



Meres and Mosses Landscape Partnership Scheme Evaluation

Themed Summaries

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Themed summary 1: The Value of Having both NIA and HLF funding.

The Meres and Mosses of the Marches programme benefited substantially by receiving 3 years' funding through a Nature Improvement Area (Department for the Environment, Food and Rural Affairs) and five years of funding through the Heritage Lottery Fund Local Partnership Scheme (LPS).

The combination of the two funding sources provided the opportunity to focus on both essential constituencies - environmental conservationists and communities: without the latter, gains by the former would not be sustainable.

To achieve sustainable impact, both communities needed to be adequately represented at the start of the programme. This was facilitated by the high profile of the NIA, which was one of only twelve across the country. This profile provided considerable leverage to engage with previously hard to reach groups, for example local businesses, and to achieve deeper engagement by others, for example Higher Education institutions.

The Business Environment Network (BEN) has achieved significant benefits and contributed to sustainability through ensuring that conservation is on the agenda for businesses. It also provides a route for businesses to engage directly in conservation activities, through staff volunteering.

The diversity of organisations and the seniority of staff on the NIA steering group greatly facilitated networking and partnership development by the Local Partnership Scheme. Having both funded programmes running together for the first three years, ensured that the development of activities for both constituencies could proceed in step with each other. Staffing flexibility and the retention of skills within the team was facilitated by having the two sources of funding with complementary but differing aims.

The extended period of LPS (five years) enabled the consolidation of gains made under the three-year NIA by embedding community awareness and volunteer actions as well as providing a sufficient period of time for some engagement activities to come to fruition.

The LPS required match funding for which NIA was 'clean'. Although NIA money did not provide the entire required match, this was a huge advantage in that managers did not have to devote the majority of their time to chasing match funds. They were thus able to devote most of their time to delivery.

Overlapping funding can mean (as it did for the Meres and Mosses team) that the funding streams operate over different time periods, in the case of the NIA and HLF three years and five years respectively. The overlap allowed for continuity in certain areas which proved positive and allowed for some of the work to become properly embedded and support legacy activity. It is useful to note that in many other NIA areas where funding was applied for to support follow on work the break which came often led to loss of staff, continuity and momentum.

Many bids require match funding from other sources. SWT were helped by the ability of the NIA and HLF funding streams to support each other. Many other bodies need to go and seek other sources of support and this can be valuable and rewarding, sometimes engaging with a partner organisation that will have long term value. It can also be both time consuming and sometimes complex, taking time and effort that would otherwise be invested in the project objectives.

The combination of funds provided sufficient resource to allow the employment of a dedicated full-time financial administrator.

Final

The reporting formats were very different for the two programmes. However, the high level of detail required for NIA reporting provided SWT with a lever to obtain more detailed information from Partners than might have been possible under LPS alone.

Themed Summary 2: Building Community Involvement

The Meres and Mosses programme has undertaken wide-ranging activities to harness community engagement and involvement with two objectives:

- To raise awareness about the existence and importance of this special landscape in Shropshire amongst individuals and groups;
- To get individuals and groups involved in projects and work that will help to protect the Meres and Mosses, not just now but into the future.

There is plenty of evidence of the diversity of activities and audiences which have delivered the programme's intention to try different approaches to see what works. Every project will have helped to raise public awareness and surveys show that awareness has increased over the life of the programme. One might anticipate that attendance at a talk or on a walk would have a positive but transitory effect; however, some projects demonstrate a permanent effect on those involved. For example MediaActive delivered a digital creativity programme for young people which was very beneficial in making clear the significance of the landscape and its flora and fauna, but an unexpected additional outcome was that MediaActive's staff are also now much more aware of the landscape in which they operate and are using it as a backdrop for videos. The programme has supported Blackberry Fair since 2013; the street fair is a well-established celebration of nature. Its organisers are enthusiastic about protecting the Meres and Mosses and will continue to promote their importance. These are two examples of how the programme has created long-term advocates amongst those with whom it has engaged.

