy for Each Habitat, Hedgerow and Watercourse Present On-Site SM-T04

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

Habitat/Feature Type	Monitoring Methods	Monitoring Interval and Timing
Individual trees	Annual check in spring to ensure saplings are alive and thriving	Annual check each spring
Hedgerow	Annual check in spring to ensure saplings alive and thriving	Annual check each spring

Monitoring Reporting SM-B14

Organisation Responsible for Submitting the Monitoring Reports	Ethan King	Organisation Receiving and Responsible for Reviewing Reports	Cumberland Council
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Monitoring reports must be submitted to the Council during years 2, 5, 10, 25 and 30- post completion of the habitat creation and habitat enhancement works detailed in the Habitat Management and Monitoring Plan. Assuming planting in Spring 2027 – reports are due in the year of 2029, 2032, 2037, 2052 and 2057.

A simple report with photographs showing the trees/ hedgerow in situ and growing well would be sufficient evidence to demonstrate the required gains.