



Local Validation Checklist

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Introduction

To apply for Planning Permission or Consent, you will need to submit an application.

The LPA will assess whether the information submitted meets the national and local requirements. This document sets out what those national and local requirements are for the most common planning application types.

Some information is required in order for the officer to consider your proposals, but does not form part of the nationally set out validation check list. Not having such information upfront can cause delay to the determination of the planning application. The Local Validation Checklist is designed to assist you and our officers in having as much information as reasonably possible upfront that is required in order for the expedient determination of your application. Such additional information is based on local plan or other material designations

However, we are not able to pre-empt all requirements, and some are likely to be ascertained only after consultation responses have been received or after the officer has reviewed the case. Our [pre-application service](#) will help you understand what these are likely to be, but some guidance is provided within the 'information that may be required or requested' section of this report. Please note our '[customer charter](#)' that sets out the Council's approach to accepting additional or revised plans during the processing of the planning application.

This document explains what is required to help you make a better application and for you to establish what may be required upfront, in the aim for a higher quality and more expedient planning service.

Changes since the 2021 Local Validation Checklist

BCPs Local Validation Checklist has been redeveloped to make it easier to navigate and interpret, to create greater consistency and clarity in what is required for your planning application to be validated. The trade off for this is that there is likely to be an increase in requests for information during the planning application stage, where such information could only be ascertained through consultation responses and officer knowledge. However, such instances can be avoided through use of the council's pre-application or PPA services.

The validation requirements for EIA developments, in addition to those set out in the National Requirements List, are to be determined by the determining officer. It is strongly advised that Pre-application discussions (via a Planning Performance Agreement (PPA) or otherwise) have been undertaken along with a screening and scoping assessment to achieve a more expedient validation outcome.

- Removal of the separate checklist lists
- Creation of a single interactive document
- Altered website

- Altered requirements;
 - Requirement of completion of BNG statement form for full and outline planning applications
 - Requirement to complete 'Coastal Vulnerability Assessment Template, including Geotechnical Appraisal Report Requirements' for developments within the 'Cliff instability zone'.
 - Clarity over requirements for 'redline' plans
 - Explicit requirement for draft UU and payment of S106 upfront for all residential schemes, unless declaration signed acknowledging scheme refusal.
 - If Affordable housing required but argued to be non-viable, DVS fee to be paid upfront, unless signed acknowledging scheme refusal.
 - Bespoke validation requirements for EIA development, determined by the determining officer.
 - No longer accepting paper copies of planning application submissions.
 - Introduction of fees.
 - Nutrient neutrality – if within relevant catchment require submission of statement and relevant calculator

Validation Matrix

The validation matrix is a visual tool to help applicants understand what is required to determine their planning application.

The visual version is in Appendix 1, and can be downloaded [here](#).

Pre-application Service

The local planning authority offers a chargeable pre-application advice service which applicants are encouraged to use before applying for planning permission. Details of how to make an enquiry and can be found on our website:

<https://www.bcpco uncil.gov.uk/Planning-and-building-control/Apply-for-planningpermission/Pre-application-advice/Pre-application-advice.aspx> The guidance document includes details of fees and what to submit:

<https://www.bcpco uncil.gov.uk/Planning-and-building-control/Apply-for-planningpermission/Pre-applicationadvice/Docs/pre-app-guidance-notes-final-version.pdf>

National and Local Requirements

The list below contains details of the national and Local requirements for the validation of planning applications at BCP. The National Requirements can be viewed [here](#) [Making an application - GOV.UK](#).

General requirements

Application forms and fees

Application form

This can be completed on-line using the Planning Portal
www.planningportal.co.uk/apply

PDFs can be downloaded from the Planning Portal
www.planningportal.co.uk/info/200126/applications/61/paper_forms or obtained from our Customer Contact Centre. These can be emailed to planning@bcp council.gov.uk. Please note that there may be a fee for the submission of applications by email.

The Council are no longer accepting paper copies of planning applications e.g. that have been posted to the council or handed in.

Ownership and Agricultural Land Certificates

Where included on the application form ownership certificates A, B, C or D must be completed. The 'owner' is anyone with a freehold interest or a leasehold interest where the lease is 7 years or longer.

A notice to all owners must be completed and served in accordance with.

- Certificate A should only be signed where the applicant and the owner are the same individual or organisation.
- Certificate B should be completed and notice served on all owners in all instances where the applicant is not the only owner of land or does not own the site. It is not sufficient to only inform the management company. **This includes flats.**
- Certificate C should be completed if the applicant does not own all of the land to which the application relates and does not know the name and address of all of the owners and/or agricultural tenants. Notice 1 must be completed and sent to all known owners and/or agricultural tenants. Where the owners or agricultural tenants are unknown, Notice 2 must be published in a local newspaper.
- Certificate D should be completed if the applicant does not own all of the land to which the application relates and does not know the names and addresses of any of the owners and/or agricultural tenants. Notice 2 must be published in a local newspaper. A copy of the notice should be sent with the application to the local authority.

This includes a requirement to serve notice on the husband/wife/partner if land is jointly owned but only one of them completes the application.

It also includes a requirement to serve notice where the applicant is an individual and a company owns the land (regardless of whether the applicant is the sole director) or where the applicant is a company to serve notice on all the directors of that company. If the proposed extension or building will be attached to a neighbouring property, and either the foundation, wall or roof over sails the boundary or butts up to the boundary then you will need to serve notice on the owner of the neighbouring land. This is likely to be the case if the application is for a terraced or semi-detached property. Where Certificate C or Certificate D is completed because notice cannot be served on all the owners, the local newspaper that you will need to publish a notice in within 21 days of the date of application is the Bournemouth Echo. Notice must also be served on any agricultural tenants. Applicants must certify that they have notified any agricultural tenants about their application, or that there are no agricultural tenants on the site. This certificate is required whether or not the site is an agricultural holding and is now combined with the ownership certificates on the standard application form where it applies.

Further information about ownership certificates can be found in the government's published Planning Practice Guidance (PPG): [Making an application - GOV.UK](#)

Fees

The correct fee must be paid when the application is submitted.

The Planning Portal website includes a fee calculator [Planning Portal](#)

If an application is submitted via the Planning Portal website the fee payment must be made to the Planning Portal, including their administrative fee.

Fees can only be paid directly to the local authority if the application is emailed directly to us. There may be a local fee to cover the cost of processing the application. A fee may also be applied if your application is found to be invalid, to cover the cost of seeking the required documentation. In such instances the invalidity fee must be paid before the application can be made valid. The application cannot be validated without payment of such fees.

CIL Forms

For proposals that are for CIL liable developments, a **CIL Additional Information Requirement Form** will need to be completed for any applications which are CIL liable. BCP only charges CIL for new dwellings.

[cil_questions.pdf](#)

Plans

All plans and documents must be submitted in PDF format. Photos or other formats cannot be accepted. The exception is the BNG Metrics that must be submitted as a excel document.

