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Outdoor recreation organisations and resource managers often rely on funding support from external sources to supplement their core work programmes. The external funding environment is constantly changing, with new schemes and programmes introduced, as others end.

Overall however the amount of money available from many sources is reducing. For example, for the period 2007-2013, there has been a lower allocation of EU funds to the UK, while funding from the National Lottery has also fallen, as money has been diverted to support the 2012 Olympics. Also there is no doubt that the funding environment is becoming more competitive as organisations gain a greater understanding of what needs to be done to access funds and become more proficient at successful delivery of project outputs and outcomes. Nevertheless, new funding sources are continually coming on stream. In particular the Big Lottery Fund has introduced a number of new programmes which have particular relevance for outdoor recreation, focusing on aspects such as healthy living and the natural environment. The Access to Nature programme (managed by Natural England) is an example of the letter.

Through this Seminar we reviewed trends in funding and looked at the potential implications for countryside recreation, from the perspective of both the funding agencies and the recipients of support. Delegates learnt how some of the key funding sources are changing and what future opportunities for outdoor recreation there might be through a series of presentations on specific funding sources. They also learnt key lessons in developing and managing successful externally-funded projects through the experience of practitioners. In the final session some of the key techniques for supporting successful funding applications were reviewed, including appraisal, monitoring and evaluation techniques.

Despite the changes taking place, there is no doubt that funding from third party sources will continue to provide significant support for outdoor recreation and related activities in the future. It is hoped that this Seminar will lead to the delivery of more and better quality outdoor recreation projects.
I am Sarah Preston. I work in the National Project Team. A relatively small team of a Project Manager, 4 Grants Officers, 2 assistants and Finance Manager. In this presentation I am going to tell you about Access to Nature and how it operates and then I will talk about some case studies of projects we have awarded grants already. Then there will be an opportunity to ask questions.

The Big Lottery Fund’s Changes Spaces programme was launched in 2005 to help communities enjoy and improve their local environment. There is mounting evidence to show that accessing nature and natural places does bring real benefits to people and that is what Access to Nature is all about – offering greater opportunities for people to connect with nature.

We bid into programme and received ‘in principle award partner status’. It took some time to set up the programme and undergo all Big Lottery checks and procedures (Due Diligence) as well as signing the contract (EDA) with Big Lottery Fund.

The programme was launched and open to grant applications in April 2008. The final deadline for applications is end of June 2010 and all applicants have to have completed their projects by end of Sept 2013. Final claim have to be made by end of 2013. The whole programme closes in March 2014.

The aim of Access to Nature is to bring a lasting change in people’s awareness of, access to and engagement with their natural environment

- Operating across England, targeting disadvantaged areas and communities
- BIG award of £25 million (+ Natural England £3.5million)
- Potential to reach 1.7 million people
- Grants range from £50k - £500k
- Projected 160-200 grants awarded

The concept of Access to Nature was devised by a consortium of high profile environmental organisations. They are:
British Waterways
BTCV
Environment Agency
Forestry Commission
GreenSpace
Groundwork UK
Land Restoration Trust
The National Trust
Natural England
RSPB
The Wildlife Trusts
Access to Nature is led by Natural England on behalf of the consortium. The consortium meets twice a year

Slide 5
Our vision for Access to Nature is that we want more people to value nature and the natural environment and to glean the benefits that it can offer - be they for learning, health or just for informal recreation and enjoyment.

Health and safety aspects of project will be important to address in terms of visitors to the countryside.

Slide 6
There are the five outcomes that we want to achieve from Access to Nature. Projects have to fulfil Outcome 5 and at least one other to be eligible.

There is a strong people focus in all of the outcomes

Outcome 1 has an emphasis on improved opportunities to actively experience and enjoy the natural environment (rationale – if you cannot experience something – less likely to come back for more). The target is to reach at least 1 million people. Projects that can achieve these can be very broad – to encourage people to engage who have been reluctant to do so for a number of reasons and barriers. Sorts of things they might include are themed open days, awareness raising events, improvements to interpretation

Outcome 2 is about gaining new skills and learning opportunities about the natural environment including volunteering. For example projects that provide volunteer taster sessions, leader training, education packs, DVDs and websites. The target is for 125,000 people to benefit from improved learning opportunities and participation in skills and development programmes

Outcome 3 is about investment in access links and networks to natural places. Investment in access links and associated networks Target for 130 places + and 325,000 people experiencing better links with the natural environment. E.g. green infrastructure and corridors, people engagement. This covers both physical and intellectual access.

Outcome 4 is about investment in the quality of places for wildlife and people. Target is investment in the quality of 100 natural places to better meet the needs of local people and wildlife. Also 250,000 people benefiting from physical improvements e.g. site management, habitat creation/restoration. And 5,000 people involved in the care of sites.
Outcome 5 is the sense of ownership and ensuring that there is buy in and commitment from the community and partners involved. Target is for 100% of projects engaging local communities e.g. working to bring communities together e.g. engagement activities, ‘friends of’ groups.

Slide 7
Through these outcomes there 3 broad areas of funding:

Raising awareness to enable a greater diversity of people to reach and enjoy nature
Examples could range from accessing nature for the first time either by providing better quality of information, outdoor activities and contact with nature.

Learning and volunteering
Examples could range from skilled based activities such as volunteer leaders, learning about the environment through to volunteer training sessions, identification workshops to community skills training.

Welcoming and wildlife rich places
Examples: Green networks, green corridors, national trails linking people to wildlife in an accessible way

Slide 8
We want to see new partnerships forming and to get innovative and quality applications that meet our outcomes and targets.

We want to see people and communities helping to develop and implement the projects. We want to see a bottom up approach.

We want to see projects that meet our outcomes and contribute to the wider picture working towards solving wider issues. We want projects that can offer sustainable solutions.