An extensive amount of work has taken place with school pupils and has included lots of 'fun' activities that will create a positive memory for the young people involved. Today's young people will be tomorrow's volunteers and conservationists, so this is a valuable way of helping to build long-term awareness and engagement with the landscape in which these youngsters are growing up and may even help to spark an interest in conservation as a career.

The programme has taken advantage of young people's interest in technology and media to provide a lever to engage with young people, involving them in film-making, broadcasting, photography, interviewing and software development. The 'conservation is fun' theme has underpinned the success of Merefest, which offers information, education and activities for the whole family and has the potential to continue independently from the programme.

Local groups and communities have benefited from the programme through the community grant scheme. As a result, some tangible and long-lasting reminders of the Meres and Mosses LPS have been created, for example, a new pond at a school in Welshampton.

The grants programme was not easy to operate, taking much more time to find and work with applicants on their bids than originally envisaged. However, there are benefits from working intensively with applicants, with whom stronger relationships are developed. Some communities have been identified, where there is a strong will to support the objectives of the programme. In Whixall, for example, the interaction between the programme team and local people has led to the proposed remediation of an old scrapyard and eventual development of a visitor centre on the site that will continue to tell the Meres and Mosses story for a long time.

The programme has benefited from a committed and enthusiastic Communities Officer who has taken the Meres and Mosses message to many different communities and successfully found solutions when engagement proved to be a challenge.

The key learning points from the programme are:

- Using many different forms of engagement and activity with a variety of audiences to spread the message widely;
- Having the right member of staff working with the local community;
- Making the activity entertaining/beneficial so that people are more likely to take on board the message and to want to stay involved;
- Using activities to find community activists who will continue to 'fly the flag';
- Recognising that true engagement takes a lot of effort and a potentially long timescale.

Theme Summary 3: The challenges of grant programmes

The Funding Environment

Bidding for project funding has become a common and accepted part of activity across the whole economy. The sources of funding are diverse and are accessed through a range of programmes, each with a set of defined objectives and priorities, with rules or at least guidelines as to how it wants money spent.

Funding can be cascaded through intermediary bodies; so that an organisation may apply for funding to achieve a particular set of objectives and as part of that it will in turn offer smaller grants to others to undertake some activity which contributes towards its objectives under the funded programme. Grant schemes often form part of HLF programmes, not least as a way to build community engagement and involvement.

Meres and Mosses Farm and Community grant schemes

The Meres and Mosses community grants programme benefited community groups, community activities and schools in a bid to engage local people with the importance of the Meres and Mosses landscape. The grant scheme has added considerable value to the overarching HLF programme by involving people and giving them a greater depth of understanding and appreciation of the area.

Operation of the grants scheme has not been without its challenges. Fewer organisations came forward for funding than expected, so more effort had to be put into marketing than anticipated. Working one-to-one with groups was found to be the best method of achieving a successful application but the resource necessary to do this had not been factored in at the outset. However, even before the application could be made, programme officers found that help was also needed to fully form the project concept.

Getting the size of grant right is important for the funder and the applicant. When the Meres and Mosses farm grants were first launched the maximum was £1,000; however that was proved to be unattractive because it was not enough to make a significant impact on many of the issues farmers wished to tackle.

The maximum farm grant was raised to £3,000 and this proved much more effective and attracted positive comment from farmers, enabling them to tackle relatively small projects that can often have a major and long-term effect, but is not always easily covered by other funding. Equally sometimes the grant has been used with overlapping funding to develop a more significant project.

Bidding

A few of those making applications for community, and most of those applying for farm grants, had some previous experience of applying for funding but, even so, for community grants, many found the process challenging. Match funding of one third of the project cost could be made in kind rather than cash. Finding the match was a useful way of demonstrating the commitment of the applicant group although it was also challenging for some groups.

The process that sits behind making an application was, perhaps, the key factor that caused some problems because a structured approach is needed to deciding what the project will do, what goods and services are needed and getting quotations for them, for securing volunteers' commitment of time and creating a project action plan. Nevertheless, the process is a simple form of business planning and was seen as valuable by the groups.