Location Plans

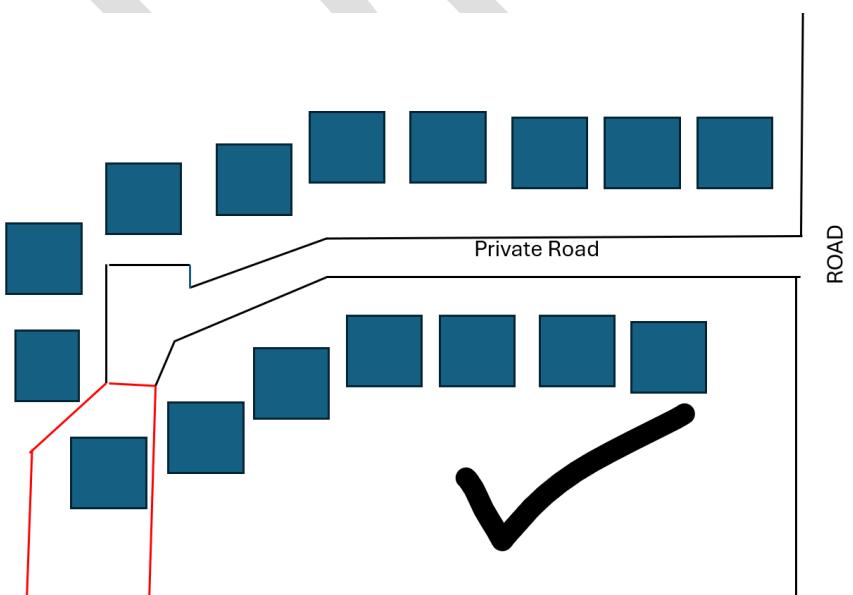
Scale: Must be of a scale of 1:1250 (scaled to fit A4 or A3 paper) with a scale bar, north pointer and showing a minimum of **two named roads and surrounding buildings.**

Redline: The application site (to which your proposal relates) should be edged clearly with continuous a red line.

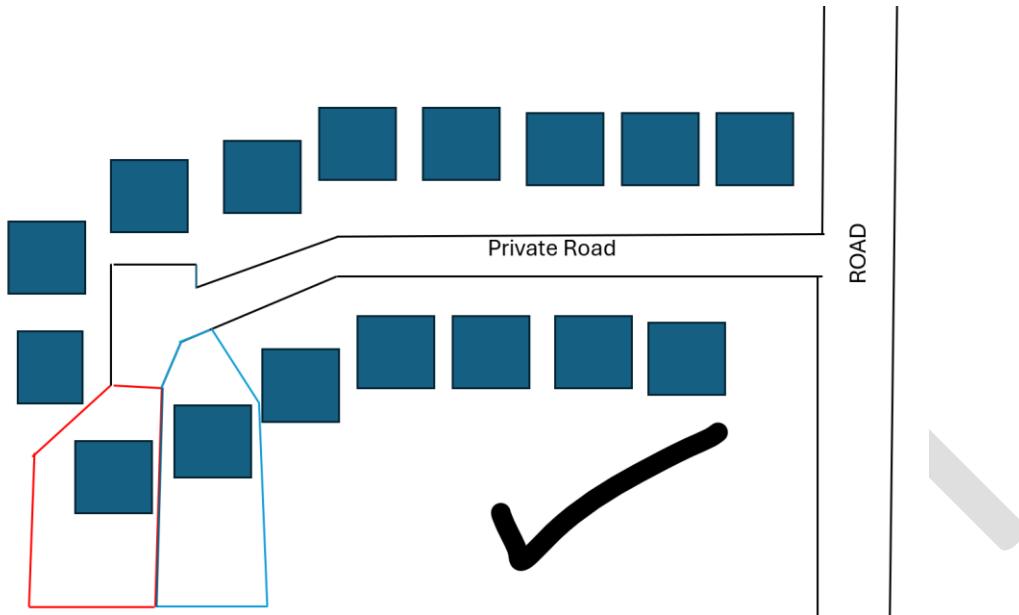
Your red line boundary should include the entire proposal site, i.e., land required for access to the site, car parking, gardens, and other outbuildings around the site, such as garages.

For all applications, whether for residential, rural, or commercial developments, it is vital to show the site's access to roads that link to the public highway and that this is included on the plan itself.

The redline can abut the pavement rather than the road, unless the development proposals require work to the pavement – e.g. a dropped curb. In those cases the redline must include the pavement to the highway.



Blue Line: A blue line should be drawn around any other land owned or controlled by the applicant, close to or adjoining the application site.



Where to purchase: Location plans can be purchased from one of the Planning Portal's accredited suppliers:

www.planningportal.co.uk/homepage/4/buy_a_planning_map

Format: All plans and documents must be submitted in PDF format.

Copyright: We will not accept plan plans submitted that do not comply with copyright law. For example, Land Registry plans or unlicensed Ordnance Survey maps will not be accepted as site location plans, and your application will be made invalid if such is submitted.

Block Plan/Site Plan

Scale and orientation: Must be a Scale 1:500 or 1:200 accurately showing:

- The direction of North
- The proposed development in relation to the site boundaries and other existing buildings on the site, with written dimensions to the boundaries
- An accurate and annotated scale bar

Details to include where relevant:

- All the buildings, roads and footpaths on land adjoining the site including access arrangements

- e) All public rights of way crossing or adjoining the site
- f) The position of all trees on the site, and those on adjacent land
- g) The extent and type of any hard surfacing
- h) Boundary treatment including walls or fencing where this is proposed

Purchase: Block plans can be purchased from one of the Planning Portal's accredited suppliers: www.planningportal.co.uk/homepage/4/buy_a_planning_map
Please ensure that any plans submitted comply with copyright law.

Existing and Proposed Elevations and floor plans

Required so that officers can clearly see changes.

For all application types (excluding householder) must be scaled (1:100 or 1:50)

For Householders and householder related Lawful Development Certificate (LDC) applications, these can be drawn by hand but must be a reasonable likeness AND include dimensions.

Format: All plans and documents must be submitted in PDF format.

Ground levels, existing and proposed (as datum points)

Where excavation is proposed (beyond that required for foundations). These must include datum points where ground levels are shown.

Format: All plans and documents must be submitted in PDF format.

Section Plans

Provided for schemes including swimming pools. These must be dimensioned (1:50 or 1:100). Where ground levels around the pool are to be changed, then a levels plan must be included.

Format: All plans and documents must be submitted in PDF format.

Existing and proposed car parking plan

Required if the proposal will alter or change the car parking and access arrangements e.g. create or alter vehicle and/or pedestrian access; widen visibility splays; add or alter parking spaces. These must be scaled (1:50 or 1:100).

Format: All plans and documents must be submitted in PDF format.

Roof Plans

If any roof would be created or altered by the proposal. These must be scaled (1:50 or 1:100).

Format: All plans and documents must be submitted in PDF format.

BNG

Unless exempt, developers in England are required to provide 10% BNG on all habitats within the redline boundary of their development, whether or not they are impacted. [Separate arrangements apply to on-site irreplaceable habitat.](#)

For off-site gains and significant on-site gains, you must maintain the habitats you create or enhance for a minimum of 30 years. The responsibilities will be set out in a [legal agreement](#).

Biodiversity Net Gain Statement

Required to be completed and signed for **all** applications, with the exemption of Householder Applications, Prior Approvals, Certificate of Lawful Developments. This is to assist officers in the assessment of BNG.

link to document here - and in Appendix 2.

Format: All plans and documents must be submitted in PDF format.

Biodiversity Metric

The [statutory \(official\) biodiversity metric calculation tool](#) must be used in order to demonstrate that you have calculated the number of biodiversity units for existing habitat or habitat enhancements in accordance with the statutory biodiversity metric.

If your development has to meet [mandatory biodiversity net gain \(BNG\) requirements](#), it will need to use the metric tool.