We want Access to Nature to be able to contribute to the knowledge base and help build the evidence that access to nature does contribute to people’s well being – We will conduct our own evaluation but will welcome applications that include self monitoring and evaluation through stories, videos, blogs and evidence based research.

Slide 9
The target audience are
- those people who under represented in the natural environment, people who lack the opportunities or knowledge to gain access to nature. E.g. disabled people, the young, black, minority ethnic and refugee groups.
- Communities experiencing social exclusion through disability, unemployment or economic disadvantage.
- People living in areas where there is a lack of accessible green spaces.
- The focus with by on areas of social disadvantage (but nor exclusively) as identified by IMD. Uses Super Output Area statistics. Each Regional Targeting Plan contains details for each region.
Supporting Outdoor Recreation - The Changing Funding Environment

The target for the grant scheme applications are those organisations who are best placed to help us reach the target audience and applications can come from: registered charities, statutory bodies, local authorities, health organisations, not for profit organisation etc. But not individuals.

Slide 10
As mentioned the majority of applications will be between £50 - £500 k and could have a national focus or regional or sub regional focus.

National projects must address identified and evidenced national scale issues – linking into national strategies and plans. E.g. Reconnecting people with nature, tackling health issues. Plenty of ideas being worked up – e.g. using the potential of existing cycleways and greenways with need to improve biodiversity and open and involve local people to these areas on their doorstep. Developing a volunteer programme across 7 major cities to link with schools and increase their learning and understanding of wildlife.

For flagship projects the deadline is now closed. The aim is to fund a maximum of 5 by February this year.

Slide 11
Regional projects will have awards of between £50,000 and £500,000. All should be guided by our regional targeting plans which are available on our website – these are due to be updated imminently. You are advised to talk to the Regional Adviser for more in depth information and help.

Slide 12
This table shows the funding levels. Projects with a total project cost of between £55,000 and £125,000 can apply for a maximum of 90% grant. 10% has to be from cash or in-kind match funding. But there is no requirement for cash match funding – can be all in-kind. The maximum grant is £100,000.

Projects with total scheme costs of between £125,000 and £715,000 can be awarded a grant a maximum of 80% of total eligible project costs. A minimum of 10% cash match funding must be provided. The maximum grant is £500,000. For projects will costs of over £715,000 a grant rate of up to 70% can be awarded. Grant awards above £500,000 will be made at a rate of up to 70% of total eligible project costs. 10% cash match funding must be provided. Applicants can of course put in more match funding than the minimum.

Slide 13
Following slides show some examples of projects that we have funded. CSV’s Engage project in Birmingham focuses on providing access to nature and the wider countryside for those facing barriers to access, and in particular to those living in areas of disadvantage. A diverse range of groups of all ages, gender, and ethnic backgrounds will receive help to engage with nature and green space locally as well as within the wider West Midlands. Regular opportunities are available for conservation work,
supported by training for group leaders so that repeat independent visits can take place and sustainability is ensured.

Engage works with primary schools through Young Ranger clubs. Each club visits a country park, where they can research the role of a Ranger and be inspired to take positive action to improve their own local park. Action could include conservation work, arts inspired by nature, and species identification, with strong curriculum links.

Through practical involvement, the project aims to get a greater number of people from diverse backgrounds to learn new skills and develop a sense of ownership of their local parks and green spaces, ensuring that they meet the needs of communities.

**Slide 14**
Map to illustrate that submitting maps as part of application are very helpful

**Slide 15**
In the Woodland Communities Project in Warrington and Runcorn run by the Woodland Trust woods are currently deserted due to antisocial behaviour making them undesirable places for the general public to visit. The aim is to turn them into bustling outdoor centres. They will be employing an Education and Community Officer – who will undertake consultation work to see what local people want, but proposing improving visual appearance of areas e.g. removing litter, fly tipping and invasive species. They will be putting on community events and woodland discovery sessions for local schools – primary, secondary and special schools. Part of the project focuses on training teachers in the skills needed to use the woods independently with pupils without need for Education Officer. Also will be working up friends groups to increase sense of community ownership and management of the areas.

**Slide 16**
At the national level the new Plantlife project – Wild About Plants – aims to motivate people of all ages across Britain to get out and enjoy nature, using plants as an accessible and enjoyable source of inspiration. Despite the proven benefits of contact with nature, there are often barriers that deny people easy access to their local natural spaces, particularly for those considered as having the greatest economic and environmental deprivation. Two different schemes will encourage people to visit a local natural space and record the wildflowers and other plants that they see.

Flowers in an Hour is an entry level scheme, suitable for those with little or no understanding of the most common wild plants. It will ask for an hour of people’s time, in a set week in each of the four seasons, and can take place anywhere and at any time of day. Using a simple identification chart people will record around ten common wild plants that they find. Over the course of a year, beginners should become familiar with 40 different wild plants and feel more confident and inspired to learn more.
The Wildflower Count is a higher level scheme, designed for those who already have some plant identification skills and want to know more. It will ask people to visit an area within 5km of their home and identify the flowers they find in a measured plot. The Wildflower Count will be supported by training days, comprehensive identification booklets and guidance on how to do the survey. Other activities included in the project will be tailored to adults and children with different motivations from different backgrounds and cultures. Examples of activities will include creating fun flora-focused games for younger children, developing resources for youth clubs, schools and community groups. Group leaders, particularly from deprived communities, will be identified in order to help reach those people who traditionally don’t get involved in these sorts of activities. Plantlife will run art and photo competitions with wildflower themes, and organise local training days and guided walks to get people together to feel motivated to learn and appreciate plants and the natural world around them.