For farm grants and in interviews with grant applicants, the Meres and Mosses programme was commended and held up as an example of good practice, compared to the complexities of other funding sources. Several consultees have commented on the ease and straightforward approach of making an application to the Meres and Mosses LPS and the complexities of applications they have made to DEFRA.

Working with the project

Applicants need to be made aware of the when money is forthcoming and what is required to trigger it. For example, an approved farm grant to install rainwater harvesting may be triggered by the farmer submitting three quotations for doing the job from suitably qualified contractors and agreeing which one is to be accepted and why.

Sometimes engaging with a particular constituency can take quite a while. The Meres and Mosses LPS found that in some cases real engagement came after about four or five years, longer than NIA funding alone would have allowed for.

Conclusion

The main lesson for any Programme team is not to expect groups or individuals to 'dash for the cash'. Potential grant recipients will need to be approached proactively, helped to develop their ideas and supported through the application process. Consequently, building in sufficient time and resource to do this is important, as is starting the process at an early stage in the programme to give applicants the time they need (bearing in mind working with voluntary groups in particular is not always quick).

For grant applicants there is benefit in being able to access help and advice that is clear, knowledgeable and supportive. SWT has a good reputation for providing this particularly related to farming and wetland conservation issues, and there is a need for this type of support to be widely and easily available.

In addition, the following points should be noted:

- Grants will allow small but effective projects to be undertaken by groups other than the core delivery team and will demonstrate meeting the needs of local communities.
- Publicity for the schemes needs to start as soon as feasible within the funding period. It should make use of a number of publicity channels such as leaflets and the web but also direct discussion with organisations or individuals that might be interested and help with developing their ideas into a viable grant application.
- The maximum grant amount needs to be sufficient to mitigate the time spent applying for the funds.
- The conditions for the grant need to be broad enough to make it interesting to applicants as well as to the HLF programme.
- Many applicants are unlikely to be adept in making applications and will need support.
- Successful applicants need to be reminded and guided about publicity and use of logos, to ensure compliance with the terms and conditions of the grant.
- Getting the grant allocation spent is likely to be one of the most difficult parts of the HLF funded programme and will need dedicated staff resource allocated to it.

Themed Issue 4: Time planning

The NIA funding period was 3 years, but the HLF LPS ran for 5 years, and this duration of funding is important to the success of the programme.

There are a number of reasons for this. Firstly, the initial delivery team did not have the right skill set to get the full range of projects up and running, in effect slowing and delaying a large part of the first year of delivery. Then the project manager moved on, requiring the lead body to recruit a new project manager and a new administrator. Once in place, these individuals had to become familiar with the complexities of the agreed programme and make up for lost time. While some of these circumstances are unique to the Meres and Mosses programme, other HLF schemes are likely to come up against some issues as they move from the development phase to the delivery phase.

Some aspects of the programme seemed simple on paper but have taken rather longer to bring to fruition:

- The challenges of finding animals to graze scrub at Brown Moss, once the fencing had been installed, took a long time to resolve (4 years).
- Certain 'Skills to Explore and Discover' and 'Skills for Fun' courses have taken longer to arrange than anticipated (Angling, Cheese Making).
- Encouraging schools to take part in John Muir Awards and Camps has taken time, with schools contacting the team towards the end of the funding period to say they would like to come on board after being approached several times over four years.
- The planning requirements for installing Brown Signs mean that these will only be in place in September 2017 and only in Shropshire and Wrexham District.
- Grant schemes take longer to implement than planned (see Themed Issue 3), with voluntary groups needing more support and lead-in time than might be anticipated.
- Grants for works in the field can be affected by seasonal factors and extreme weather conditions, so may need the potential for contingency time within the programme delivery period.

The lead time on certain aspects of delivery therefore mean that a longer time frame for funding is a distinct advantage. Other activities, which were closely aligned with partner organisation priorities, were easier to get moving quickly, such as the work on footpaths.

