

Fareham Borough Council Council Trees Service Review

1. Tree Review Aims and Methodology

Introduction

This document sets out the findings of the review of the Council Trees Service which took place between October 2019 and August 2021. Options for how the Service could be delivered in the future are set out following which preferred proposals are put forward. The preferred proposals balance the need to ensure that the Borough's trees and woodlands are managed in an effective way whilst delivering good value to our customers.

Why conduct a review?

- The number of trees owned and/or maintained by the Council has risen significantly during the last ten years.
- There is a perception that the cost of managing the Council's trees is increasing in an unsustainable manner.
- The significant financial challenges faced by the Council, have been intensified by the impact of COVID-19. The Council's tree service has exceeded its budget provision in recent years. This review was therefore added to the Opportunities Plan to identify ways to reduce the level of expenditure needed for the service.
- It is therefore important to understand how the Council can continue to ensure a well-managed stock of trees within the Borough, within budgetary constraints.

What were the aims of the review?

The Council Trees Service review scope was to:

- Apply systems thinking (Vanguard) methodology to identify the costs and systems involved in providing the service.
- Identify our statutory functions and those which were discretionary.
- Explore options for alternative models of provision that can help to continue to ensure a well-managed and safe tree stock, whilst reducing the cost of the service.

What was the methodology?

In order to cover the broad scope of the review a number of methods were used:

- A systems thinking approach to identify the costs and systems involved in providing the service.
- The legislative requirements were researched with regards to tree works the Council must undertake and the risks it must manage.
- Identifying inspection, adoptions and maintenance approaches followed by other local authorities within Hampshire.
- Discussions with Officers, relevant Members, partners e.g. Legal Services and the Council's Insurers.
- Much of the financial assessment is based on the financial year 2019/20. This period was used to ensure that the impacts from COVID-19 over the last 18 months did not impact upon the assessments and findings.

2. The local picture

The landscape character of the Borough

- There is a significant amount of tree cover in the Borough's urban areas providing an attractive environment to live and work in.
- The Borough's more rural areas are made up of a diverse range of land types such as chalk downland, coastal landscapes, mud flats, salt marshes and low-lying river valleys.
- These differing landscapes support a broad range of trees.
- There are an estimated 210,000 to 220,000 mature trees on land that the Council owns.

Why do we need to manage our trees?

- The risk of being struck and killed by a tree or branch falling is extremely low for those trees in or next to areas of high public use.
- Legally the Council needs to take reasonable steps to ensure its trees do not pose a significant risk to people or property.
- The Council does not actively manage (i.e. inspect or maintain), every tree it owns as it does not need to.
- The Council only actively manages those trees which may pose a risk to people or property.
- There are approximately 21,000 trees which the Council actively manages.

Tree Strategy

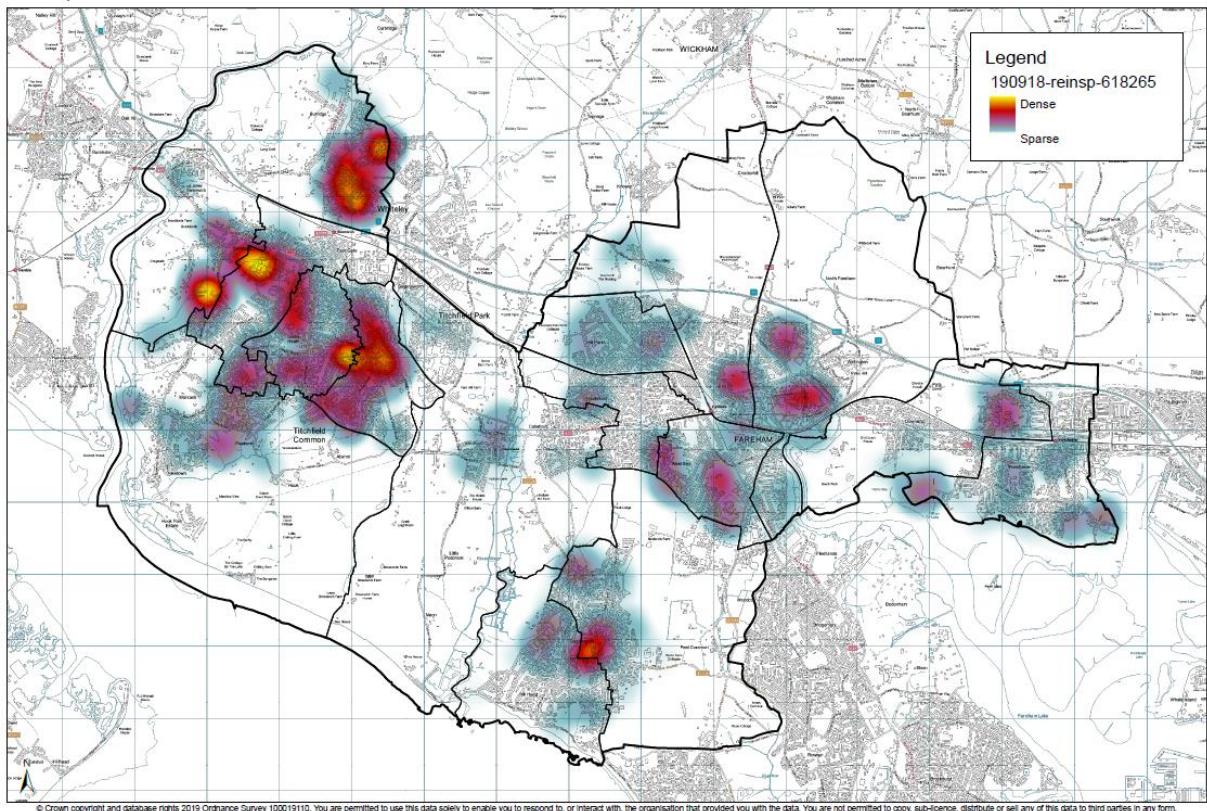
- The Council's Tree Strategy was last updated in 2012.
- The importance of the role trees play in improving the environment and mitigating against the effects of climate change has continued to increase.
- The financial challenges faced by local government have also significantly increased during this period.
- One of the outcomes of the review is to update the Tree Strategy to reflect the agreed proposals.