Slide 17
The first flagship project to be awarded is to Council for national Parks for the Mosaic project

Mosaic is a strategic initiative working with black and minority ethnic (BME) communities and the National Parks. The project is a partnership between 11 organisations: 8 National Park Authorities (NPA) in England (Dartmoor, Exmoor, Lake District, New Forest, North York Moors, Northumberland, Peak District and Yorkshire Dales), the Broads Authority, the Youth Hostels Association (YHA) and CNP. The project is expected to start in 2009 and will last for 3 years. The aim of Mosaic is to ‘cement long-term sustainable engagement between BME communities and National Parks’. Working with deprived communities in 20 cities in the top 5% of urban deprivation, Mosaic will create sustainable leadership capacity in the BME voluntary sector and bring about profound changes in the organisational structures of the NPAs, YHA and CNP.

By the end of the project, it will have delivered the following five changes:

- Greater leadership capacity across the BME voluntary sector
- Organisational change of the partners
- Established partnerships and relationships between the local BME voluntary sector and National Parks
- Community Champions influencing the National Park Authorities through both formal and informal decision-making fora
- Research into the transferability of the project to another target audience

The aim and objectives above will be delivered by:

- Recruiting and training Community Champions – influential leaders of ethnic minority communities – to promote the National Parks in their communities
- Nurturing local groups or “Clusters” of Champions in 20 urban centres, and helping these Clusters to become independent and self-sufficient after the end of the project
- Assisting the partner organisations in making organisational changes to better meet the needs of ethnic minority communities
• Providing a schedule of training opportunities, overnight National Park visits, workshops, feedback for cultural events in the National Parks.

Slide 18
It is a 2 Stage application process and we recommend that we have a conversation and dialogue with potential applicants to talk through the potential of the application be it a national or regional one before any submission. There is a national adviser to help with national projects and that is currently me.

We have a Regional Adviser in each region to help promote Access to Nature and to help develop projects and names are all listed on website. Their specific role is to work with applicants on developing projects – so do use them. There is a national project team to manage the project as a whole and to undertake assessments.

It is a competitive process. The first stage is an expression of interest stage and eligibility check. The second stage is a full application process with all supporting documentation.

Slide 19
It is an online application process both at Stage 1 and 2. You have to register first before you can get access to the system and then complete the Stage 1 application. All details and guidance notes are available on the website. Have been a few issues with the online system, but many issues are being ironed out.

Stage 2 applications undergo a thorough assessment process and all projects are put forward for decision to either the Project Board or the Independent Grants Panel – depending on the level of grant sought. Decisions are conveyed to applicants within 10 working days of meetings.

Slide 20
Latest situation - have hundreds of applications being worked on using the system. Following Stage 1 and 2 applications submitted at December 2008.

• 134 Stage 1 applications received. Over £35m grant requested with total project costs of £57m.
• 35 Stage 2 applications received. Over £10m grant requested with total project costs of £16m
• 9 applications decided to date
• Awarded £1.7m in 5 awards - 1 flagship, 1 national 3 regional (2 NW, 1 WM)
• Only 1 award less than £100,000
• 26 Stage 1 applications awaiting decision

The Panel and Board have awarded 5 projects to date with a value of £1.7million. I have used these as the examples of projects as discussed earlier – CSV Engage, Woodland Trust – Woodland Communities in Warrington, CNP Mosaic and Plantlife Wild about Plants. Also an RSPB project in Geltscaldale, Cumbria. 26 Stage 1s are awaiting decision and more than 20 Stage 2 applications.
It is a competitive process and we are getting a lot of applications – so we strongly recommend that you speak early to someone about a potential applicant to save wasting effort and to get the best projects.

**Slide 21**
For more information look at the website [www.naturalengland.org.uk/accessstonature](http://www.naturalengland.org.uk/accessstonature). It is updated regularly with the latest grants awarded, guidance notes, FAQs and Regional Targeting Plans. For publications and general enquiries pre Stage 1 please refer to Bss – the Lottery Advice line. **Bss Advice line 0845 3 671 671.** Do use the Regional Advisers – their names and contact details on website.
Countryside Recreation Network Seminar

"Rural Development Programme - England"

Chris Franklin
Rural Business Facilitator
Yorkshire Forward

No Paper available
This presentation outlines recent changes at HLF – its new Strategic Plan for 2008-2013, changes to the application process following consultation, and the changing funding environment.

Strategic Plan

HLF’s third Strategic Plan for the period 2008 – 2013, ‘Valuing our heritage: Investing in our future’, was launched in April 2008 and set out HLF’s vision as:

‘The Heritage Lottery Fund is the UK’s leading advocate for the value of heritage to modern life. The Fund sustains and transforms our heritage through innovative investment in projects with a lasting impact on people and places.’

HLF expects the applicant to define heritage and why it is significant to them, but generally it embraces natural and designed landscapes and bio-diversity as well as historic buildings, museums, libraries & archives, sites & objects associated with industrial, maritime & transport history, and people’s culture, traditions & language. (The Strategic Plan can be downloaded from the HLF website at www.hlf.org.uk.)

It is important to note that HLF grants expect to have an impact on people as well as places.

HLF’s strategic aims for 2008 – 2013 are:

- To conserve the UK’s diverse heritage for present and future generations to experience and enjoy;
- To enable more people and a wider range of people to take an active part in and make decisions about their heritage; and
- To enable people to learn about their own and others’ heritage.

These are very similar to the aims in the previous strategic plan period as consultation indicated that HLF was doing the right things for places and people, the wording has just been slightly re-focused. The second aim (the ‘participation’ aim) seeks to encourage non-traditional audiences for heritage, such as young people, disabled people and those from BAME communities. The third aim (the ‘learning’ aim) is mandatory and all projects have to meet this aim, along with one or both of the other two (e.g. conservation and learning, participation and learning or all three!).
Funding

In June 2006 the then Secretary of State announced that HLF would continue to distribute 16.6% of the ‘good causes’ money (Big Lottery distributes 50%, Arts and Sport distribute 16.6% each), which is 4.67p of every pound spent on the Lottery. It was also confirmed that HLF would continue to distribute Lottery money until 2019. So far, since the Lottery began in 1994, HLF has awarded £4.2bn in grants, an average of over £320m per year. However, three factors have affected future HLF awards budgets:

- HLF is unable to continue to commit more money than it receives in income;
- There is a Lottery contribution to fund the 2012 Olympics; and
- Income on Lottery balances in the bank is being redistributed amongst the Lottery funders.

