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Habitat Management and Monitoring Plan

Survey site:

Grove Court Hotel Cleator Cumbria, CA23 3DT

Client:

Frank Scott Builders Ltd

Report date:

16th July 2026

The survey results and recommendations contained within this report are valid for 18 months.

Project:

This report is prepared to inform a planning application with Cumberland Council (Copeland Area). The proposal is described as:

The construction of six dwellings (council reference: 4/25/2048/0F1).

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Guidelines

A Habitat Management and Monitoring Plan (HMMP) is a key document in the long-term stewardship of habitats created, enhanced, or restored as part of a development. It is essential in the context of Biodiversity Net Gain (BNG), a legal requirement under the Environment Act 2021, which mandates that developments must deliver a minimum 10% net gain in biodiversity and ensure its maintenance for at least 30 years. The HMMP outlines how newly created or enhanced habitats will be managed, monitored, and maintained to achieve their intended ecological value over time, ensuring compliance with BNG commitments.

The HMMP is designed to align with UK regulatory frameworks, including Natural England's guidance on habitat management, local planning authority policies, and the National Planning Policy Framework (NPPF) such as the 'British Standard 42020 (2022) 'Biodiversity – Code of Practice for Planning and Development'.

Proportionality

The work involved in preparing and implementing all ecological surveys, impact assessments and measures for avoidance, mitigation, compensation and enhancement should be proportionate to the predicted degree of risk to biodiversity and to the nature and scale of the proposed development. Consequently, the decision-maker should only request supporting information and conservation measures that are relevant, necessary and material to the application in question. Similarly, the decision-maker and their consultees should ensure that any comments and advice made over an application are also proportionate.

This approach is enshrined in Government planning guidance, for example, section 15 of the National Planning Policy Framework for England.

The desk studies and field surveys undertaken to provide a preliminary ecological appraisal (PEA) might in some cases be all that is necessary.

(BS 42020:2022)

In consequence of the scale and intensity of the proposed development, this plan-led report is considered adequate and proportionate. It communicates all relevant information necessary to determine a planning application or support the recommendations for further surveys.

Version control

Status	Issue	Name	Date
Draft	0.1	Somerled Macdonald BSc (Hons), MSc – Graduate Ecologist	16/07/2026
Review	0.2	Jamie-Lee Anderson BSc (Hons) – Principal Ecologist	17/07/2026
Final	1.0	Somerled Macdonald BSc (Hons), MSc – Graduate Ecologist	17/07/2026

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1.0 Introduction and Context

1.1 Background

Arbtech Consulting Ltd were commissioned by Frank Scott Builders Ltd to produce a Habitat Management and Monitoring Plan (HMMP) for a proposed development at Grove Court Hotel Cleator Cumbria, CA23 3DT (hereafter referred to as the site).

The site has been subject to previous ecological assessments of relevance to this report, comprising:

- A Preliminary Ecological Appraisal (PEA) and Preliminary Roost Assessment (PRA) (Arbtech Consulting Ltd, 2025).
- A Biodiversity Net Gain Assessment (BNG) (Arbtech Consulting Ltd, 2025).

1.2 Planning Conditions

Following the submission of planning application 4/25/2048/0F1, planning permission was conditionally granted. The decision notice includes conditions that relate to ecology; of relevance to this report, Condition 11 states:

“Within 30 days from the date of the decision a Habitat Management and Monitoring Plan must be submitted to and approved in writing by the local planning authority. The Habitat Management and Monitoring Plan shall include the following:

- 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 30years.*
- 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.*
- v. Details of monitoring methods and a monitoring reporting schedule.*
- vi. Details of adaptive management approaches.*

Reason: In the interests of ensuring measurable net gains to biodiversity and in accordance with the provision of Strategic Policy N3 of the Copeland Local Plan 2021-2039, the National Planning Policy Framework and The Environment Act 2021.”

1.3 Project Description

The planning application pertaining to the site (Cumberland Council reference: 4/25/2048/0F1) describes the development as: The construction of six dwellings. (hereafter referred to as the proposed development). A plan showing the proposed development is provided in **Appendix 1**.

1.4 Site Context

The survey site is centred on National Grid Reference NY 01931 14062 and has an area of approximately 0.389ha. The site comprises an area of previously developed land, where a hotel building was previously situated. The building has since been demolished, with associated works approved in line with planning permission 4/23/2106/001. The site also contains a strip of grassland and single tree, on the southern boundary of the site. The site is located within the village of Cleator, Cumbria and is bound by the A506 to the south, and dwellings to the east and west, the presence of which is likely to present a significant dispersal barrier for a number of faunal groups. A site location plan is provided in **Appendix 2**.