What trees are the Council responsible for?

- The Council is responsible for an estimated 210,000 to 220,000 mature trees on more than 290 hectares (equivalent to 406 football pitches) of public open space, housing areas and woodlands.

The map below identifies where the majority of trees that the Council actively manages are located.

Tree Inspections

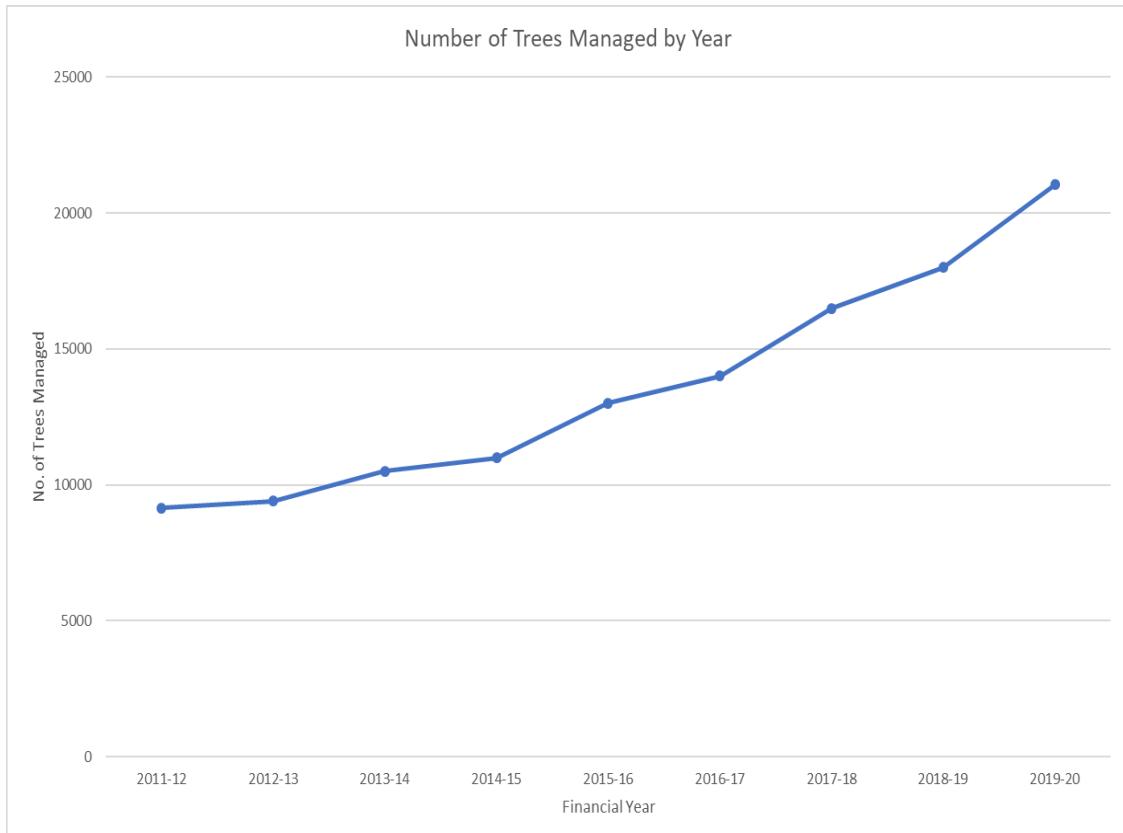


The heat map reflects the locations of the Council owned/managed trees across the Borough. The greater concentration of trees are in the Western Wards of the Borough.

The number of trees the Council is responsible for has increased rapidly

- Whilst the Council does not hold records of every single tree on land it owns, it is estimated that there is in the region of 210,000 to 220,000 mature trees on Council managed land.
- Over the last 10 years, the Council has adopted land with an estimated 140,000 to 160,000 mature trees included.
- In addition to these mature trees there will be a significant number of saplings and immature trees.
- As can be seen in Chart 1 below, the number of trees being actively managed by this Council (i.e. regularly inspected and maintained) has increased from just under 10,000 in 2011/12 to just over 21,000 in 2020/21.

Chart 1: Increase in actively managed trees



- This equated to a 110% increase in the number of trees actively managed by the Council within 9 years, which equates to 1,222 trees every year.

What does the service look like?

The Council Trees Service is within the Planning and Regeneration Directorate. The Tree Team consists of three full time employees comprising a Principal Tree Officer, a Tree Officer and a Tree Assistant. Direct employee costs were £114,662 in 2020/21.