HLF decided to absorb the impact of the additional Olympic funding loss over time beyond 2012, rather than having peaks and troughs, so the annual awards budgets are:

- 2008-09: £220m
- 2009-19: £180m

All existing awards are safe and there will be £1.9bn to distribute up until 2019, so with around £180 million a year HLF will still be by far the largest dedicated funder of the UK’s heritage.

Grant programmes

HLF has three general (covering all types of heritage) grant programmes:

- Heritage Grants – over £50,000
- Your Heritage – £3,000 - £50,000
- Young Roots – £3,000 - £25,000 (which is targeted at young people aged 13 – 25)

Your Heritage and Young Roots now start at £3,000 which means that applicants will still have access to small amounts of funds when Awards for All ends in March 2009.

There are also a number of grant programmes targeted at specific heritage sectors, including:

- Landscape Partnerships - £250,000 - £2 million
- Parks for People - £250,000 - £5 million

These are the same grants programmes as were available in the previous strategic plan period.
The grant budget of £180m per year has been allocated to each of the grants programmes as follows:

**Heritage Grants**
- Grants over £5 million – £20m
- Grants £1 million - £5 million - £38m
- Grants £50,000 - £1 million – £45m

**Your Heritage** – £16m

**Young Roots** - £3m

**Targeted programmes**
- Parks for People - £20m
- Townscape Heritage Initiative – £10m
- Landscape Partnerships – £10m
- Repair grants for places of worship – £18m

Obviously with only £38m to cover six decision making meetings per year, at each meeting only about £6.3m will be available for applications between £1m - £5m, so only a few grants will be awarded at each meeting especially if the grant requested is large. The funding environment is, therefore, becoming more competitive.

**Application processes**

Although consultation undertaken as HLF was developing its third strategic plan indicated that we were doing the right things for the heritage and people’s engagement with heritage, HLF was asked to make its application processes simpler and quicker. So in relation to Your Heritage and Young Roots applications, there is now a simpler application form, assessments will now be completed in 10 weeks as opposed to the previous 13 weeks and there will be help with project delivery through mentor support available as part of, and paid for from, the grant.

As regards Heritage Grants there have been a number of changes. There is no longer a single or two-stage process, rather all applications will go through a two-round process with a development period between the two rounds. Applicants will apply earlier in their project planning process so less work is required prior to putting in the first-round application which requires less information and fewer supporting documents. There will be a three-month assessment period before the application is put to the country / regional committee (which meet four times a year) and they will agree up to 20% more than can be afforded at that time. Part of the first-round application will be plans for the development period for which both development grants and mentor help are available – there will no longer be Project Planning Grants as this work will be undertaken during the development period.

For the second-round application the same on-line application form will be used and all applications must include an Activity Plan (replacing the previous requirement for individual Access, Audience Development, Learning and Training Plans) and where appropriate a Conservation Plan. An approximate 80% success rate is expected at the second-round. New guidance documents, including ones
on management & maintenance planning, sustainable resource use and evaluation are available on the HLF website, as are case studies.

Both Landscapes Partnerships (one decision meeting per year) and Parks for People (two decision meetings per year) applications also go through a two-round process.

Landscape Partnership projects must deliver equally across four outcomes relating to conservation, participation and learning:

- Conserving or restoring the built and natural features that create the historic landscape character.
- Increasing community participation in local heritage.
- Increasing access to and learning about the landscape area and its heritage.
- Increasing training opportunities in local heritage skills.

Parks for People projects must meet three funding criteria:

- the community values the park as part of their heritage;
- the park meets local social, economic and environmental needs;
- the park actively involves local people;

and deliver all five of the following outcomes relating to conservation, participation and learning:

- increasing the range of audiences
- conserving and improving the heritage value
- increasing the range of volunteers involved
- increasing knowledge and skills
- improving management and maintenance

Tips

All applicants are urged to complete the on-line pre-application form and send it to the appropriate regional / country team. This will trigger the conversation between the applicant and HLF staff – talk to us before filling in your first-round application! Considering the new funding environment, be realistic in how much grant you are requesting and secure as much partnership and match funding as possible.

Projects must have a heritage focus and all must meet HLF’s learning aim. HLF will not fund work which is another agency’s responsibility, core business and current staff, nor routine repairs and maintenance. Do show evidence of demand and support from the local community and that there will be sustainability beyond the end of the project.

Case Studies

Landscape Partnership case studies are available on the HLF website at:

http://www.hlf.org.uk/English/HowToApply/OurGrantGivingProgrammes/LandscapePartnerships/
Case studies for the other grant programmes will be appearing over the coming months so please keep visiting the website to check their availability.
Introduction
Over the last 15 or 16 years my involvement in a wide range of large and small partnership projects, all based on or around waterways, has confirmed to me the importance of demonstrating that mutual benefits will be delivered, thoroughly understanding the risks involved and ensuring a life once the capital funds have been spent. These are the three areas explored in this paper - **adaptability** - the way one project can deliver a whole host of benefits for quite disparate partners; **risk** - the challenges any project will meet and ways to deal with them and lastly **sustainability** - financial sustainability but also the role communities and the voluntary sector can and must play in the future of completed projects.

I'll also touch upon the importance of setting up a monitoring and evaluation methodology in order to prove the predicted outputs and outcomes have been delivered and provide the evidence for successive bids.

Most recently I have led projects on the Cotswold and Droitwich Canals and it is to these I will refer most frequently.