1.5 Scope of This Report

This Habitat Management and Monitoring Plan (HMMP) has been prepared to support the delivery of Biodiversity Net Gain (BNG) in accordance with the Environment Act 2021 and the approved Biodiversity Gain Plan for the development. BNG has been calculated using the Statutory Biodiversity Metric, and all habitat creation, enhancement, and retention detailed within this HMMP is intended to achieve and maintain the target habitat types and condition assessments specified within the approved metric.

The habitats managed under this HMMP are required to be maintained for a minimum period of 30 years from the completion of establishment works. Target habitat condition scores set out in the Statutory Biodiversity Metric define the required standard of success for each habitat parcel. Monitoring outcomes will be assessed against these target condition criteria.

Where monitoring identifies that habitats are not progressing towards, or are failing to achieve, their target condition, remedial management actions will be implemented in accordance with the adaptive management framework set out in this HMMP. This ensures that the required biodiversity gains are secured and maintained for the full management period.

Any biodiversity gains delivered off-site, where required to meet statutory BNG obligations, are secured through separate legal mechanisms and do not rely on the successful delivery of this HMMP.

2.0 Ecological Baseline Conditions Relevant to This Report

The baseline ecological conditions of relevance to this report were determined as a result of the PEA PRA and BNG Assessment.

2.1 Habitat Degradation

The site has not been subject to any degradation since 30th January 2020, and as such, the baseline biodiversity value of the site is derived from the site as observed during the Preliminary Ecological Appraisal (Arbtech Consulting Ltd., 2025).

2.2 BNG and Proposed Habitat Creation

The development, as currently proposed, is anticipated to result in a -17.41% net loss for area-based habitat units. The post-development habitat coverage and their target conditions in accordance with the BNG Assessment are detailed in **Table 1** below. Note that the remaining deficit will be offset through the purchase of biodiversity units.

Table 1. Proposed post-development habitats.

Broad Habitat		Proposed Habitat Type	Area	Condition
Retained	Urban	Developed land; sealed surface	0.0366 ha	Condition N/A
	Individual trees	Urban Tree	0.0366 ha (1 large tree)	Good
Created	Urban	Vegetated garden	0.1168ha	Condition N/A
	Individual trees	Urban trees	0.0407ha (10 small trees)	Moderate
	Urban	Developed land; sealed surface	0.182ha	Condition N/A
	Urban	Artificial unvegetated; unsealed surface	0.0292ha	Condition N/A

2.3 Significant on-site Enhancements

Significant on-site enhancements are defined as habitat creation or habitat enhancement measures that make a material contribution to the biodiversity net gain (BNG) delivered by the development, relative to the pre-development baseline biodiversity unit value as calculated using the Statutory Biodiversity Metric. The retention of existing habitats, where no improvement in condition or distinctiveness is achieved, does not constitute a significant on-site enhancement for the purposes of BNG.

For this development, the following measures are considered to represent significant on-site enhancements:

- The creation of habitats of medium distinctiveness (urban trees).

2.4 Scope for Management

Urban habitat types that generate negligible post-development biodiversity units do not require specific management or monitoring and are not considered further within this HMMP. Habitats of low distinctiveness and retained baseline habitats do not require targeted enhancement to meet BNG objectives; however, their retention is necessary to maintain compliance with the approved BNG assessment. These habitats will therefore be subject to periodic monitoring over the 30-year management period. Created and enhanced habitats of medium distinctiveness or above constitute significant on-site enhancements and will be subject to specific management and monitoring to ensure they achieve their target condition within the 30-year term.

Considering the above, the following management and monitoring is required for post-development habitats:

- **No management or monitoring**
Retained developed land; sealed surface, artificial unvegetated, unsealed surface and vegetated garden.
- **Monitoring only**
N/A
- **Management and Monitoring**
Newly created individual trees and the large, retained tree.

3.0 HMMP

3.1 Site Monitoring

Site monitoring detail is provided in **Table 2** below.