What does the Tree Team do?

The Team has two main roles:

- To undertake all the Council's planning functions in respect of trees. This includes:
 - Serving and reviewing Tree Preservation Orders
 - Dealing with all applications to carry out works to protected trees
 - Providing advice on all tree matters to Planners and the Council's Planning Committee
 - Providing advice on trees to all of the Council's customers.
 - Delivering this part of the Tree Service accounts for around 60% of the Tree Team's total time.
- To manage the trees on Council owned land (irrespective of which part of the Council holds/manages the land. This accounts for around 40% of the Team's time.

Managing Council Trees

There are four main areas of work linked to the management of trees:

Tree inspections: Assess the general wellbeing of Council owned trees and identify any potential health and safety concerns. Recommendations are made to undertake works which will minimise any identified risks posed by the tree. These works are undertaken by an external contractor.

Planned tree works: These works are largely driven by the recommendations following inspections and can include activities such as reducing the length of branches and removing damaged or dead parts of a tree. The Council has a framework of external contractors in place who carry out the works to the Council's trees.

Good neighbour works: Residents approach the Council and ask it to carry out works to its trees when they consider they cause a nuisance (e.g. Overhanging, loss of light).

Tree planting: The Team arranges the replacement of dead or diseased trees in public amenity areas as well as pro-actively planting further trees in sites identified across the Borough.

The four work areas above will be discussed in more detail later in the report.

What does the Council Trees Service cost the Council?

The Council has worked hard to ensure good value for money when managing the Council's tree stock. This is reflected in Chart 2 below, which shows that the annual average cost of each managed tree has largely stayed at or below £20 a year since 2011/12.

Chart 2: Average cost per Council controlled tree between 2011/12 and 2019/20



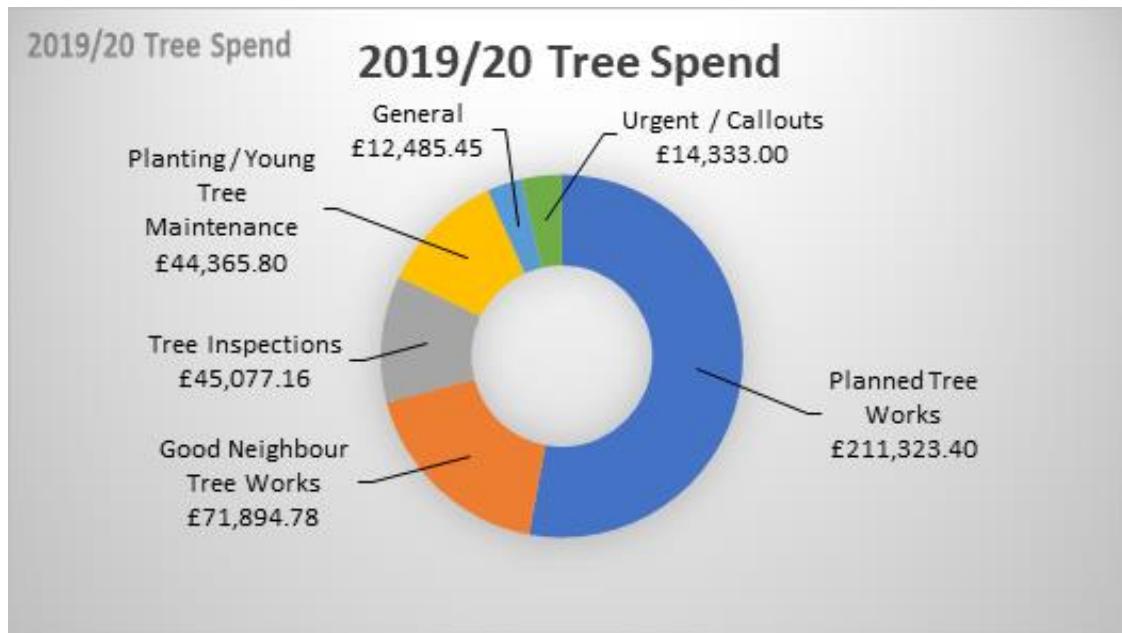
Whilst the spend per tree has stayed relatively constant, the overall spend on trees, (excluding employee costs), has risen significantly, from £150,000 in 2011/12 to approximately £400,000 in 2019/20. As Table 1 shows below, this overall increase in service cost reflects the significant increase in the number of Council managed trees over time. Substantial increases in tree management costs in 2014-16 and 2018-20 reflect works undertaken following the adoption and works to trees at Coldeast.

Table 1: Growth in tree numbers and cost over time

Year	Cost	Approx. Trees Managed
2011/12	£151,785	9,500
2012/13	£141,098	9,750
2013/14	£191,080	10,500
2014/15	£281,300	11,000
2015/16	£278,211	13,000
2016/17	£236,723	14,000
2017/18	£227,120	17,000
2018/19	£330,438	18,000
2019/20	£399,277	21,000

Council Trees Service Costs in 2019/20

Chart 3 below outlines the different service elements which made up the £399,277 spent in 2019/20. This year was chosen as the baseline for analysis as it was the last not impacted by COVID-19.



The actual budget set by Council for this part of the Service for 2019/20 was £120,600, plus around £27,500 recharged to the Housing Revenue account. This meant that there was an overspend against the allocated budget of around £251,000 that year.