Adaptability
Funds are scarce and the bidding process is becoming increasingly competitive. Understandably then funders will want to know that your project is the best way for them to spend their money, that it produces sufficient outputs per pound, that you have looked at alternatives, if any, and that there aren’t other sources of funding available.

This is particularly so of waterway restoration projects as they are engineering heavy. Bridges have to be built, utilities moved and contamination remediated. None of which come cheap.

Lottery is not unique in generally wanting to be the funder of last resort. RDAs too tire of being seen as the obvious gap funder. All funders will want you to demonstrate that your project will deliver their outputs economically and effectively. Not only must you predict sufficient outcomes but show the mechanisms through which they will be delivered.

So what case can be made for waterway projects?

A popular misconception that has to be overcome is that “waterways are for middle aged white boaters”. Just 4% of waterway users are found on the water. The vast majority of users are on the land - feeding the ducks, taking a short cut,
commuting to work, jogging or just sitting and watching the world go by - "gongoozling" as it is termed on the canals.

Boats do play an important role. Much of people’s enjoyment comes from watching boats. Up to 40% on the Caen Hill flight of the Kennet and Avon Canal where immense satisfaction can be had watching people struggling with a staircase of 29 locks. Boats also create the working heritage, the chance to see 18th and 19th century technology used today just as it was then. That working heritage is important in making the case for restoration to navigation particularly if new construction is needed to create continuity.

Waterways are multi functional but most importantly they are local. They are akin to a national park on the doorstep with a million people living within 100m, 15% of the population within 1 mile, a third within 3 miles and half living within 5 miles of a waterway.

The network’s industrial heritage also means there is a strong correlation with areas of greatest need. Depending upon the measure used between 60% and 76% of the 50 most deprived districts include a waterway. Waterways therefore easily fit local, regional and national government agendas.

As waterways are, by their nature, linear they naturally connect communities, connect home with work or leisure, connect town and country and connect people with their cultural heritage. The towpaths are flat, level, traffic free and create a free route to the healthy outdoors, passing under roads, railways and other obstacles.

Waterways offer an amazing range of outputs which can attract funding from many different sources. They’re a catalyst for regeneration, they change perceptions, arguably one of the easiest ways to improve land values and justify changes of use typically creating an uplift of 18% in a pristine canal environment, they’re a facility for sustainable transport encouraging people to get out of their cars and onto bikes or their feet saving 100 tonnes of CO2 every year for each kilometre of towpath improved, they’re a way of getting people healthy creating up to £36,000 in annual health savings for every kilometre improved, not to mention the potential £100,000 to £200,000 of additional income generated through visitor spend, and on top of that there are the intrinsic benefits in conserving the natural and built heritage and the chance to use them to develop skills and deliver the national curriculum.

In addition we shouldn’t ignore the sheer “wow” factor of water, something Birmingham was the first to recognise as a unique selling point and more recently exploited superbly by Falkirk and Salford among others. Daventry, Grantham, Bradford, Swindon and the eco town at Marston Moretaine are just some of the places aiming to be the next generation of canal towns.

The second question that gets asked is why British Waterways?

Despite the fact that we only own around 5% of riparian frontage, our success as an exploiter of land and property around our waterways has perhaps
overshadowed our role as custodian and provider of public benefit. Some partners even question whether British Waterways is a deserving cause and believe we make money from restoring waterways.

Naturally British Waterways’ first responsibility is to maintain the existing waterways which generate public benefits through:

- **Use value**: £230m
- **Land drainage**: £67m
- **Balance of payments**: £30m
- **Volunteering**: £1.1 m
- **Freight**: £0.7m

Which adds up to around £330 million and in addition:

- **Intrinsic value**: £250m
- **Affordable housing – land foregone**: £5m
- **Uplift in property values**: £16m - £45m

Which adds up to another £300 million but there will be some double counting.

Finally health benefits of up to £120m are generated, although this will, at least in part, already have been captured in the “use value”. It is safe to say the waterways deliver at least £500 million of public benefit.

They also generate just under £1 billion of visitor spend which, taking due account of deadweight and displacement, supports around 22,000 jobs.

We receive a grant but that has been largely constant in real terms over the last 20 years dropping from 70% to 40% of our direct income. That real growth in earned revenue has arisen from our successful exploitation of the grim and largely hidden dowry land we inherited in 1968 to create publicly accessible, well used, attractive and vibrant waterfronts.

Absolutely every penny we earn we reinvest in the waterways, we do not distribute profits.

But it’s still not enough to sustain a 200 year old system amid rising expectations. Accordingly we have to be sure the schemes we take on don’t significantly increase our long term liabilities or compromise the sustainability of the existing network. However that real growth in earned income has given us the confidence and the flexibility to support projects where financial sustainability is uncertain.

Which brings me neatly to

**Risk.**

Risk comes in a number of guises but boils down to misunderstanding, drift, optimism and delay.

The general rule should be “no surprises”. Right from the outset everyone, at every level needs to know and understand what is expected of them and what it might cost. Every project needs a champion to drive it forward but they can’t be a lone voice. Everyone involved in the project, however minor they may think that involvement is, has a role in foreseeing and removing obstacles which could
impede progress. As one local authority partner said “people should ask forgiveness not permission”.

Everyone comes with their own agenda, way of doing things and requirements from the project. It is the project champion’s job to ensure the long term vision doesn’t get lost and to bring parties together to thrash out solutions to problems as they arise. Where partners have a regulatory role as well as a role in the project that relationship may need careful and imaginative management. For example on one scheme the Environment Agency has had to balance flood defence benefits with potential ecological and/or water quality losses. Local authorities routinely have to balance their planning role with their regeneration and project role.

Typically the availability of funding will mean detailed design will be undertaken during the project. That can be a problem if an EIA is necessary as well as planning consent as the level of detail normally required won’t be available. A planning application including the principles followed by conditions applied geographically overcame this issue on the Droitwich Canals. Conditions are being discharged as and when each section is designed.