Theme Summary 5: Partnership Development

In the LCAP Action Plan 2012, partnership working was at the heart of creating a sustainable future. The Partnership identified both strategic approaches and practical outcomes that would create the foundations of a strong legacy for the LPS HLF funded programme. The LCAP recognised that effective partnership would not be just about bringing together a group of organisations: looking for common priorities and understanding what each partner wanted to get from the work were intrinsic to making the Partnership itself successful in the long term.

In common with anyone who has ever worked on partnership development, Meres and Mosses Landscape Partnership Scheme has experienced the challenges as well as the rewards of partnership working: while some partners under-deliver or disengage, others commit and deliver well beyond expectations.

By the close of the programme, a broader group had been constituted – the Meres and Mosses Wetland Landscape Partnership – which builds on the core LPS group and has assumed strategic responsibility across the wider Meres and Mosses area. This Partnership will be able to learn from the work conducted by the LPS.

The Partnership also has a number of groups and committees that will champion particular themes into the future. A prime example and one of the programmes particular successes, is the Business Environment Network. This started as an informal group of public and private sector representatives but has now grown into a membership organisation of 40 businesses in its own right, with subscription income, its own website and a forward programme of events.

Given that the LPS programme has achieved many of its objectives and targets under the stewardship of the core partnership, it seems reasonable to assume that there are strong foundations in place on which the wider partnership can build. Of course, resources make a difference but partners have agreed to move the secretariat function away from the Meres and Mosses team as it slowly disbands at the end of the funding period, and there is a programme of meetings going forward.

Working with the public sector

The public sector has played a valuable role in steering and implementing the Meres and Mosses programme; delivery would have been impossible without their involvement. Strong relationships have been developed, particularly at Steering Group level and will endure beyond the programme. Nevertheless, making the relationships work at all levels has sometimes proved demanding for the Programme team.

A key challenge has been that the enthusiasm and commitment of senior officers has not always been effectively cascaded throughout their organisations. The impact of this is that practical implementation of some projects has not been as straightforward as expected and, in some case, has been seriously curtailed. The problems do not necessarily arise because of unwillingness on the part of officers (although this may sometimes be a factor): there may be legal and process-driven requirements, including public consultation that can get in the way of implementation.

The main lesson here is about preparation, planning and about formalising commitments at the outset. If a project is a critical part of the delivery programme, thinking it through carefully with delivery partners, understanding exactly what will need to be done and even setting down an explanation of who does what in a Service Level Agreement may avoid problems later on that can disrupt the successful delivery of an important project.

Changing circumstances

Between the development of the LCAP in 2011 and 2012, when the Meres and Mosses programme was getting into its stride, there were a number of changes in the local economic and political environment which have provided challenges to the Meres and Mosses team.

A number of partners have faced significant funding cuts and associated reductions in staffing numbers and reduced responsibilities. There have been changes in public sector structures and responsibilities, not least in the early part of the programme following the major exercise of changes to the machinery of government carried out by the Coalition Government between 2011 and 2015. This has meant that the support and promotion of parts of the original Meres and Mosses programme expected from particular partners has not happened, or has had to be reduced, curtailed, or added back in at a later date. Finding ways around this has been possible due to the five year funding horizon offered by the LPS (see Theme Summary 4).

Such changes in the operating environment are likely to be the case in any four or five year programme, during which at least one partner is likely to experience significant change. The managing body, in this case the Meres and Mosses team at Shropshire Wildlife Trust, has to understand the challenges their partners face, and find ways to work around any problems. Here, the team have taken on extra responsibility for making things happen where they can, including finding other ways to engage key organisations, taking a different approach to Parish Planning, and doing themselves some of the work that had been expected from others. While this has not always been well received by other partners, it was expedient and has ensured that the bulk of the outcomes contracted have been achieved.