Two work areas made up around 75% of the total cost of the Tree Service in 2019/20:

- Planned tree works - £211,000
- Good neighbour works - £72,000

The vast majority of the planned tree works carried out followed on from works identified as part of tree inspections.

Good Neighbour works do not directly correlate to the number of trees being managed. The Council is not legally required to carry out Good Neighbour Works (e.g. to address overhanging, loss of light, leaf litter, nuisance caused by roosting birds, etc) and is in a small minority of Councils undertaking these works.

Responding to financial challenges in 2020/21

Both the regular service overspends, and the wider financial pressures faced by the Council, which were worsened by the impact of COVID-19, meant that a decision was taken to put in place an increased interim budget for both 2020/21 and 2021/22. This was to reflect the increase in the number of trees being managed but had the expectation that spend would stay within the budget provision.

The interim budget would provide budgetary clarity to the team pending results of the Council Trees Service Review and was set at £200,600 plus £30,000 for Housing Revenue Account recharges, for works carried out on land controlled by Fareham Housing.

The remainder of the report looks at options for ensuring that the Council Trees Service continues to offer a high level of service both now and in the future whilst managing and mitigating the risk of any future overspend.

4. Tree Inspections

Why carry out tree inspections?

The Health and Safety Executive classify risk from tree falls within their lowest category of risk. Whilst the level of risk is low, tree owners have a legal duty to take reasonable steps to prevent foreseeable harm to both people and property. Tree inspections are one of the key tools for identifying potential risks to people and property.

How many inspections do we carry out?

Not all Council owned/managed trees are inspected. Only those trees that potentially pose a risk to people or property are inspected. There are currently around 21,000 on the Council's tree inspection register, which are actively managed.

Trees are principally added onto the Council's tree inspection register:

- When the Council adopts or purchases land, the Council makes arrangements for trees on the land to be inspected. Where trees might potentially pose a risk to people or property, they are added to the tree inspection register.
- As younger trees mature and become larger.

Depending on their size, location and characteristics, trees are identified as being of:

- **High risk** – Inspected every year, The Council has 2098 trees in this category
- **Medium risk** – Inspected every 2 years. The Council has 1,766 trees in this category
- **Low risk** – Inspected every 3 years. The Council has 16,548 trees in this category
- **Lowest risk** - Inspected every 6 years. The Council has 480 trees which are considered very low risk e.g. those only recently planted,
- **Awaiting risk assessment**: Around 146 young trees are awaiting a risk assessment.

The overall number of inspections varies from year to year, for example:

- In 2018/19, there were 9,052 inspections
- In 2019/20, there were 4,800 inspections

What is involved in a tree inspection?

The Council employs an external contractor to carry out Tree Inspections on its behalf. Each tree inspection will:

- Assess the general wellbeing of Council owned trees
- Identify any potential health and safety concerns
- Make recommendations for works that could help reduce any identified risks

The appointed Tree Inspector reports back the results of every single inspection and identifies any works they believe should be undertaken to manage any risks posed by the tree. Each tree inspected is recorded on the Council's database, which details:

- The tree's condition
- Species
- Age
- Size
- All previous Inspections and works undertaken.
- Works the Tree Inspector recommends should be undertaken and how quickly the works should be carried out.

Whilst the majority of the recommendations of the Tree Inspector are accepted, the Council's Tree Team review the recommended works and will visit sites and view the situation first-hand when they consider it necessary.

The average annual costs of Tree inspections are around £30,000-£35,000.

How do other Councils approach tree inspections?

In evaluating options for future service delivery, it has been helpful to understand the approaches adopted by other Councils within Hampshire. With this in mind, all Hampshire Councils were asked to complete a survey outlining their approach to tree management, including inspections.

Table 2 over the page identifies the inspection periods of all the Councils that responded to the Council's survey.

Table 2: Inspection Periods Comparison between Councils (years)

Risk	High	Med	Low	Lowest
Fareham	1	2	3	6
Portsmouth	1	0	4	
Test Valley	1	0	5	
Winchester	1.5	3	0	
Hart	1.5	2.5	5	
Eastleigh	2	4	0	
Rushmoor	2	3	0	
New Forest	2-3	4-5	5	
Southampton	2	5	5	
Basingstoke & Deane	Every 5/6 years, apart from small number of more frequent inspections			
Gosport	No defined inspection regime			

- The table shows that there are a range of inspection approaches adopted by local Councils.
- Each Council has adopted their inspection regime with an understanding that it is an appropriate approach to managing the risk of their trees.
- A number inspect their high-risk trees less often than Fareham e.g. New Forest inspect their high-risk trees every 2-3 years, compared to every 12 months by Fareham.
- The same applies for both, medium and low risk trees. For example, the most common frequency for low risk trees is 5-yearly inspections, whereas Fareham inspect them every 3 years. 80% of Fareham's trees are in the low category.
- Overall, Table 2 shows that Fareham's current inspection regime is amongst the most frequent of those Councils that responded.

Is there a direct link between how often we inspect trees and how often we carry out works to trees?

In order to establish whether there is a link between frequency of inspection and the amount of work undertaken, a detailed assessment was undertaken of the frequency of inspections and the amount of tree works undertaken at one of the Council's facilities.