Sometimes the only way to resolve differences of opinion is to put everyone in a room with a skilled facilitator and people from each organisation having sufficient authority to agree a pragmatic way forward. This worked well with a partner regulatory organisation. Sufficient agreement was reached to allow a funding application to be submitted with unanimous support. The process also worked where it was essential that seventeen community and public stakeholders gained an appreciation and understanding of each other’s objectives, areas where they were mutually supportive or not, and the technical issues and constraints. An acceptable methodology and content for public consultation was agreed following a series of workshops. Sadly two of the community organisations, who agreed the methodology and took part in the consultation process, disagreed with the public’s response and continued to campaign.

Match funding is invariably required and inevitably there will still be a funding gap when the project starts. Typically around 10% of project costs will be covered by uncommitted funds or funds which will be raised during the course of the project.

Which brings me to drift or project creep.

Filling a funding gap means an ever widening search for cash which can too easily lead to a loss of focus on the need to fund core project costs. As a rough guide the 80/20 rule can be applied; 20% of additional works is acceptable if it also secures 80% of core funding but only if that 20% is free from unacceptable management or future costs.

Non core outputs may best be delivered by another organisation. Support was gained from the Learning and Skills Council for the development of traditional building and rural skills to be used on our project. This led to the establishment of The National Heritage Training Academy (South West) which then played a useful part in delivering project training outputs. Specialists Gloucestershire Setpoint and the University of Gloucestershire were to deliver educational outputs and links with
STEM subjects on our Big Lottery Fund (BLF) Living Landmarks bid. We both needed the same outputs but they had the expertise in that field.

The opposite of creep is contraction. On the Cotswold Canals Heritage Lottery Fund initially deferred their decision and asked us to resubmit our bid for half the sum originally requested. Half the canal would then be restored and that half had to contain the outputs the funders needed; heritage structures, brownfield land, jobs, etc. That half was landlocked rather than connecting to the canal network. The illogicality from a navigation perspective resulted in some flak from the enthusiastic volunteers and some councillors.

Match funding from a range of sources carries its own risk that delivery programmes can run out of sync. Our European funding on the Cotswold Canals project was agreed before HLF deferred. As a result our European lead partner became more and more anxious as the start date on site receded. It all ended happily to an agreed albeit extended deadline.

Funding application processes themselves can take a considerable time, particularly where larger sums and complex schemes are concerned. Over that time funder priorities can change.

Dialogue with the funding body has proved invaluable both in making sure the potential project meets the funder’s needs and in recognising emerging themes. We were able to anticipate HLF’s increasing interest in heritage skills development and make it a significant part of the application. A deep understanding of the project and the level of support encourages funders to be flexible where practicable. For example SWRDA were able to switch their funding from works to land acquisition as their priorities changed.

Challenge funding, such as the BLF’s Living Landmarks, has been more difficult as the information contained in the guidance is all there is. However the simplicity of the initial stages minimises wasted effort. Although for Living Landmarks, having cleared the first hurdle with a simple 10 page application, it soon became apparent that the assessors wanted to see multiple volumes of supporting evidence during their visit. The visit was just a couple of few weeks after the announcement so there was some very hasty scribbling.

Nevertheless we were successful in winning development funding. Even though the second stage bid was ultimately unsuccessful the development funding moved the project forward. All the contacts and connections made remain and can still be called on and the work done will be repackaged as other funding opportunities arise. The only downside was the raised and then dashed hopes of the community as the timescale moved from the hoped for sprint to a marathon once again.

Optimism is an essential ingredient to any project. Optimism Bias is the demonstrated, systematic tendency for project appraisers to be overly optimistic about project costs, duration and benefits. The Treasury's Supplementary Guidance on Optimism Bias recommends that project appraisers should make...
explicit adjustments to the estimates of project costs, benefits and duration based on empirical data to inform project decisions.

The upper bounds for non standard civil engineering projects are 25% for works duration and 66% for capital costs at outline business case stage¹. Bear that in mind as once an application has been lodged with a major funder the funding is fixed. If costs rise so does the funding gap.

Two stage application processes do allow risk areas to be explored in more detail before the stage 2 submission. However there is no guarantee that funding will be increased and allowable contingency levels are still miserly given the general level of project development.

At every stage there should be a risk register identifying the risks to project delivery to time, quality and cost. Each risk also needs an owner.

One partner may well have a better understanding or ability to respond to a particular risk. In which case, ideally, they would be the owner of that risk and take responsibility for managing it out. For example where the success of a project is dependent upon redevelopment and/or change of use it will be the local authority that has to make the case for change and put in place the necessary planning and regeneration policies. They are then best placed to manage that risk and its financial impact.

The major impact of most risks is delay.

Delay immediately translates into increased cost; infrastructure cost inflation was until recently 6% per annum, overheads such as the delivery team are incurred every day the project is on site, a shift in timetable may incur new ecological issues, such as wandering slow worms, which then introduces even more delay and expense. Planning and other consents may well be understood but the impact of ecological management and mitigation can have as much if not a greater impact.

The potential impact of delay has to be made clear to and understood by the partners.

Negotiation of funding or other legal contracts can easily become protracted, particularly if more than one partner has to sign or if side agreements are needed. The question then is do you wait until all the funding contracts are signed, in which case inflation will take its toll, or do you crack on in which case your cash is at risk? Key partners may be prepared to allow draw down of their funds in advance of funding agreements being completed in which case works can progress. Alternatively one partner may be prepared to fund preparatory works at risk, perhaps with a skeleton team. Having had my fingers burnt I cannot recommend the latter route.