The requirement to use the biodiversity metric will take effect at different times, depending on the size of the development. The relevant metric tool should be used for:

- major developments
- small developments
- nationally significant infrastructure projects from May 2026

You can choose to use a simpler version of the metric tool, called the [small sites metric](#) (SSM) if your development meets the criteria to do so.

Except for small developments using the SSM, a developer or land manager should hire a competent person such as an ecologist to use the metric tool and advise on the metric tool's calculations. The local planning authority (LPA) will review submitted calculations and may reject them if they do not believe they have been completed by a competent person.

An ecologist can enter information into the metric tool about the existing habitat and any planned development or enhancement. The metric will calculate the biodiversity value of the habitat, and how a development, or a change in land management, will

change the biodiversity value. For example, the metric can measure the impact of building houses, planting a woodland or sowing a wildflower meadow.

Early and repeated use of the metric tool can help:

- assess a site to find the number of biodiversity units an existing habitat has – its biodiversity value
- compare BNG proposals for a site - such as [creating or enhancing habitat, on-site or off-site](#)
- plan habitat management decisions that promote biodiversity

For more information, please visit - [Calculate biodiversity value with the statutory biodiversity metric - GOV.UK](#)

Habitat Management and Monitoring Plan (HMMP)

A draft Habitat Management and Monitoring Plan should be submitted with non-BNG exempt proposals.

There's a set of [HMMP tools](#) including templates, a checklist and companion guides, to help you write your HMMP.

The HMMP template is a guide with a structure to help you show details of your project. You do not need to fill in every section as not all of it will be relevant to you. It's suitable for significant on-site enhancements and for off-site gains.

The template's companion document lists habitat condition and assessment criteria.

There is a separate template and habitat guide for [small developments](#).

For further information, please see - [Creating a habitat management and monitoring plan for BNG - GOV.UK](#)

Design and Access Statement

A Design and Access Statement is a concise report accompanying certain applications for planning permission and applications for listed building consent.

Further details of what the design and access should contain are provided [here](#)

A Design and Access Statement is required for the below applications;

- Major Planning Applications
- Applications in a Conservation Area AND
 - 1 or more dwellings
 - Building(s) with a floor space of 100sqm or more
- Applications for Listed Building Consent

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Application type specific requirements

Residential developments

Affordable Housing Statement

When Required: Where 10 or more new or additional units of residential accommodation will be created or where 9 or less units are proposed and the site area is 0.5 hectares or more.

This form must state:

- Whether or not the scheme would provide affordable housing
- On site or as a contribution
- Mix
- Tenure

Draft S106: The Submitted UU request must also include provision of AH.

Affordable Housing viability assessment plus payment of external assessor fee

When required:

Where 10 or more new or additional units of residential accommodation will be created or where 9 or less units are proposed and the site area is 0.5 hectares or more.

Where it is stated in the **Affordable Housing Statement** that the scheme cannot viably provide affordable housing then the submission must be accompanied by a

- Affordable Housing Viability Assessment.
- Payment of the initial appropriate fee for independent external assessment.

If the applicant does not want the Affordable Housing Viability Assessment to be independently assessed and/or does not want to pay the fee, **then the applicant will be required to state in their Affordable Housing Statement that they understand that the proposal would not accord with development plan policies in that regard and is likely to be considered unfavourably.**

Developments Requiring Environmental Impact Assessment (EIA)

Environment Statement

When Required

Will be required for all developments falling within Part 1 or Part 2 of the EIA Regulations.

Minerals & Waste Developments

Planning Statement

Whilst this is only a validation requirement for Mineral and Waste schemes, they are a helpful tool for officers in the assessment of planning applications more generally.

A planning statement can provide an overview and explanation of a proposal. It can include an assessment of how the proposed development accords with relevant national and local planning policies

Land registry Documents

A Land Registry Official Copy of the Register of Title to the Land and Title Plan. These must be dated within the last 3 months. Please note that if you are supplying a Schedule of Leases you will need to ensure that copies of the Register of Title to the Land and Title Plan are supplied for each lease. Please ensure that this information corresponds with the ownership certificates on the application form before submitting the application.

A Search of Index Map (SIM) for application sites that have complex titles e.g. leaseholds, more than one freehold title, if it is unclear whether the red line goes over any other land etc. This provides a detailed list of all titles included in the red line site plan and therefore all titles that will need to be included in the section 106 agreement. The SIM search needs to be conducted against the red line plan and not the title plan. This can be done at the land registry online www.gov.uk/get-information-about-property-and-land/search-the-index-map for a small charge (which includes up to 5 titles). We will accept proof that you have requested the SIM search from the land registry (a copy of the application that you have made to the land registry) and allow the results of the search to be submitted to us within the next 14 days.

If the land required for the proposal is not registered with the Land Registry the onus is on the applicant to prove ownership/title and a Certificate of Title from a Solicitor will be required instead of Land Registry documents. We would accept a solicitor's letter of undertaking on their letterhead in the form of a one page document, headed Certificate of Title, signed by the solicitor stating their qualifications and dated.

On the Certificate, it must show:

- who owns the property
- whether there are any leaseholders, and
- confirmation of any legal charges and mortgagees on the land.

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Policy map specific requirements

To understand whether your proposal falls within the below zones, please use the mapping - [Aurora](#)

Energy and Resource Statement (Poole residential and commercial developments)

For applications that fall to be considered under the Poole Local Plan all proposals for the creation of new dwellings or 1000m² of non-commercial floor space.

Elsewhere if the proposal is for 10 or more dwellings or 1000m² of non-residential floor area.

This document should demonstrate how the proposal complies with the requirements of Policy PP37 of the Poole Local Plan, and notably, set out how the proposals would incorporate a proportion of future energy use from renewable energy sources. This proportion is a;

- Minimum of 10% for proposals of 1-10 homes (net) or under 1,000 sq. m (net) commercial floor space; and
- a minimum of 20% for proposals of 11 or more homes or over 1,000 sq. m commercial floor space.

Such renewable energy source, if constituting development, must be included on the plans.

A BREEAM pre-assessment should accompany the Energy and Resource Statement for **non-residential schemes**. This is not required for residential schemes.

Nutrient Neutrality Catchment Area (Phosphates and Nitrates)

Development located within the catchment of the [River Avon](#) or the [Poole Harbour catchment](#) and proposes additional overnight accommodation will need to mitigate the impact of such development.

Under Habitats Regulations, before giving permission, the Council must be satisfied that proposed development will not adversely affect the integrity of the habitats site because of in a net increase in nitrogen and/or phosphorus entering catchment areas. This includes planning applications at the reserved matters approval stage of the planning application process, technical details consent and discharge of pre commencement conditions. Natural England have defined catchment areas in the area around the following internationally designated habitats.

The types of additional development which may result in additional nitrogen and/or phosphorus and a decline in condition are all types of overnight accommodation which includes:

- a net gain in residential units;
- residential institutions, including student accommodation, boarding schools residential colleagues and training centres;
- tourism accommodation including overnight tourist accommodation, including self-service and serviced tourist accommodation such as hotels, guest houses, bed and breakfasts, self-catering accommodation including holiday chalets and static caravan sites, caravan and touring holiday accommodation, camping/glamping sites, yurts, shepherds hut, and 'pop' up or temporary camp sites;
- specialist housing e.g. care homes and retirement homes;
- commercial or industrial developments that include overnight accommodation;
- employment sites where employees will be hosted from outside of the catchment, and/or the development includes overnight accommodation.