Park Lane Recreation Ground was chosen for a detailed assessment as its 406 trees provide a good representation of the makeup of the tree stock across the Borough, with a range of species, sizes, ages and different inspection categories.

Between the years 2008 and 2019, 1,499 inspections took place at the site. Of these:

- 93% were low risk trees
- 4% were medium risk trees
- 2% were high risk trees

Of the 1,499 inspections, only 16% (243) generated any tree works. This means that the vast majority of inspections did not generate a need for works to trees.

The works that took place were on 151 individual trees. This means that 38% of the works were on trees that have had multiple maintenance activities carried out on them over time.

Analysis

- Tree inspections currently cost on average around £30,000-£35,000 a year and identify the majority of the planned tree works.
- As the Council adopts more land and trees mature, the number of trees that need to be inspected will rise.
- We currently have one of the most frequent regimes of inspections when compared to other Councils in Hampshire.
- From the sample analysed, only 16% of inspections resulted in tree work being carried out.
- The low inspection to tree works ratio, coupled with the examples of how other authorities are operating within the County, indicates that there is potential to reduce the frequency of inspections whilst maintaining a good level of risk management.

Proposed approach

A number of different inspection regimes were assessed. However, the following approach offered the best balance between continuing to manage risk effectively and ensuring good value for money:

- With this in mind, it is proposed that the inspection regime would change to:
 - **High risk trees:** Inspect every 18 months instead of annually
 - **Medium risk trees:** Inspect every 3 years instead of every 2
 - **Low risk trees:** Inspect every 5 years instead of every 3
 - **Lowest risk trees:** Reclassify these into the low risk category instead of inspecting every 6 years
- This approach to inspections would be comparable to other local Councils and is more regular than some such as Southampton and the New Forest.
- Feedback on this proposed approach to inspections would have to be received from our insurers before implementing.
- In addition to moving the small number (408) of lowest risk trees into the low risk category, there is likely to be a reclassification of a minority of trees that were previously on the risk boundary between two categories e.g. moving from low to medium risk.
- It is estimated that the overall number of tree inspections would reduce from an average of around 6,200 a year to approximately 5,300 based on current tree numbers.
- This approach would also free-up a small part of the Tree team's resources, which could be used to focus on areas such as applying for grant funding.
- The annual cost of the contracted inspections under this regime is estimated to be £30,000. This is approximately £15,000 less than the actual spend in the baseline year of 2019/20 and could start to be realised from 2022/23 onwards.
- The tree works recommended during inspections can take a number of months to be completed, depending on the nature of works identified.
- Tree works are priced on a scale determined by the diameter of the tree stem/trunk being worked on. Inspecting less may mean that when the work is undertaken, the cost of the work will be slightly higher.
- Based on present assumptions, a reduction in current spending as set out above is anticipated.
- It is proposed that the financial impact of the changes from the inspection regime and planned tree works (discussed later) be reviewed after 2 years.

5. Planned Tree Works

What type of work is carried out?

- The majority of planned tree works arise from recommendations made following tree inspections.
- In addition to planned works, there is a much smaller number of reactive works carried out every year between trees being inspected. These may include where trees have been identified as dangerous to people or property and are actioned as a priority.
- Tree works can involve tasks such as:
 - Removal of growth around the base of the trunk
 - Crown lifting, thinning or the reduction/removal of branches
 - The felling of dead or diseased trees
 - General pruning and dead wooding
- As would be expected, much of the tree works are at height and require specific arboricultural expertise and equipment.
- The cost of this service element was £211,000 in the financial year 2019/20. There can be a fair degree of fluctuation on this figure. For the last financial year, the figure was £161,000.
- In light of the level of expense it is important to ensure that this service is designed and provided in a way that offers the best value for money.

Where do the planned tree works take place?

The greatest concentration of trees is in the Western part of the Borough. As table 3 shows, this is reflected in the locations of tree works, with 58% of the costs being attributed to the Western Wards.

Table 3: Percentage of Tree Work Spend2008-19 (by ward)

Sarisbury	25%
Park Gate	18%
Locks Heath	11%
Titchfield common	11%
Portchester East	5%
Fareham South	5%
Fareham North West	4%
Stubbington	4%
Fareham North	3%
Fareham West	3%
Hill Head	3%
Portchester West	2%
Titchfield	2%
Warsash	4%
Total	100%

It is important to recognise that about 57% of the spend on tree works in Park Gate is on the Coldeast site. Whilst 31% of the spend in Sarisbury was at Holly Hill Woodland Park, a significant percentage was spent in areas such as Whiteley, where developments have large areas of canopy and many of the publicly accessible areas and homes are close to trees.

The percentage spend in Stubbington is likely to increase in the coming years as the 21,000 trees planted at Daedalus Common mature.

Potential Grounds Maintenance role

All tree works are currently carried out by external tree contractors on the Council's Framework, which followed a competitive tendering exercise. Analysis shows that the service receives very good value from the contractors. The potential for Streetscene to take on some of this work was identified during the review as an area to explore.

The additional equipment that the Council would need to conduct tree works has been explored, as well as the current capacity of the Streetscene service to absorb this work. As a result of considering these issues it was established that:

- Based on discussions with Streetscene, the capital costs for the Council to take on high level tree works are likely to be in the region of £100,000 being to the cost of purchasing the equipment and vehicles needed.
- Any employees would need to be qualified to carry out some of the more technical works, meaning additional expenditure on training, with some posts likely being upgraded.
- Some of the low height works that do not require specialised equipment could potentially be carried out by the Streetscene team. The low-level works are relatively small in number but still contribute to the overall cost of delivering the service.