On the Cotswold Canals the HLF Trustees were concerned that the context, what happened around the waterway post restoration, wouldn’t complement their

¹ http://www.hm-treasury.gov.uk/d/5(3).pdf Supplementary Green Book Guidance - Optimism Bias
investment. Quite reasonably contract conditions were included requiring Design Guidance and an Area Action Plan to be completed. As a result the local authority had to be a signatory to the contract significantly delaying its completion.

Both RDA and Lottery have clawback provisions should their outputs not be met. In the case of the RDA this may be some years beyond the physical completion of the project and be reliant upon private sector investment creating regeneration. All of the funds will have been spent but because the outputs have not been achieved the signatories may have to pay back a proportion or all of the grant. Grant making bodies have to act reasonably and a judgement has to be made as to what this means to you. What can you deliver and what will you influence using your “best” or “reasonable” endeavours? This needs to be specified in the contract.

Whatever the published funder objectives, when there are two (or more) equally good projects competing other criteria will come into play. BLF was about community participation and capacity building in areas of greatest need. We did very well to get as far as we did given we were in an area of relative rather than absolute deprivation, but at the final interview we were asked about the number of jobs we were creating per £ invested. Not a specific output sought but clearly a criteria when weighing up excellent but competing projects.

The competing waterway project had both greater deprivation and regeneration potential but it also had the iconic Kelpies. Don’t underestimate the power of a lasting and very physical memento of the funder’s input. The Falkirk Wheel created a focus and image for the Millennium Commission and the Kelpies have done the same for the Helix project and the BLF. Like the Angel of the North these creations can also play a significant and lasting role in changing people’s perceptions of an area.

**Sustainability**

Assuming all goes well and the physical project is completed on time, to quality and to budget how can you be sure it is sustainable?

Projects improving the public domain invariably result in an uplift in land values. The public sector has taken the risk and the private sector may then reap the benefit. Consideration needs to be given at the outset to ways in which later developments can either contribute to the project directly or to future maintenance, particularly as developments may well take place beyond the grant end date. Supplementary Planning Guidance was used in advance of the Droitwich Canals project and Masterplanning leading to an Area Action Plan was begun on the Cotswold Canals project to help create this payback and to ensure delivery of the RDA’s required outputs.

Financial sustainability is a key criteria but the local community also has to value what has been created. This is particularly important if continued public funding is going to be required.

Freemen Tilden said “through interpretation, understanding, through understanding appreciation and from appreciation protection”. Interpretation is, in essence, story telling. It’s the process of explaining the significance of a site and
revealing why and how a place is important to the individual. This is as important for partners and participants as it is for visitors. It can also be achieved by doing, as much as by seeing.

At the development stage leading to the stage 2 HLF application on the Cotswold Canals project we asked Community Service Volunteers (CSV) to look at ways in which we could ensure community participation. They found that whilst there were opportunities for volunteering, there were few managed opportunities. There was insufficient promotion and support both for the volunteers to get the most out of the time they put in and for the host organisations to get the most out of the volunteers. CSV did find a high level of interest in the project but they also found a high level of ignorance of what was happening and how people could get involved.

As a result two dedicated members of staff were included in the second stage application; one to create the opportunities and connections, the other to manage the works on the ground.

Training was seen as key in ensuring the community groups had the necessary skills and knowledge required to conserve the natural, built and social heritage. We wanted to create the skills but most importantly the desire within the community for it then to play a significant, even a leading role in continuing what the partner funding had begun and to make a substantial contribution to the long term operation, management and maintenance of the waterways.

Just because someone is unpaid it doesn’t mean they are unprofessional. Where specialist skills already existed those volunteers were able to contribute from day one. Available skills ranged from archaeological recording and research to tree felling and thinning.

Recording and collating input from volunteers can be difficult as the people involved are often averse to what they see as “bureaucracy”. However it is absolutely essential in ensuring that their contribution is valued and above all recognised.

Volunteer input can be substantial. In just a year and a half the two Cotswold Canals team members mentioned above delivered over 1000 volunteer days including 364 days training for 223 individuals on 13 different courses. This was worth £67,000 in match funding to the project and saved £15,000 in contract costs on one job alone. The volunteers ranged in age from 11 to 80 and included the local canals trust, employee volunteers, work placements, youth groups, prisoners from HMP Leyhill, drug and alcohol rehabilitation and reintegration groups, schools, BTCV, WRG and many more. A similar contribution has been made on the Droitwich Canals project where 1200 volunteer days worth £77,000 and 164 training days for 93 people have been delivered to date.

Community bodies are not homogeneous and not everything can be expected to go well. It is too easy to underestimate the power of the motivated individual or group which, if not harnessed and used to drive the project forward, will at best be wasted and may even be used to undermine partner confidence or encourage an
objection from a statutory body. Objectors will write to funding bodies and it is as well to be aware of this and to put it in context at the outset.

In the case of waterway projects it’s normally the case that the voluntary sector has been both the lead, often for over 30 years, and the driver for the involvement of British Waterways. Members of the canals trust can play a key role in increasing capacity among their own members, fundraising and undertaking interpretation and other works but you may find some are quite narrowly focused on navigation and uncomfortable in taking a partnership rather than lead role.

On both the Cotswold and Droitwich Canals projects we set up specialist groups bringing together the public and third sectors to deliver training and skills development, interpretation, communications, ecology and built heritage. The heritage group for example comprised English Heritage, the County Archaeologist, District Conservation Officer, BW Heritage Advisor, local Society of Industrial Archaeology and the local Canals Trust. These groups mostly worked very well with valuable contributions from both sectors.

Site visits by funders are, in my view, invaluable. They give the communities voice and allow their passion, need and desire for the project to be conveyed to the funder. What’s more misconceptions can be challenged, for example on the Cotswolds we were able to show Trustees areas of industrial neglect far removed from the popular “chocolate box” image.