The key learning points are:

- The volatile nature of the current political and economic situation will mean that in any longer scale project or partnership, circumstances will change, possibly radically, for at least one participant organisation.
- Service Level Agreements can assist in formalising responsibilities for specific projects and activities.
- The lead partner will need to be empathetic and understanding about the changed circumstances.
- The lead partner is also likely to need to be pragmatic about finding ways to ensure that the overarching aims of the project or partnership are not derailed by the change in circumstances.
- It may not be necessary for the lead partner to take on all the load of a change in circumstances, as new partners or delivery organisations may be able to pick up where the original partner has had to leave off.
- Partners downsizing may offer opportunities to other members of the partnership or delivery group, including staffing.
- The programme manager needs to understand, to a reasonable extent, the operating environment of all partners and the pressures and constraints they work within.
- In a similar vein, HLF will need to be aware that such changes are likely and be sympathetic to any approach by the lead partner to negotiate changes in plans that are necessitated by changed circumstances. Our observation has been that this is the case.

Theme Summary 6: Systems

HLF is a flexible fund, and because no two projects are alike, its reporting portal has to be flexible enough to accept all kinds of outputs, and accepts data at a highly aggregated level. This is excellent for keeping bureaucracy to a minimum, and is indeed one of the great benefits of this funding route.

Systems for managing the programme

However, project managers need to be aware that the reporting requirements of HLF do not provide sufficient detail in management information to enable robust programme management. This means that every scheme ends up either using the lead partner's systems (which may or may not be suitably flexible for this purpose) or developing systems and reporting tools of their own. Indeed, it is true to say that HLF's flexibility in what it requires might lead programme managers to underestimate the monitoring and data collection required to meet the needs of their partnership and other funding schemes, and also to run the programme successfully.

While the initial spreadsheets developed for monitoring progress grew in an ad hoc and unplanned manner, the programme manager and administrator had to tighten up processes significantly. When the systems were reviewed as part of this final evaluation, managers were easily able to confirm spending to the nearest pound, volunteer hours and match fund equivalent and the broad progress of every grant and sub-project. It was less easy to aggregate outputs to match the initial targets however.

A clear learning point therefore, is that **management systems** need to be set up by the programme manager to meet the needs of running the programme, rather than the needs of HLF. Systems need to be easy to maintain and interrogate as well as easy to update to meet changing requirements and circumstances. They also need to be capable of showing how well projects are progressing against their time plan and outputs, enabling intervention and remedial activity if progress begins to slip.

Monitoring and Evaluation

The Meres and Mosses manager felt that the NIA programme did not have sufficient guidance on monitoring and evaluation to ensure that these processes were adequately resourced in the business plan. Consequently it had been difficult to build them in from day one to enable better tracking of programme achievements from day one. Ultimately, NIA monitoring and evaluation were augmented through resources provided by a corporate grant. For the LPS, while there was funding included for evaluation activity, in practice little was done until the midterm review.

The lack of building in evaluation from day one is clearly reflected in the challenge of linking particular projects and activity areas with specific programme objectives in this final evaluation. Some work with logic chain modelling or theory of change at the outset could save money and effort in the long term, as well as making it easier to demonstrate the overarching impact of the funds. It will also help to identify measures for outcomes and the impact of the programme that can be measured during the programme – some of the outputs were unlikely to be achieved during the life of the Meres and Mosses LPS because they depended on more than the activity of the programme to be achievable. The targets for particular species would be included in this category – conditions can be made favourable for their return, but their actual return or proliferation will be dependent on other factors as well.

It was also evident that monitoring and evaluation was not integral to the delivery of the programme, as key measures were not followed up from the start such as the systems for monitoring visitor numbers at key sites. Nor were baselines developed in a systematic and replicable manner, meaning that surveys with the general public had to include a degree of retrospective assessment. This has worked, but has perhaps diverted evaluation resources from other aspects.

Key learning points:

- Build in monitoring and evaluation methods from the start of the programme delivery if not before.
- Ensure robust and sufficiently detailed management information systems are developed to facilitate programme management.
- Ensure clarity on how projects and outputs contribute to the aims and objectives of the programme overall.
- Ensure that outputs are feasible within the lifetime of the programme, and that if they are not that there are proxies in place demonstrate that progress is being made towards achievement.