Proposed Approach

As the skills and equipment are in place, it is proposed that low height works be accommodated within the ground's maintenance work programme from 2022/23 onwards.

Accommodating this work in-house is likely to reduce the expenditure on external tree contractors by £11,700 a year.

It is also proposed to reduce the spend on planned tree works by a further £19,500 compared to the actual spend in 2019/20.

The potential reduction in planned tree works as a result of less frequent inspections proposed earlier, is likely to result in this further reduction in spending. However, due to the lag between inspections and carrying out the recommended works, it will take time for these to become fully apparent.

It is therefore also proposed that the Planned Tree Works budget is reviewed after 2 years to see if any further reductions in spending can be made.

6. Good Neighbour Works

What are Good Neighbour Works?

Customers contact the Tree Team regarding Council owned trees that may be causing the following types of issues to their properties:

- Overhanging branches
- Obstruction of light
- Leaf litter
- Impact on TV reception
- Nuisance caused by birds roosting in overhanging trees

The Tree Team assesses the neighbour impact and decides whether it is appropriate to carry out works on the trees or not. Any works undertaken are normally carried out by external tree contractors.

Works which are requested in respect of perceived nuisance, rather than causing a risk to people or property, are described in this report as 'Good Neighbour Works'. The Council is not under a legal duty to undertake these works.

Carrying out Good Neighbour Works costs the Council around £72,000 a year.

Responding to financial challenges

In response to financial challenges faced by the Council it was decided that Good Neighbour Works would be temporarily suspended from June 2020 onwards.

The Council has received some complaints about the fact that it is no longer carrying out works to its trees when it is perceived they are causing a nuisance.

The level of complaints has not been high, and neighbours are entitled to cut back the Council's trees to the party boundary. The Tree Team provides advice to these customers along with details of who they can approach to get the works undertaken for them.

What do other Councils in Hampshire do?

All Councils within Hampshire that provided information regarding their approach have confirmed that they do not conduct any good neighbour works. Any potential works to mitigate risks to people or properties are undertaken as part of their planned tree works. The only two Councils that did not provide information on their approach were Havant and Basingstoke and Deane.

Therefore, Fareham Borough Council was alone in Hampshire in conducting extensive Good Neighbour Works up until June 2020.

Options considered

Asking for a contribution from customers towards the cost of remedial works was explored as an option. This would require The Tree Team to liaise with customers and arrange the works through external tree contractors.

Whilst this approach would achieve some savings, the Council would still continue delivering a service which it is not legally required to do, nor is it one provided by other Council's in Hampshire.

This approach would also increase the administrative demands on the Tree Team and Finance through processing payments and potentially pursuing debts. There may also be complaints from customers who believe that the extent of works they have paid for are not as great as they would have hoped.

Discussions were held with the Council's external tree contractors to see if they would be able carry out works for residents at the same rates they do for the Council receives. They were however unwilling to do this, as the Council only receives the rates it does because of the volume of work it provides.

Proposed approach

Taking into account all of the factors set out above, it is proposed that the Council no longer carries out Good Neighbour Work.

The Tree Team would continue to provide advice to customers along with details of who they can approach to get the works undertaken for them.

As the service will stop there would be a saving of £72,000 compared to the actual spend in the baseline year of 2019/20.

7. Tree Planting

Why does the Council undertake tree planting?

The Council's Tree Team normally arranges the planting of around 150 trees in the Borough every year. All of the planting is carried out by external contractors. The type of planting is made up of two main categories:

1. Replacement planting:

- The Council will plant replacement trees particularly where a tree is removed in a location with more limited tree cover (for example with some of the Council's areas of open space). These replacement trees account for around 60% of all the trees planted each year.
- In areas where there is extensive remaining tree cover (for example a woodland area) the Council normally allows the area to naturally regenerate rather than undertaking dedicated planting.
- The Council's approach to replacement tree planting means that approximately 20% of trees that die or are felled are 'pro-actively' replaced by the Council.

2. Pro-active tree planting:

- Around 60 new trees a year are pro-actively planted by the Tree Team in urban areas across the Borough.
- Sites for new planting include those set out in the Council's Tree Strategy, sites where requests have been received from residents and Members, along with areas of the Borough where the extent of tree cover is low.
- In addition to this, there are a very limited number of memorial trees planted each year.

What are the costs?

- The individual cost of trees varies, depending on type and size. On average, it costs £179 per tree to plant and maintain e.g. mulch and water, in the first year.
- There will be variations in expense each year, depending on the number of trees, variety and size planted. For example:
 - In 2018/19 we planted 145 trees and spent £45,000, including watering and mulching.
 - In 2019/20 we planted 140 trees and spent £37,000, including watering and mulching.
- A proportion of the annual watering and mulching costs include those for trees planted in previous years as it can take between 3-5 years for a tree to become fully self-sufficient.
- Due to the financial challenges being faced and the interim budget put in place pending the outcome of the Tree Service Review, very little tree planting has taken place recently.