Table 2. Site monitoring

Mitigation	Specification				
Persons Responsible and Lines of Communication	The details of the responsible persons and organisation(s) for delivering this management plan are outlined below.				
	Table 2.1. Organisation responsible for providing HMMP				
	Project Ecologist or Other Professional Responsible for HMMP				
	Name or Initials		Somerled Macdonald BSc (Hons), MSc – Graduate Ecologist		
	Organisation		Arbtech Consulting Ltd		
	Responsibility	Start Date:	Commencement of works	End Date:	30 years following completion of the last establishment works
	Arbtech Consulting Ltd is responsible for producing this HMMP and providing ecological advice for the creation, management, and monitoring of the habitats on site, as well as other constraints to achieving the site's aims, e.g., any protected species presence. Any other competent persons required are to be appointed by the landowner. This will ensure that the HMMP is implemented in full and that all created habitats are in a fit state to meet objectives.				
	Statement of Competency				
	Arbtech Consulting has provided ecological consultancy services since 2006 and has expertise with Biodiversity Net Gain, including the statutory metric, BNG plans and management plans. The author of the HMMP is an ecologist of 1 years' experience.				
	Table 2.2. Landowner or land manager				
	Landowner or Land Manager				
	Name or Initials		N/A		

Organisation		Frank Scott Builders Ltd		
Responsibility	Start Date:	Commencement of works	End Date:	30 years following completion of the last establishment works

Table 2.3. Organisation Responsible for Implementing the HMMP

Organisation Responsible for Implementing the HMMP				
Name or Initials		N/A		
Organisation		Frank Scott Builders Ltd		
Responsibility	Start Date:	Commencement of works	End Date:	30 years following completion of the last establishment works

Frank Scott Builders Ltd has been selected as the Development Biodiversity Champion for the habitat creation phase of the development. Frank Scott Builders Ltd will be responsible for ensuring all actions outlined in this document are implemented. Any queries with regards to the mitigation and enhancement prescriptions will be addressed to the project ecologist, and communication will be retained between the Frank Scott Builders Ltd and the project ecologist throughout the project. Frank Scott Builders Ltd will be responsible for understanding when an Ecological Clerk of Works is required on site to supervise works, requirements of which are detailed within each mitigation section where necessary.

Once the development is complete, Frank Scott Builders Ltd will act as the Post-Development Biodiversity Champion and will be responsible for implementing the proposed long-term management. Frank Scott Builders Ltd will be responsible for ensuring all recommended management is undertaken and any associated remedial measures are completed where necessary.

Table 2.4. Organisation responsible for reviewing HMMP

LPA or Responsible body Reviewing HMMP	
Name or Initials	N/A
Organisation	Cumberland Council

	<table><tr><td>Responsibility</td><td>Start Date:</td><td>Commencement of works</td><td>End Date:</td><td>30 years following completion of the last establishment works</td></tr><tr><td colspan="5">To ensure that the HMMP and legal agreement are followed, the objectives of the HMMP are delivered, and to take enforcement action should a breach occur.</td></tr></table>	Responsibility	Start Date:	Commencement of works	End Date:	30 years following completion of the last establishment works	To ensure that the HMMP and legal agreement are followed, the objectives of the HMMP are delivered, and to take enforcement action should a breach occur.				
Responsibility	Start Date:	Commencement of works	End Date:	30 years following completion of the last establishment works							
To ensure that the HMMP and legal agreement are followed, the objectives of the HMMP are delivered, and to take enforcement action should a breach occur.											
Creation Period	Habitat enhancement and creation works will be scheduled to take place following the completion of major development works to ensure newly created habitats are not damaged during construction activities. On-site biodiversity gain works will be implemented within 6 months of the completion of construction, and the 30-year management period will commence from the date of completion of all biodiversity enhancement works. The proposed timeline is as follows: 1. Pre-Development (Prior to Construction) • Identify and protect any existing ecological features that must be retained, such as the large tree to be retained. • Implement measures and avoid to areas designated for habitat creation to prevent soil compaction or contamination. 2. Post-Development (After Major Construction Works) • Soil Preparation Remove any construction debris and de-compact soil as necessary. Undertake any excavation or reprofiling works for pond enhancement, including removal of nutrient-rich sediments where necessary. • Initial Establishment and Maintenance (First 1–2 Years) Implement a sensitive cutting regime as to not destroy the habitats. Avoid the use of herbicides and artificial fertilisers to maintain habitat integrity. • Long-Term Management Continue appropriate management strategies outlined in Table 3. Adjust management practices if required, having discussed this with the SQE. This phased approach ensures that the habitat establishment aligns with best practices and maximises biodiversity benefits while avoiding damage from construction activities.										
Post-Development Monitoring	Post-development site visits will be undertaken by a Suitably Qualified Ecologist (SQE) over the 30-year management period to confirm the successful installation, establishment and ongoing management of habitats and species-specific enhancements. Monitoring visits will be completed in years 1, 2, 5, 10, 15, 20, 25 and 30 following occupation of the development. The success of habitat creation and enhancement will be assessed with reference to the target habitat condition criteria defined within the Statutory Biodiversity Metric. Monitoring will focus on habitat structure, species composition and evidence of appropriate management, rather than absolute species richness targets, and will be informed by professional judgement of the SQE.										