Theme Summary 7: Developing Sustainable Events

As part of the awareness raising part of the programme, the Meres and Mosses team were charged with running a number of events, either significant events on an annual basis, or smaller events and activities. The output targets for all of these have been met, and some series of events have proved to be particularly successful: Merifest, Blackberry Fair, the Meres and Mosses Forum and events run for the Meres and Mosses Business Environment Network.

Merifest has done well in raising awareness of the Meres and Mosses, the partners involved in it, and wildlife and conservation issues, and exceeded the target for number of visitors significantly. Understanding the reasons for this will help Shropshire Wildlife Trust, its partners and others to build on this success.

From the visitor survey undertaken by MRE at Merifest 2016 and from the ever increasing numbers attending, it is clear that publicity is ensuring that new visitors come, as well as bringing repeat visitors. Merifest has its own Facebook page, with over 1,000 followers (as at 28 August 2017), which is updated nearly daily in the run up to the event (2016 and 2017). Photographic evidence from events from 2014 to 2016 shows that there are some regular exhibitors, lots of demonstrations, hands on activities for young people, a chance to get on the water, music and arts, food and drink outlets as well as sponsorship from local employers to embed the event in the community.

The breadth of organisations, activities and companies involved in Merifest has helped to embed appreciation and understanding of the area and its many attributes in a wide section of the local population. This breadth of audience is fundamental to the aim of improving awareness of the special area.

While organisation had initially taken a significant amount of one team member's time, that reduced in 2016, with the involvement of professional event organisers, which continued into 2017. The event continues to evolve and in 2017, after HLF funding finished, event goers were charged a nominal sum for entry to support the event and help fund preparations for a future event in 2018.

The first Merifest was held at Cholmondeley Estate but since then it has taken place at Cremorne Gardens in Ellesmere, on the side of The Mere. This drew people to the area where they spent money, hopefully to the benefit of the local economy. The event has been held in mid-September each year, outside of school holidays but during a period when the weather should be relatively clement. In 2016 the weather was exceptionally good, which helped to contribute to the large number of visitors on the day.

Partners who run membership schemes have been able to promote their organisation, and sign up new members. This does not sit well with some partner organisations that do not have paying members and find this activity unnecessarily commercial. However membership is the life's blood of Wildlife Trusts, the RSPB and similar, and has to be part of their presence at such an event. In addition there has been some concern that representatives have worn their own organisation's uniforms or badges, which has caused some friction and possibly needed better clarification from the outset. Observation of the 2016 event showed that the organising team from the Meres and Mosses wore Meres and Mosses logos, but that exhibitors from partner organisations, including the two Wildlife Trusts, the local authority, RSPB and all other exhibitors, wore their own uniforms and logos, demonstrating commitment across a wide range of organisations.

Over the years, Merifest has become a flagship activity for the Meres and Mosses LPS, with the danger that it took more than its fair share of staff resource. The progression to using

specialist support was a decision well taken. At the same time, it has also been a major contributor to expanding awareness of the area and of the work of the LPS team and all its partners. This type of activity is crucial in helping to ensure a legacy outside of the section of the population that is truly engaged and committed to supporting the environment.

The key learning points are:

- Organising events will take more time than envisaged and planned at the outset.
- The resource for a large and successful event can necessitate using external specialist contractors to support the team.
- All contributing partners should get some advantage from attending the event
- There needs to be complete clarity about roles.
- Membership based organisations probably will want the opportunity to sell membership – this is generally how they survive commercially. Non-membership organisations need to understand this.
- There will always be unexpected issues on the day, and the organising team need to be free to deal with them.
- It takes time to establish an event in the local calendar and local perception.
- A good range of activities, exhibitors and demonstrators will help to draw in a wide range of the public, attracting parts of the local population that may not be attracted by a purely wildlife or ecology event.