The role of trees in helping to mitigate the effects of climate change

- The Council's Climate Change Action Plan identifies projects and actions to reduce or eliminate the Council's carbon emissions.
- The plan also highlights the need to offset emissions where we cannot reduce or eliminate our carbon output.
- Strategic tree planting on Council owned land was identified as a potential opportunity to be explored to help offset some of the Council's carbon emissions.
- There are broader environmental benefits to tree planting e.g. habitat provision and flood risk reduction.
- To achieve official carbon offsetting accreditation is a costly, complicated and slow process.
- Whilst Strategic Tree Planting could play a role, it is likely that much bigger gains will be made through projects that either aim to eliminate emissions, such as switching to a green energy suppliers, or reduce them e.g. exploring opportunities for replacing some of the Council's fleet with low emission vehicles.

The benefits of a strategic approach to tree planting

- Planting trees together in groups (i.e. strategically), can provide greater benefits than planting trees in very small numbers on an ad-hoc basis.
- Larger scale planting can provide wider areas of shade and larger habitat areas for wildlife, whilst reducing soil erosion.
- In addition, the process of maintaining the trees is made easier by having large numbers of trees grouped together in a smaller number of locations. This reduces the number of trips needed and the amount of fuel used to travel to different locations, providing economies of scale.
- There are a number of grant sources available that the Council can look to tap into to help fund the planting of trees.
- These are often linked to the involvement of the local community organisations. The grants tend to fund larger planting schemes as opposed ad hoc trees.
- It is anticipated that these types of funding opportunities are likely to remain available for the foreseeable future.
- In order to maximise the potential gains a considered approach is needed that takes account the conditions of any proposed planting site.

Proposed approach

In order to retain the landscape and community value of trees in areas of public open space, whilst ensuring that the Council benefits from strategic tree planting it is proposed that:

- Dead or removed trees continue to be replaced in a like for like manner where appropriate in public urban open spaces.
- Additional tree planting will take place on strategic tree sites only.
- These are likely to be in country park areas where there is capacity for additional areas of relatively large-scale block planting.
- At present two potential sites for strategic planting have been identified: the larger of the two is alongside Abbey Meadows Country Park with a second potential site close to Holly Hill Leisure Centre. Other potential sites will continue to be explored across the Borough.
- The overhead view on the next page identifies the one potential exemplar Strategic Tree Planting site: an area of approximately 2 hectares by the car park at Abbey Meadows.
- Any potential new strategic site would require feasibility assessments carried out to fully understand the context of the site e.g. soil conditions and any potential constraints.
- This would then allow the calculation of a proposed cost for planting at the site. This would include any enabling works required, as well as tree planting, watering, and mulching costs.
- Options for external grant funding will be explored for each potential site.
- Potential sites deemed suitable following this work would then be presented to the Executive for approval, along with the funding needed for each site.
- Each site would represent a growth area and would need to be included in the Medium-Term Financial Strategy.
- The existing countryside volunteer resource is not sufficient to help manage any new Strategic Planting sites.
- Whilst the Council will be undertaking the planting and management to begin with, over the long term they present a good opportunity to build links with community organisations.
- Working with the community will open up opportunities to apply for grant funding to provide for tree planting and may well lead to further teams of volunteers looking to help with the management of these sites.
- It will take time to build sufficient level of volunteers trained to do this.
- Streetscene will also re-evaluate their priorities to accommodate tree planting, mulching and watering wherever possible in the strategic planting areas.



- The proposed approach to tree planting will reduce expenditure by around £19,500 compared to the actual spend in 2019/20, leaving a level of spend of approximately £25,000 per year.
- Whilst replacement tree planting is likely to be undertaken by external contractors in the short-term, Streetscene will re-evaluate their priorities to see if they can accommodate replacement tree planting.

8. Adopting Land

The Council's approach to adopting land

Fareham has had a long history of adopting land that comes forward through the planning process. There are two main types of development where this occurs:

- Larger residential development sites that have areas of green space included within proposals. This approach gives the Council control over large areas of green space within the Borough, without people needing to pay any additional estate management charges
- Exceptional sites such as Coldeast or Daedalus Common that come forward rarely.

It's also important to note that there are two overall types of trees that we take responsibility for:

- Trees already onsite which are often already mature which require inspections and maintenance
- New planting such as saplings, agreed as part of the development scheme, which require additional support e.g. watering and mulching in their first few years and then eventually inspections and maintenance when mature

The Council currently applies a flat rate charge (per square metre) to adopt land irrespective of whether it contains trees or not. This rate has not been reviewed for a number of years.

Impact of the Council's current approach

Whilst there are many benefits to the Council's approach to adopting land, as the Council adopts more land, trees often come with the land as does the legal responsibilities for managing them.

The number of trees actively managed by the Council increased by 110% over a ten-year period. The number of actual trees taken on by the Council has increased by many times this amount as it is not required to actively manage many of the trees it owns. This is as a direct result of the Council adopting more land.

The annual spend for managing trees in 2019/20 was £247,492 higher than in 2011/12.

Future projections

There is significant development allocated in the Publication Version of the Local Plan with a number of large sites being proposed.

These are likely to contain considerable areas of green space and, in many instances, it is likely that they will contain large number of trees.

If the Council wishes to continue with its current approach of adopting land wherever developers are happy for the Council to do so, this will continue to add to the spending pressures arising from the management of Council owned trees.