	Success indicators may include, but are not limited to: • Establishment of characteristic species appropriate to the target habitat type; • Habitat structure consistent with the intended condition category (e.g. sward height variability, age and structural diversity of trees and shrubs); • Absence, or effective control, of invasive non-native species or dominant undesirable species; and • Evidence that management prescriptions are being implemented at the required frequency and intensity. A monitoring report will be produced following each SQE visit, detailing findings, photographic evidence and any required remedial actions. Remedial management may be triggered where monitoring identifies a failure to meet interim or target habitat condition criteria, where habitat establishment has been compromised by unforeseen factors (such as drought, flooding, soil compaction, vandalism or disease), or where management prescriptions have not been implemented as specified. Where remedial action is required, the SQE will recommend proportionate corrective measures, which may include adjustments to management regimes, re-seeding or re-planting, soil remediation, or enhanced control of undesirable species. The scale of evidence required to confirm implementation of remedial actions will be defined by the SQE and may include additional site visits or photographic evidence provided by the Post-Development Biodiversity Champion.
Adaptive Management	Adaptive management is a structured and systematic approach to natural resource management that involves the ongoing monitoring and evaluation of management actions, followed by informed adjustments to improve outcomes over time. It is an iterative process whereby management actions are implemented, monitored against defined objectives, and reviewed to inform subsequent management decisions. Monitoring results will be used to inform any necessary changes to management practices in order to support the achievement of Biodiversity Net Gain (BNG) targets set out in the statutory biodiversity metric and this Habitat Management and Monitoring Plan (HMMP). Monitoring also enables the early identification of unforeseen external influences that may affect the delivery of objectives, such as the emergence of plant disease, the spread of invasive species influenced by climate change, or changes to site accessibility resulting from flooding. In addition to formal monitoring, observations and records arising from routine site management are a critical component of effective adaptive management. Appropriate mechanisms should be established to ensure that such information is captured, reviewed, and incorporated into revisions of management prescriptions, and subsequently reflected in monitoring reports. Regular, robust monitoring and reporting to the responsible authority will enable potential issues to be identified at an early stage, allowing timely and proportionate management responses to be implemented. Where external factors significantly affect the achievement of BNG objectives, any proposed amendments to management prescriptions or targets should be agreed with the responsible authority. Following such reviews, all changes will be clearly documented within this management plan and the associated management and monitoring schedule.

Legal Responsibility	It is expected that compliance with this HMMP will be legally enforced through a planning condition or Section (s) 106 agreement. As part of this legal agreement, habitat creation and management detailed within this HMMP will need to be retained and appropriately managed for the entire 30-year term to meet legislative objectives outlined in the Environment Act (2021). Should any future development at the site be proposed that will impact habitats that deliver the required gain as part of the planning conditions/s106 agreement, this will need to be considered and suitably compensated for in accordance with any future plans.
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3.2 Habitat Creation and Management

Best practice habitat creation and management over a 30-year term to ensure a BNG consistent with that reported within the BNG Assessment is provided in **Table 3** below. The final BNG Habitat Plan is provided in **Appendix 3**.

Table 3. *Habitat Creation and Management Prescriptions*

Ecological receptor	Specification
Habitats with N/A or poor target conditions	It is noted that developed land; sealed surface, artificial unvegetated; unsealed surface and vegetated garden do not require any specific management to achieve their BNG objective. This is because developed land; sealed surface and artificial unvegetated; unsealed surface are of negligible biodiversity value. Vegetated garden is predetermined as condition N/A within the Statutory Biodiversity Metric. As such, management prescriptions for these habitat types are not included in this HMMP.
Individual trees	Overview: It is proposed to retain 0.0366ha of individual tree (1 large tree) in good condition and create 0.0407ha of individual trees (10 new small trees) of moderate condition. Objectives: - To plant individual trees in moderate condition by passing condition criteria A, B, C and/or F (as a minimum) in accordance with the Individual Trees Habitat Type Condition Sheet and BNG Assessment. - To plant trees that will provide pollinating, foraging, and refuge opportunities for protected and/ or notable species groups, including invertebrates, bats, and birds. Tree planting Creation Method: Ground preparation and planting The locations for tree planting will be cleared and reduced to compacted permeable bare ground in preparation for planting. Planting substrate