Other types of business or commercial development, not involving overnight accommodation, will generally not need to be included in the assessment unless they have other (non-sewerage) water quality implications. Whilst nutrient neutrality is only currently being applied to development that would result in a net increase in population served by a wastewater system, the Habitats Regulations requirements will apply to any plans or projects, including agricultural or industrial plans and projects that have the potential to release additional nitrogen and/or phosphorus into the system.

Further information regarding mitigation, including how to purchase credits, within the [Poole Harbour catchment](#) and [River Avon Catchment](#) are available on the Council's website.

Requirements of the Nutrient Neutrality Statement

The Nutrient Neutrality Statement should include;

- details of arrangements for managing wastewater and surface water arising from the development;
- a nutrient budget calculation for nitrogen made using the Natural England nutrient calculator for Poole Harbour ([the latest calculator is currently May 2024](#)); and
- details (including how this mitigation will be delivered and secured in perpetuity) of the mitigation proposed to offset nutrient loading.

The Nutrient budget calculator

Developers must use nutrient budget calculations to show that their proposals will not bring about a net increase in nutrient pollution to specific habitats sites. Some

local planning authorities also have their own nutrient neutrality calculators which can be used.

The nutrient neutrality calculators are for:

- developers who need to complete a nutrient budget calculation to support a planning application
- local planning authorities who need to understand the mitigation requirements for future development or to assess planning applications

Details of how to complete the calculators and the calculators themselves, can be found online, via the below links;

- [River Avon SAC](#)
- [Poole Harbour](#)

Flood Risk Assessment (FRA)

When required

If the site is in the;

- Environment Agency's Flood Zone 1 and over 1 ha, or in Flood Zones 2 or 3 and/or
- Located within the future flood risk zones ([LINK](#)).

Details of what is required within a flood risk assessment are provided [here](#)

Any FRA should clearly demonstrate mitigation measures and link to drainage strategy where appropriate.

Flooding Sequential Test

The Sequential Test is required for all sites in Flood Zones 2 & 3, except where:

- is a householder development like residential extensions, conservatories or loft conversions
- is a small non-domestic extensions with a footprint of less than 250 square metres
- is a change of use (except changes of use to a caravan, camping or chalet site, or to a mobile home or park home site)
- is laid out so that only elements such as public open space, biodiversity and amenity areas are located in areas at risk of any source of current or future flooding
- is solely at risk from surface water flooding and a site-specific FRA demonstrates it will be safe throughout its lifetime, without increasing flood risk elsewhere – this exemption does not apply to sources of flooding other than surface water
- is a development on a site allocated in the development plan through the sequential test, and:
 - the proposal is consistent with site's allocated use; and

- there have been no significant changes to the known level of flood risk to the site, now or in the future, which would have affected the outcome of the test

Sequential Tests for Main Town Centre Uses

Local planning authorities should apply a sequential test to planning applications for main town centre uses which are located outside of an existing centre. Main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered.

Main town centre uses comprise - Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development.

Main Town Centre use impact assessment

If the proposal is for a main town centre use outside of the Town Centre use over 2,500m² of gross floorspace, an Impact assessment is required. This should include assessment of:

- (a) the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- (b) the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).

Main Town Centre uses comprise: Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

Heritage Statement

For any proposal affecting a listed building, conservation area, registered park and garden, locally listed building, scheduled monument or archaeological site, Historic

park and gardens, regardless of the type of application (i.e. householder, advertisement, outline, full planning)

Tree Survey/ Arboricultural Impact Assessment/ Method Statement

If any tree is within falling distance of any proposed work; if there is a Tree Preservation Order (TPO); or the application site is within a Conservation Area. An Arboricultural Method Statement (AMS) that follows the guidance set out in sections 6 and 7 of BS5837:2012 Trees in relation to design, demolition and construction – Recommendations is required.

The Arboricultural Method Statement will include all measures considered necessary at the application stage to ensure that trees to be retained are fully protected from demolition (if applicable) to completion of development, including landscaping. This

Coastal Vulnerability Zone (CVZ), Coastal Change Management Area, Cliff and Chine Stability Consultation Zone

Proposals within these above zones must be supported with a Coastal Vulnerability Assessment. This comprises and form (see [Section 5.4 & Appendix A](#) -) which must be completed and signed.

If a proposed development is also within a flood risk area, then a Flood Risk Assessment (FRA) will also need to be completed alongside a CVA (see **Section 4.4**)

The purpose of a CVA is to enable a risk-based approach to be taken to development within the coastal zone, and will ensure that the applicant has considered the relevant planning policies in relation to flood and coastal change risks as set-out in the BCP Local Plan and expanded upon in this document, such that the applicant:

- Is aware of and understands the relevant policies and management approach associated with the coastal risks in relation to the proposed development site.
- Demonstrates that the proposed development (including any new and/or servicing infrastructure) will not increase the risk of coastal change elsewhere, for example by increasing surface water run-off and groundwater levels that can lead to cliff instability.
- Demonstrates that the development (including any new and/or servicing infrastructure) will not conflict with the future coastal risk management approach of the wider area and/or adjacent sections of coast.
- Has considered how the development (including any new and/or servicing infrastructure) will be managed at the end of its lifetime*, including measures for the removal or relocation of the development before the site is threatened by coastal change.

- That decisions on investment in the development are made with a full understanding of the risks and uncertainties

Further information can be found within the [Flooding and Coastal Change Background paper](#)

Other documents that may be requested during determination of the application

Aerodrome Safeguarding Assessment

If the proposal will exceed the various height limitations within the aerodrome safeguarding zones; has potential to increase the bird hazard risk; lighting that has the potential to distract pilots, buildings, structures, erections of works which would infringe protected surface, obscure runway approach lights or have the potential to impair the performance or airport navigation aids, radio aids or telecommunication systems. The assessment should include:

- details regarding the elevation of the site to an accuracy of 0.25 metres AOD (Above Ordnance Survey Datum);
- landscaping details to enable assessment of likely bird attraction; and
- materials proposed for assessment of potential radar reflection.

Further information: www.gov.uk/government/publications/safeguarding-aerodromes-technical-sites-and-military-explosives-storage-area

Air Quality Assessment

If the proposal is likely to generate high levels of air pollution or is inside or adjacent to an Air Quality Management Area (AQMA).

Badger, Bat or Barn Owl Survey

If the proposed development includes the following: Does the application include any building, or structure in any locality:

- with an existing Dorset Environmental Records Centre (DERC) badger, bat roost, or barn owl record?
- where the presence of either badgers, roosting bats or barn owls have been reported on site by the applicant, or a third party?

Bat and Barn Owl Surveys are also required where the development includes the following:

- Any building, or structure over 5 years old:
- with an enclosed roof space, or cellar, or similar feature, or agricultural barn in a rural, or village, locality.
- Or any building, or structure over 5 years old:
- with an enclosed roof space, or cellar, or similar feature in a, town, or urban locality, that is located immediately adjacent to protected wildlife sites (e.g. SSSI, SNCI), woodlands, parks, watercourses, railway embankments, large areas of rough grassland / scrub,

agricultural fields, large cemetery, golf course, or similar areas of green infrastructure. Where the application includes either the:

- Demolition of any building, or structure with an enclosed unconverted roof space, or cellar, or similar structure.
- Conversion of an attic space or barn / outbuildings (includes dormer window installation), or conversion of cellar.
- Extensions that tie into an existing enclosed roof space.
- Renovation of derelict building (structures with intact roofs, or cellars).