For example, if Fareham continues to adopt trees at its current rate of approximately 700 a year (not counting Coldeast) then the annual tree maintenance and inspection costs will increase by approximately:

- £67,070 over the next 5 years
- £134,140 over the next 10 years

Considering the financial challenges faced by the Council, our current approach to adopting land and funding its maintenance, even with the other savings proposed in this report is not sustainable in the long term.

Do other Councils in Hampshire adopt all public open space?

No other Council in Hampshire adopts land as their default approach. Some adopt land in exceptional circumstances. Many either allow Parish Councils to manage such sites, or ensure arrangements are in place for private management companies to undertake the management in perpetuity.

Some of those Councils who adopt land charge a rate which reflects the costs of managing trees where necessary.

Proposed Approach

Based on the cost implications associated with adopting land it is important to consider the Council's strategic approach. The Council can:

- A) Increase service budget as tree stock increases; or
- B) Seek to recover the full costs of managing trees from developers, at the point where the Council adopts land

Option A will represent a continuing spending pressure on the Council's in respect of tree management.

Seeking to secure the future costs of managing trees at the point where land is adopted, will manage and mitigate likely future spending on the Council's tree management budget.

There may well be an increased likelihood that developers make arrangements for private estate management companies to manage public open space and trees, rather than paying the Council higher levels of contributions to adopt the land.

Policy CS20 Infrastructure and Development Contributions, of the adopted Core Strategy, states:

"Development will be required to provide or contribute towards the provision of infrastructure through planning conditions, legal agreement or directly through the service provider. Contributions or provision may also be required to mitigate the impact of development upon infrastructure. Detailed guidance on provision or contributions is or will be set out in Supplementary Planning Document(s) including any standard charges introduced through the Community Infrastructure Levy.

Provision or financial contributions will be required to include arrangements for on-going maintenance where necessary and appropriate. Phasing of development will be related to the provision of infrastructure. Consideration will be given to pooling of contributions towards the cost of facilities."

The cost the Council charges for maintaining public open space is set out within Fareham Borough Council's Planning Obligations Supplementary Planning Document for the Borough of Fareham (excluding Welborne). Within the section relating to the 'Maintenance of Open Space' (at paragraphs C.15 and C.16 of that document), it states that 'Where maintenance is secured by means of a development contribution, the amount due will be calculated using Table 7 below which will be revised as at 1 April annually in line with inflation (the Council will use the published Retail Price Index), unless otherwise justified, for example, by a greater than average rise in the costs associated with replacing children's play equipment.

At the present time the Council seeks a contribution of £6 per square metre (index linked from April 2015) for maintaining parks and amenity open space land it adopts. As a result of the detailed work that has been undertaken as part of the review of the Council's trees, it is clear that the cost of maintaining such land when it contains trees is considerably higher than the level of contribution presently secured. It is recommended that where the Council adopts land containing trees which it will be required to actively manage, a maintenance contribution of £500 (index linked from April 2021) should be secured for each tree, above the £6 per square metre (index linked). The introduction of such an increase in cost in relation to maintenance contributions is justified within Paragraph C.16 of the adopted Supplementary Planning Document.

It will also be appropriate for the Council to ensure that any trees on land being adopted by the Council, are in good order and have had any necessary works undertaken to ensure they do not present a risk to people or property, before being adopted.

9. Proposed Budget Overview

This report is based on the analysis of the actual expenditure from the baseline year of 2019/20, when the actual spend was £399,480 compared to a budget of £120,600 plus £30,000 from recharges to the Housing Revenue Account (HRA) for works carried out on Fareham Housing land.

As mentioned previously, an interim budget of £200,600 plus the £30,000 HRA recharge, was set for 2020/21 and 2021/22, pending the outcome of this review. Significant savings were made during these two years, however, certain works were curtailed or delayed, and the budget level was not seen as fully sustainable in the long term.

Potential options to reduce the level of spend that have been discussed in this paper total £137,700. However, some of these would not be available until 2022/23.

As shown in Table 4 below, the overall proposed level of expenditure including these options would be a reduction of £140,500 compared to the actual spend in 2019/20. However, the proposed approach would require an increase in budget provision of £28,400 when compared to the budget set for the last 2 years. This additional budget is an accurate reflection of the cost of managing the increased number of trees that the Council now controls.

Table 4: Comparison of Proposals to the last 2 years expenditure budget and actual spend in 2019/20

Element of Service	2019/20 – Actual Expenditure	2020/21 – Actual Expenditure	Proposed Level of Expenditure
Budget	£120,600 + £30,000 HRA	£200,600 + £30,000 HRA	£229,000 + £30,000 HRA
Planned Tree Works	£211,323	£161,059	£180,000
Good neighbour works	£71,895	£26,032	0
Tree Inspections	£45,077	£22,715	£30,000
Tree planting & young tree maintenance	£44,366	£13,991	£25,000
General e.g. software, insurance claim related works	£12,485	£6,300	£10,000
Urgent call outs	£14,333.	£22,826	£14,000
Gross Expenditure	£399,480	£252,923	£259,000
Housing Revenue Account (HRA) recharge	-£27,647	-£32,948	-£30,000
Net Expenditure	£371,833	£219,975	£229,000
Overspend	£251,233	£19,375	

The proposed maintenance contribution for adopting land with trees on would help ensure that the service remains financially sustainable as we adopt more land in the future.