	must comprise site-won material with any deficiencies made up of imported topsoil compliant with BS 3883:2015. Each tree will be pit planted upright within the centre in accordance with BS 4428:1989, within a hole at least 500mm greater than the root system when fully spread and at a depth 250mm greater than the root system. Root balls will be soaked thoroughly in water and loosened to expose restricted roots before planting. The planted trees will then be backfilled, ensuring there are no air pockets around roots or any roots protruding out of the ground. • Timing The land will be prepared during the summer, ready for planting between November and March. Planting trees before the new year helps ensure better rooting and subsequent establishment, including faster growth during the first growing season. • Species All tree species will be native and sourced from a nearby supplier to ensure local provenance. Silver birch was selected, as per the BNG assessment. Risks: • Tree failure and/or poor establishment - poor stock quality, drought stress, or unsuitable soil conditions may lead to mortality • Damage from pests, diseases, or vandalism - disease and vandalism can reduce survival rates • Inappropriate species selection - trees not suited to local soil, hydrology, climate, or landscape context may fail or cause long-term management issues. • Extreme weather - drought, flooding, high winds, or frost can negatively affect the establishment of young trees • Damage during maintenance – mowing and strimming may damage stems or roots • Inadequate aftercare and monitoring - lack of watering, inspections, or replacement planting may compromise the long-term success of trees. Management prescriptions covering a 30-year term: Table 3.1: New tree planting management prescriptions. <table><tr><th>Management</th><th>When</th><th>Rationale</th><th>BNG condition criteria compliance</th></tr><tr><td>Prepare planting area in summer, in preparation for autumn/ winter planting.</td><td>Year 1 – June/ July/ August</td><td>To ensure the ground is dry and workable.</td><td>n/a</td></tr><tr><td>Plant native trees only within prepped areas in Autumn, whereby the canopy</td><td>Year 1 – September/ October/ November</td><td>To ensure trees take root and establish prior to the first</td><td>A & F</td></tr></table>	Management	When	Rationale	BNG condition criteria compliance	Prepare planting area in summer, in preparation for autumn/ winter planting.	Year 1 – June/ July/ August	To ensure the ground is dry and workable.	n/a	Plant native trees only within prepped areas in Autumn, whereby the canopy	Year 1 – September/ October/ November	To ensure trees take root and establish prior to the first	A & F
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Plant native trees only within prepped areas in Autumn, whereby the canopy	Year 1 – September/ October/ November	To ensure trees take root and establish prior to the first	A & F										

	oversails the vegetation		growing phase, the following spring.	
	Standard trees will be staked and tied using a 75mm diameter stake with the bark removed. The stakes will be long enough to allow for 600mm of the stake to be driven into each pit. Stakes will be fitted prior to tree planting to prevent root damage.	Year 1 – Immediately prior to planting.	Protect roots from damage.	B & D
	Ensure the stakes and ties are not restricting growth and are not damaged. Replace where necessary.	Year 2 onwards – Checked annually for the first 5 years.	Ensure growth isn't stunted.	B & D
	Remove stakes and ties.	Year 5 in Spring – April/ May	Allow trees to grow unperturbed once established.	B & D
	Removal of spent flowers is to be done through 'deadheading'	Years 1 – 5 - Twice annually, late spring and in the Autumn.	Allows trees to place more energy into re-growth.	B & D
	At the end of each growing season, all plant failures are to be 100% replaced	Year 2 onwards - Checked annually for the 30-year term after each growing season in Autumn.	To ensure the success of planted trees.	B & D
	Remove weeds	Year 2 onwards - Checked annually for the 30-year term after each growing season in Autumn.	Reduce competition for resources.	B & D
	Application of bark mulch at a depth of 50 mm	Year 2 onwards - Checked annually for the 30-year term after each growing season in Autumn.	Reduce competition for resources.	B & D
	Do not apply chemical fertilisers	At all times.	The use of chemical fertilisers will encourage vigorous grasses and weeds to grow	D
	Watering should be undertaken before and after planting out, and as necessary for the continued thriving of all	Annually - for the 30-year term, when required following prolonged periods of drought.	Ensures plants do not dry out and subsequently fail.	B

	planting.			
	Undertake any pruning requirements outside of the nesting bird season, which is between March and September inclusive.	At all times.	Ensure no active bird nests are impacted by maintenance works.	E

4.0 Bibliography

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Appendix 2: Site Location Plan



Appendix 3: Post Development Habitat Plan