Cycle Store details

Where the proposal includes cycle stores drawings showing the location, floor layout and elevations of the proposed cycle storage must be submitted, and details of materials to be used in the construction included on the application form. Cycle stores should be designed and sited to minimise their impact and either incorporated internally as part of the building or sited behind the building line.

Drainage/SUDS

If the proposal is for a new building, to increase the footprint of an existing building and/or the development of car parking and/or any other hard standing/impermeable surface. The information submitted should include:

- Details of the sustainable urban drainage system, for example, the soakaway system to be used and the draining points and channels to be shown on the application plans/drawings
- A statement giving details of the proposed provision for maintenance Please note that any soakaway system will need to be at least 5 metres away from the building. Where development is within 200m of the cliffs proposals should be discussed with Wessex Water before making the application as soakaways will not be suitable and details of a drainage system will need to be submitted with any planning application.

Soakaways are specifically banned along the cliff top because they put all the rain water that was previously evenly distributed across the site, into the ground at a point but that does not necessarily mean that other forms of SUDS will be acceptable. If the proposal is for new buildings, and/or to increase the footprint of an existing building, and/or the development of car parking and/or any other hard standing/impermeable surface, details of drainage systems should be indicated on any plans and drawings.

Geotechnical report

Details of what is expected to be included within a Geotechnical Appraisal Report can be found on page 65 (Annex A1) of [TCC9 FCERM Background Paper June 2024](#)

Lighting Assessment

For major developments; or schemes involving the provision of floodlighting; or where the lighting from the proposal would result in a material impact.

Minerals Assessment

Where prior abstraction is required.

Noise Impact Assessment

Where the development would raise issues of disturbance by noise to the occupants of nearby residential buildings, and for developments that are noise sensitive

Planning Statement

A planning statement can provide an overview and explanation of a proposal. It can include an assessment of how the proposed development accords with relevant national, local and Neighbourhood Plan planning policies.

Retail Impact Assessment

If the development proposal could harm the vitality and viability of existing shopping centres e.g. town centres

Refuse disposal and details of Bin Stores

Where bin stores are required, details of the location, elevations and materials to be used in the construction of a bin store suitable for housing wheeled or euro bins shall be submitted as part of the application. Bin stores should be designed and sited to minimise their impact and wherever possible be incorporated internally as part of the building or sited behind the building line.

Tourism Viability Report

Where development relates to the loss of tourist accommodation, or the loss or change of use of a tourist or cultural facility. For the loss of a site or premises used, or last used, as tourist accommodation the report will need to include evidence to demonstrate that the:

- business is no longer viable and has no reasonable prospect of continuing; and the
- loss of the tourist accommodation will not harm the function of the area in relation to the tourism industry and the local community. For the loss of a site or premises used or last used, as a tourist or cultural facility the report will need to include evidence to demonstrate that:
 - the current use is no longer viable;
 - there is no reasonable prospect of the use continuing; and
 - It has been actively marketed with a guide price reflecting its market value for a period of 12 months. For the change of use of a site or premises used or

last used, as a tourist or cultural facility the report will need to explain how the new use will maintain:

- the function of the area in relation to the tourism industry and the local community; and
- the character and appearance of the area

In addition, policies in the [Sandbanks Peninsula NP](#) (*Sand10: Existing hotels*) requires additional information where services within a hotel are lost

Transport Statement and assessments

When required

Transport Assessments and Statements are all ways of assessing and mitigating the negative transport impacts of development in order to promote sustainable development. They are required for all developments which generate significant amounts of movements.

What is required

Transport Statements should accord with the requirements set out by the PPG. [Travel Plans, Transport Assessments and Statements - GOV.UK](#)

Transport Assessments are thorough assessments of the transport implications of development, and Transport Statements are a ‘lighter-touch’ evaluation to be used where this would be more proportionate to the potential impact of the development (ie in the case of developments with anticipated limited transport impacts).

Transport Assessments and Transport Statements primarily focus on evaluating the potential transport impacts of a development proposal. (They may consider those impacts net of any reductions likely to arise from the implementation of a Travel Plan, though producing a Travel Plan is not always required.) The Transport Assessment or Transport Statement may propose mitigation measures where these are necessary to avoid unacceptable or “severe” impacts. Travel Plans can play an effective role in taking forward those mitigation measures which relate to on-going occupation and operation of the development.

Transport Assessments and Statements can be used to establish whether the residual transport impacts of a proposed development are likely to be “severe”, which may be a reason for refusal, in accordance with the National Planning Policy Framework.

Such statements should accord with ATE Guidance - [Active Travel England Standing Advice Note: Active travel and sustainable development](#)

Travel Plan

When are they required

Travel Plans are all ways of assessing and mitigating the negative transport impacts of development in order to promote sustainable development. They are required for all developments which generate significant amounts of movements.

What do they need to include?

The primary purpose of a Travel Plan is to identify opportunities for the effective promotion and delivery of sustainable transport initiatives eg walking, cycling, public transport and tele-commuting, in connection with both proposed and existing developments and through this to thereby reduce the demand for travel by less sustainable modes. As noted above, though, they should not be used as way of unfairly penalising drivers.

Travel Plan

For development that may have significant impacts on the transport network. The Travel Plan should outline the way in which the transport implications of the development are going to be managed in order to ensure the minimum environmental, social and economic impacts. Further advice is available in the Communities and Local Government publication 'Good Practice Guidelines: Delivering Travel Plans through the Planning Process 2009'.

Ventilation/ Extraction Statement

Where the development is likely to require ventilation or extraction full details of the position and design of ventilation and extraction equipment should accompany the application and be included on plans/drawings. Where the equipment is included on the application drawings, enclosing a copy of the manufacturer's specification with the application will usually provide sufficient technical detail. All applications for hot-food take-aways, bars/pubs, restaurant uses and launderettes etc. will need to include this information. Details will also be required for retail, business, industrial, leisure or other developments where substantial ventilation/extraction equipment is proposed to be installed.

APPENDIX 1: Matrix

(inserted as a A3 PDF)

DRAFT

Appendix 2: Validation Check List in List Form

Householder

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50 OR dimensioned)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Parking plan (if changes in parking arrangements) (1:100 or 1:50 OR dimensioned)
- Roof plans (existing and proposed) (1:100 or 1:50 OR dimensioned))
- Correct Fee

If within relevant Mapped Zone;

- Flood Risk Assessment (proportionate to the scale of the development) if located within Flood Zone 2, 3 and/or future flood risk zones
- Heritage Statement i(proportionate to the scale of the development) if adjacent to Conservation Area or Listed Building.
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / if the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Householder and Listed Building Consent

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50 OR dimensioned)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Parking plan (if changes in parking arrangements) (1:100 or 1:50 OR dimensioned)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Heritage Statement

If within relevant Mapped Zone;

- Heritage Statement (proportionate to the scale of the development) if adjacent to Conservation Area or Listed Building.
- Flood Risk Assessment (proportionate to the scale of the development) if located within Flood Zone 2, 3 and/or future flood risk zones
- Heritage Statement if adjacent to Conservation Area or Listed Building.

- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / if the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Application for Planning Permission

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

If in mapped zone

- If in Flood Zone 2/3 and / or the future flood risk zone. - Flood Risk Assessment
- If adjacent to a Conservation Area or Listed Building, within a Conservation Area - Heritage Statement
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / whether the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Based on Development Type

- If the proposal is within Nitrate/ Phosphate Neutrality area and proposes any overnight accommodation – submission of up to date completed relevant nutrient neutrality calculator.
- If the proposal is for 10 or more dwellings - Affordable housing statement
- If the proposal is for 10 or more residential units, and is arguing that the scheme cannot provide a policy compliant level of affordable housing - Affordable housing viability statement, plus payment of assessor fee
- For proposals resulting in a net gain in dwellings
 - Draft S106/S111
 - land registry documents
 - agreement to pay legal fees

Application for Planning and Listed Building Consent.

- Application form

- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Heritage Statement
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

If in mapped zone

- If in Flood Zone 2/3 and / or the future flood risk zone. - Flood Risk Assessment
- If adjacent to a Conservation Area or Listed Building, within a Conservation Area - Heritage Statement
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / whether the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Based on Development Type

- If the proposal is within Nitrate/ Phosphate Neutrality area and proposes any overnight accommodation – submission of up to date completed relevant nutrient neutrality calculator.
- If the proposal is for 10 or more dwellings - Affordable housing statement
- If the proposal is for 10 or more residential units, and is arguing that the scheme cannot provide a policy compliant level of affordable housing - Affordable housing viability statement, plus payment of assessor fee
- For proposals resulting in a net gain in dwellings
 - Draft S106/S111
 - land registry documents
 - agreement to pay legal fees

Application for Listed Building Consent.

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and sections (existing and proposed) (1:100 or 1:50) (if excavation e.g. pools are proposed)

- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Heritage Statement

Application for Planning Permission and consent to display an advertisement

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

If in mapped zone

- If in Flood Zone 2/3 and / or the future flood risk zone. - Flood Risk Assessment
- If adjacent to a Conservation Area or Listed Building, within a Conservation Area - Heritage Statement
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / whether the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Based on Development Type

- If the proposal is within Nitrate/ Phosphate Neutrality area and proposes any overnight accommodation – submission of up to date completed relevant nutrient neutrality calculator.
- If the proposal is for 10 or more dwellings - Affordable housing statement
- If the proposal is for 10 or more residential units, and is arguing that the scheme cannot provide a policy compliant level of affordable housing - Affordable housing viability statement, plus payment of assessor fee
- For proposals resulting in a net gain in dwellings
 - Draft S106/S111
 - land registry documents

- agreement to pay legal fees

Application to display an advert

- Application form
- Ownership Certificates
- Location Plan/ Block Plan
- Site Plan
- Existing and proposed elevations and floor plans
- Car parking plan (existing and proposed) (if proposal would be located within the parking area or access).
- Other plans and drawings// photographs to support application
- Heritage Statement if within a Conservation Area or within setting of a Listed Building.
- Correct fee

Outline Planning Permission

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

If in mapped zone

- If in Flood Zone 2/3 and / or the future flood risk zone. - Flood Risk Assessment
- If adjacent to a Conservation Area or Listed Building, within a Conservation Area - Heritage Statement
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / whether the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Based on Development Type

- If the proposal is within Nitrate/ Phosphate Neutrality area and proposes any overnight accommodation – submission of up to date completed relevant nutrient neutrality calculator.
- If the proposal is for 10 or more dwellings - Affordable housing statement

- If the proposal is for 10 or more residential units, and is arguing that the scheme cannot provide a policy compliant level of affordable housing - Affordable housing viability statement, plus payment of assessor fee
- For proposals resulting in a net gain in dwellings
 - Draft S106/S111
 - land registry documents
 - agreement to pay legal fees

Certificate of Lawful Development (Proposed)

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Other Plans and drawings/ photographs to support application.
- Payment of correct fee

Certificate of Lawful Development (Existing)

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Other Plans and drawings/ photographs to support application.
- Payment of correct fee

Approval of details reserved by condition

- Application form
- Ownership Certificates
- Other Plans and drawings/ photographs to support application.
- Payment of correct fee

S.73 – removal or variation of condition following grant of planning permission.

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee

- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- If the changing change approved Biodiversity Gain;
 - Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

Non-material amendment

- Application form
- Ownership Certificates
- Other plans, documents, and drawings/ photographs to support the varied condition.
- Payment of correct fee

Prior Approval Applications

See individual application forms and the relevant Class in the Town and Country Planning (General Permitted Development) (England) Order 2015 (as amended) for the requirements to be submitted within each specific prior notification.

Minerals and Waste applications

Please see national Guidance.

Proposals accompanied by an Environmental Statement

Validation requirements are bespoke for these developments.

Forms

Coastal Vulnerability Assessment Template, including Geotechnical Appraisal Report Requirements

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Appendix A Coastal Vulnerability Assessment Template, including Geotechnical Appraisal Report Requirements

1. Applicant's name:

.....

2. Agent's name (if applicable):

.....

3. Development proposal title:

.....

4. Development location / address:

.....

5. Pre-application details (if applicable):

.....

6. Which Shoreline Management Plan policy unit(s) cover the development frontage?

.....

7. Which FCERM Strategy covers the development frontage?

Poole Bay, Poole Harbour & Wareham FCERM Strategy	Yes / No
Christchurch Bay & Harbour FCERM Strategy	Yes / No

8. Which FCERM Strategy unit(s) cover the development frontage?

.....

9. Which BCP Sea Cliff and Chine Asset Unit(s) does the development cover?

.....

10. Which risk zone(s) does the development sit within (select "Yes" for all that apply):

Coastal Change Management Area (CCMA)	Yes / No
Coastal Vulnerability Zone (CVZ)	Yes / No
Cliff and Chine Stability Consultation Zone	Yes / No
Flood Zone <i>(if yes, please also complete a separate Flood Risk Assessment)</i>	Yes / No

11. Development category (select "Yes" for all that apply if mixed development):

New residential development	Yes / No
New non-residential development	Yes / No
Extension to existing development	Yes / No
Modification to existing development	Yes / No
Temporary buildings, caravans and land uses	Yes / No
Temporary beach pop-up or similar short term seafront installations <i>(If yes, please also refer to the BCP FCERM Guidance for Beach Pop-Ups and other Temporary Seafront Installations – Appendix B of the “Flooding & Coastal Change in BCP” document)</i>	Yes / No
Infrastructure	Yes / No
Other (please state):	Yes / No

Please provide detailed answers (with supporting evidence as appropriate) to the following:

12. What is the nature and the scale of the proposed development?

.....

13. What impact will the location of the development have for other properties in the adjacent area?

.....

14. Provide details of the predicted shoreline and/or cliff top position in relation to the proposed development. Is the proposed development expected to be lost to the sea, and if so, when?

.....

15. Provide details of measures required to protect the proposed development from loss during its design life. How will the development be safe through its planned lifetime, without increasing the risk to life or property, or requiring new or improved coastal risk management structures or cliff slope stabilisation measures?

.....

16. Provide details of measures required to provide safe access and egress for the site and its users over its planned lifetime?

17. How will the development enhance the ability of communities and the natural environment to adapt sustainably to the impacts of a changing climate?

18. Demonstrate that the development will not affect the stability of the coast or exacerbate the rate of shoreline change.

19. Demonstrate that the development will not cause cliff destabilisation caused by the presence of groundwater in or close to the cliff face due to land drainage and run-off issues. *Please provide a Geotechnical Appraisal Report appended to this Coastal Vulnerability Assessment that follow the requirements provided in Annex A1.*

20. Set out details for how the development will be managed at the end of its planned lifetime.

21. Where appropriate, provide evidence of wider sustainability benefits that outweigh the impact of coastal change.

22. Any other relevant information.

23. Declaration:

I understand that the information contained in the Shoreline Management Plan and relevant FCERM Strategy is subject to change and contains the following uncertainties

- Future coastal change / erosion risk trends are not predicted with certainty and future shoreline positions are shown as indicative bands of risk at a range of future intervals. These assessments will change over time as more evidence is captured and analysed.
- Where future policies or strategic approaches are based upon the provision and maintenance of coastal risk management structures to resist coastal change, it is not possible to guarantee that funding will be available to deliver this objective.
- It is possible that where the provision and maintenance of coastal risk management structures is required to sustain a development over its planned lifetime, then a contribution toward the cost of structure management may be

sought from the beneficiaries (including owners/occupiers of properties protected by the structures).

- Policies and strategic approaches to implement them are reviewed and updated at regular intervals, and may be changed to something less favourable than indicated at present.

I confirm that the development proposal is made with a full understanding and acceptance of the risks associated with coastal change contained in the relevant parts of the Shoreline Management Plan, relevant FCERM Strategy(ies) and also the uncertainties listed above.

24. Signed by the applicant:

.....

25. Printed name:

.....

26. Date:

.....

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Annex A1 Geotechnical Appraisal Report Requirements

A.1 Approaches to the investigation of coastal land instability

Ground investigations are undertaken to determine site specific geology, geomorphological processes and the geotechnics of erosion or instability problems in an area.

The approach to geotechnical investigations can vary, and there is a range of national standards, technical documents and general literature that provide guidance for the geotechnical investigation of instability problems in the UK. However, Chapter 4 of the *Cliff Instability and Erosion Management in Great Britain: A Good Practice Guide* (Halcrow, 2011) provides a concise overview of the most appropriate approaches for investigating coastal land instability, including the use of early warning and monitoring systems and the value of ground stability (a.k.a. geotechnical appraisal) reports in ensuring that appropriate expert assessment and evaluation of land stability has been considered in producing development proposals (refer to Section A.2).

A.2 Suggested structure and content of Geotechnical Appraisal Reports

Geotechnical Appraisal Reports prepared to support a planning application are recommended to broadly adhere to the following structure (adapted from Halcrow, 2011):

- 1) **Introduction:** a statement indicating for whom the work was done, the nature and scope of the investigation, its general location, its purpose and the period over which it was carried out.
- 2) **Description of History:** a detailed description of the site based on observations made by a Competent Person (i.e. a chartered geomorphologist, geologist or engineer with experience of coastal cliffs and landslides) during a site reconnaissance. It should be referenced to a plan of the site showing national grid co-ordinates and to a scale no smaller than 1:2,500. Use of GIS is recommended to manage spatial data.
- 3) **Investigations:** information consulted during the course of the desk study should be referred to and listed as an appendix. Fieldwork should be described and full records of boreholes, trial pits or other exploratory methods included as an appendix and their locations shown on a plan. Site tests and laboratory tests and methods should be similarly described and their results included.
- 4) **Ground Conditions:** descriptions of the ground conditions found during the investigation and an interpretation of their relevance to the stability of the site and surrounding area. Anomalies in any of the data collected should be pointed out. The following items should be discussed, where appropriate: geological conditions, hydrogeology, history of past events and ground movement rates, soil and rock properties, other factors (e.g. coast protection).
- 5) **Evaluation of Stability:** the global stability of the site and relevant adjacent area should be evaluated with respect to the proposed development and the assessment of ground conditions. Where global stability calculations are carried out, the method of analysis shall be stated. The global stability calculations must demonstrate both the existing factors of safety and, where appropriate, the factors of safety that would be created by the proposed development and any associated stabilisation measures.

Where structures or services are present and adjacent to the proposed site/works and there is potential for the temporary or permanent works to induce deformation,

displacement or settlement, a detailed assessment is to be undertaken to demonstrate that deformations, displacements, or the induced settlements generated are within tolerable limits for both the temporary and permanent condition.

It is expected that particular attention should be paid to the gradients of cut slopes and fills, applied loads (for both the temporary and permanent state), drainage measures, retaining structures/lateral support measures, failure mechanisms and the design criteria applied must comply with the appropriate codes of practice, standards, Eurocodes and national annexes.

6) **Conclusions and Recommendations:** the Competent Person should summarise the main conclusions of the investigation and list the recommendations to ensure both the long-term stability of the site (taking account of the anticipated life of the development) and also in the short term whilst construction proceeds (i.e. ensure the stability of the temporary works). It is expected that particular reference will be made to matters such as: the avoidance of material storage/imposed loads near the crest of steep slopes, restrictions on the depth of excavation at the toe of steep slopes, the maximum length of trenches excavated along the contours of steep slopes at any one time, avoidance of septic tanks and soakaways, provision of flexible jointed pipes capable of sustaining small movements without leakage, provision for free drainage of groundwater, minimising drainage diversions and their lining where site conditions require them.

A.3 Geotechnical Appraisal Report Declaration Form

Alongside the Geotechnical Appraisal Report, the following declaration form should also be submitted (adapted from Halcrow, 2011):

Site Name	?	
Site Address	?	
Category	Question	Answer Yes / No / Uncertain / n/a
A) Competent Person	Has a Competent Person or Geotechnical Specialist prepared the report?	
	Does the Competent Person or Geotechnical Specialist operate a Quality System which meets the requirements of BS EN ISO9001?	
	Does the Competent Person or Geotechnical Specialist have a minimum of £1m Professional Indemnity Insurance?	
B) Site History	Has the site been affected by past ground instability?	
	Is the site located within or adjacent to any instability features?	
C) Site Inspection	Has a detailed site inspection been carried out?	

	Does the site and adjacent land bear any geomorphological evidence of past or incipient ground instability?	
	Does the site or neighbouring property bear any evidence of structural damage or repairs that might be associated with ground instability?	
D) Geotechnical Desk Study	Have any previous ground investigation reports and/or borehole records from the site been consulted?	
	Is the information consulted and referred to sufficient to quantify the ground behaviour constraints, which could affect the stability of the site?	
E) Ground Investigation	Has a ground investigation been carried out and have the results been submitted in support of this application?	
	Did the investigation identify the presence of sub-surface shear zones and low strength compressible soils at the site?	
	Is the information sufficient to quantify the ground behaviour constraints, which could affect the stability of the site?	
F) Stability Assessment	Is the information in B, C, D and E (where applicable) adequate to assess the stability of the site and adjacent land?	
	Can ground instability reasonably be foreseen within or adjacent to the site within the design life of the proposed development, allowing for any deterioration of ground conditions caused by the development itself?	
	Can instability be reduced to a reasonable level through cost-effective mitigation and stabilisation measures that would be environmentally acceptable?	
G) Mitigation Measures	Have mitigation measures been proposed with respect to ground instability issues?	
	Have these been designed to reduce the effects of actual or potential instability to tolerable/allowable limits?	
	Is it possible the mitigation measures may have an adverse effect on the stability of other, adjacent sites (for example by affecting groundwater drainage in the area)?	

H) Name, Qualifications and Signature of Person Responsible for the Geotechnical Appraisal Report	Full Name: Qualifications: Signature: Company Represented (if applicable):
--	---

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BNG checklist: Self-Build Proforma

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BNG Checklist

1. Are you applying for an exemption from BNG?
 - Yes
 - No If selected, go to question 4;
2. If yes, please select your exemption;
 - De-minimis If selected, go to question 3
 - Self-Build If selected, please fill out the [self-build proforma](#)
3. If you have selected de-minimis, please provide;
 - **A Biodiversity Net Gain Statement** to include;
 - dated aerial photographs and
 - dated photographs of all parts of the site and,
 - a written explanation of why the applicant considers the exemption to apply.
4. If no exemption is applicable, the below must be provided;
 - **Up to date Statutory Biodiversity Metric** completed by a competent person, to include all existing habitats at baseline, those existing habitats to be retained or enhanced and any new habitats to be created. A Small Sites Metric may be provided in accordance with these details - .
 - **Completed Condition Assessment forms** for each existing habitat that has been assigned a 'condition' within the metric (applicable when using the Statutory Biodiversity Metric);
 - **A Biodiversity Net Gain Statement** to include:
 - dated aerial photograph/s;
 - dated photographs showing all parts of the site and each habitat parcel within the site;
 - a description of each habitat parcel;
 - steps taken to minimise the adverse effect of the development on the onsite habitat and other habitat within adjoining or nearby sites;
 - details of how the biodiversity gain hierarchy has been applied in the design of the development to maximise the retention and enhancement of existing habitat and creation of new habitat onsite. Please see [here](#) for further details of what is expected to this part of the assessment [LINK](#) .

- details of how the proposed habitat relates to and helps provide connections to habitat within surrounding sites.
- **Habitat plans** – Clearly defining the individual habitat parcels. Habitat plans for both baseline (existing) habitat and post development onsite habitat should be provided;
- Where any ‘significant’ biodiversity gains are proposed, a **draft Habitat Management and Monitoring Plan (HMMP)**. This will be likely be required where habitats such as trees and other habitats of medium or higher distinctiveness are proposed. The Defra [Habitat Management and Monitoring Plan Template - JP058](#) should be used. This will set out full details of how the habitat will be managed and maintained for a minimum of 30 years and will enable agreement on the monitoring frequency for proposed habitats. It will also include full details of who will be responsible for the management and maintenance of the habitat, and for reporting to the council on the success of the habitat.
- Where there are no significant biodiversity gains and for all other ecological enhancements, a **draft Landscape and Ecological Management Plan** will be required.

The Biodiversity Metrics, User Guides and Condition Assessments can be accessed here: [Statutory biodiversity metric tools and guides - GOV.UK](#)

*The Small Site Metric User guide sets out the circumstances when the small site metric can or cannot be used.

Please also see BCP’s BNG Guidance [LINK](#)

Self-build/Custom house building BNG exemption proforma

This form should be completed and submitted with an application where an exemption from mandatory Biodiversity Net Gain is claimed due to the proposed development being for self-build or custom build housing.



Applications claiming self-build exemptions need to be supported with the following information:

- Completed pro-forma to confirm the applicant agrees that the development meets the definitions of self-build and custom housebuilding as set out in the Act;
- Land registry documents (title and deed) dated within the last 3 months

It is also highly recommended that the baseline habitat value is also submitted along with photographs demonstrating the habitats onsite.

These proposals will be subject to a legal agreement that will secure the use of the dwelling as self-build as defined in the Act for a period of 3 years following decision. This will show in conveyancing searches.

Please note that if the dwelling does not meet the self-build definition at any point within these three years following decision, then the applicant will become liable for fulfilling the statutory biodiversity gain condition.

If this occurs, the occupier will be responsible for supplying the following information and paying the relevant fee to discharge the condition:

- A Biodiversity Metric with the baseline score calculated;
- Dated photographs of baseline habitats and a dated aerial photograph of the site if possible;
- A redline plan;
- Land registry title and deeds dated within the last 3 months; and
- A baseline habitat and post development habitat plan.

Please note that the suite of BNG information can be expensive. Further, the Town and Country Planning Act 1990 Schedule 7a, part 1, 6B states that if there is insufficient evidence of the baseline value from before the carrying out of the proposal, then the baseline value needs to include the highest biodiversity value that can reasonably be supported by the available evidence relating to the onsite habitat. As a 10% uplift from the baseline is required, this could mean that more units need to be purchased than if the baseline values are known and agreed with the LPA hence why it is encouraged that baseline habitat values are submitted with a planning application claiming this exemption.

Please complete sections 1-5 below.

1. Regulation 8 of the Biodiversity Gain Requirements (Exemptions) Regulations 2024 states that the following in relation to self-build and custom build applications.

8.-(1) The biodiversity gain planning condition does not apply in relation to planning permission for development which—

- consists of no more than 9 dwellings;
 - is on a site that has an area no larger than 0.5 hectares; and
 - consists exclusively of dwellings that are self-build or custom housebuilding as defined in [section 1\(A1\) of the Self-build and Custom Housebuilding Act 2015](#) ("the 2015 Act")

2. In the 2015 Act "self-build and custom housebuilding" is defined as meaning the building or completion by—

(a) individuals,

- (a) associations of individuals, or
- (b) persons working with or for individuals or associations of individuals, of houses to be occupied as homes by those individuals.

However, it does not include the building of a house on a plot acquired from a person who builds the house wholly or mainly to plans or specifications decided or offered by that person.

3. The Government has also produced [Self-build and custom housebuilding guidance](#).

Information within it may provide assistance in interpreting the 2015 Act and in that respect, in considering whether the self-build and custom housebuilding exemption from mandatory Biodiversity Net Gain is relevant to a particular proposal. For example, the guidance identifies the following:

- Self-build custom housebuilding covers a wide spectrum, from projects where individuals are involved in building or managing the construction of their home from beginning to end, to projects where individuals commission their home, making key design and layout decisions, but the home is built ready for occupation ('turnkey').
- In considering whether a home is a self-build or custom build home, relevant authorities must be satisfied that the initial owner of the home will have primary input into its final design and layout.
- Off-plan housing, homes purchased at the plan stage prior to construction and without input into the design and layout from the buyer, are not considered to meet the definition of self-build and custom housing.

4. Application details

Site address	Click or tap here to enter text.
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Name of applicant	Click or tap here to enter text.
Email address	Click or tap here to enter text.
Phone number	Click or tap here to enter text.
Description of development	Click or tap here to enter text.

5. Please complete to confirm agreement of the following (please use 'fill and sign' to mark with a tick or cross).

- I confirm that the proposed development meets the definitions as set out within Regulation 8 of the Biodiversity Gain (Exemptions) Regulations 2024 and Section 1(A) of the Self-build and Custom Housebuilding Act 2015.
- I have submitted evidence in support of the planning application to demonstrate how the development meets the self-build/ custom build definitions and to enable the application to be validated.
- I confirm that I understand that the description of development may need to be worded/amended to reflect and include reference to the fact that the proposal relates to self-build or custom housebuilding

Signature and date

Signed Click or tap here to enter text.

Date: Click or tap here to enter text.

Please note: whilst self-build and custom build housing development may be exempt from the requirements of the statutory biodiversity gain condition requiring a 10% net gain in biodiversity, these applications will still be expected to demonstrate how they will achieve a measurable gain in biodiversity through habitat and species enhancements including bat/bird boxes, creation of hedgehog corridors through providing small gaps in fences, bee bricks and other measures, in accordance with the paragraph 180(d) of the National Planning Policy Framework

Please note: if it later turns out that the exemption is not applicable, the statutory biodiversity gain condition would apply. Commencing development which is subject to the biodiversity gain condition without an approved Biodiversity Gain Plan could result in enforcement action for breach of planning control.