Imagery always needs to reinforce and reflect the project purpose. It is all too easy to talk about the community, young people and inclusiveness and then pack presentation material and meetings with “experts” - still too often people in suits. BLF funded the creation of a short project video and their trustee commented that, given the emphasis on the community, there were very few if any that actually included even one young person explaining why the project was important to them.

**Evidence**
Collecting data to quantify the long term outputs of the project is essential as is a robust base line to set it against. This will be your evidence for the next round. As funders move to outcomes rather than outputs this evidence will increasingly come from longitudinal studies.

Third party project funding will probably run out the day the work is physically complete so you need to consider who will pay for these studies. British Waterways would normally carry out an immediate post project appraisal and then undertake further reviews at 5 and 10 years. Evidence from these studies, and regular user and neighbourhood survey work, provides the foundation for applications such as the ones I have talked about.

The evidence needs to be presented in a way that is recognised by the recipient, for example mapped against their own strategic priorities or an independently recognised format such as Defra’s “Quality of Life Counts” framework.
Conclusion
Waterways have been incredibly successful in attracting significant funding because they are proven to reliably deliver a wide range of outputs and outcomes which satisfy funders’ criteria.

Whatever the project there has to be a very clear goal - what you want to do, what can be compromised and what cannot. Only then can you look for suitable funding sources. The scale of available funding may mean that goal has to be achieved in stages and those stages may need to fit funding criteria rather than the logic of the project.

Major funding applications take time and will always require a commitment from a broad range of partners from the public and third sector. That commitment must include a willingness to be pro active in removing obstacles and in accepting an appropriate share of the risk. Risks need to be thoroughly understood and managed throughout the project; be realistic about what can be achieved and the constraints the funding applies.

Community support is a necessary and powerful ally but the relationships within and between groups can be complex and need to be well understood and managed.

Recording and measurement, including a robust baseline, are key in delighting your current funders and set the foundations for the next project.

You will need patience and fortitude but it's worth it.
My role is part of the Business team of the service which covers Administration and Finance, Marketing, Information and Interpretation.

Responsible for:
Business Planning – Writing the service business plan, ensuring inclusion of higher level plans, influencing strategy and policy regarding the sector
Performance monitoring – Ensuring the service meets its targets not only in our own business plan but those in higher level plans
Fundraising – Identifying projects within the service that require funding, being aware of current funds and applying for them, either individually or in partnership with other organisations.

The rest of the service is made up as follows:

**Community Greenspace Team**
The Worcester Wardens Partnership is a partnership between organisations in the county that works with volunteers that has developed best practice, a Volunteer Charter, sharing training courses that are run by organisations. This ensures the volunteers feel like part of a ‘family’ and an annual thank you event is held.
Fruit tree scheme – Scheme to promote local varieties of fruit tree, we offer advice about what tree would suit your garden and trees can be purchased directly from the countryside service.
Advice to communities – The team advises communities on how to apply for grants to create their own greenspace and helps with applications.

**Access Team**
We have an improving BVPI 178 (foot paths ‘easy to use’) score – currently 73.5% (on approximately a 2% increase each year)

We maintain and develop waymarked trails such as - The Worcestershire Way, part of the Severn way runs through Worcestershire, maintaining them to high standards. Currently the area of development is on waymarked circular walks.

The team facilitates the Parish path wardens scheme. The wardens walk their stretch of paths and report problems and carry out minor maintenance work.

Access for all – Intellectual and physical access, theme that runs through everything we do, e.g. gaps and gates instead of styles, information provision, what language we use, where we distribute.
Health Walks – PCT and Natural England funded project across the country, we have dedicated Health Walks officer, who sets up regular walking groups and training for health walk leaders and works on getting walking on the list of health professionals prescriptions of choice.

Gypsy Service Team
Provide and maintain residential gypsy sites
Dealing with unauthorised encampments -
Service self funded through rents

Business Team
Marketing – the fundamental elements of marketing is market research and community consultation through which we keep in touch with what people want and need.

Information and Interpretation - We know that getting information provision right is absolutely critical in reaching as many audiences as we possibly can i.e. market research always ranks “more/better information” as the thing which is most likely to encourage them to access the countryside more.

How we work
Our work fits in with the bigger picture. We don’t make it up! We combine relevant policies and strategies with the needs of the community and would hope those strategies contain the needs of community but sometimes it is a question of adding a local spin on a national policy.

Planning – take in account policy, strategy and needs of community and working into a planning framework.

• 5 year plan of what we are going to do, with available resources
• Wish list of what we’d like to do if more resources
• That then is the backbone of our fundraising strategy

Current LA Climate
In Worcestershire, 25m shortfall over 3 years - Salary spend increases, electricity / fuel costs have increased, we are looking after more elderly than ever before. The service is funded by government and so an increase in council tax would not have much effect on our budget.

This position is more or less the same across the country and all countryside services are being affected, some quite dramatically. We are at the point of looking at staff and budget cuts with resulting impact on service provision. Some services are, rightly, protected from cuts, e.g. social services, children’s services and therefore increases the impact on other services e.g. countryside. Politics – elected members have difficult decisions to make and it’s understandable though very frustrating when funding is spent on services other than those for which is was intended. This isn’t a real example but the way to think of it is, do you keep a school open or fund the countryside service’s diversity agenda?
Statutory – Very little of what we do is statutory (some statutory work within ROW) something that, in our experience, funders sometimes don’t understand

**Our Funding Story**

At one time, a significant chunk of our funding came from Countryside Commission which funded core work, including staff, maintenance of country parks, development and maintenance of rights of way, development and maintenance of information and interpretation etc.

As this reduced, we began to focus on more project based one-off grants, particularly lottery, this enabled some very successful projects but was extremely costly, particularly in staff time, often diverted us from what we ought to have been doing and led to an imbalance between maintenance and development, i.e. Funding was only for new ‘innovative’ shiny things.

We have refocused our aims and have redressed the maintenance / development balance and this, particularly after some extremely frustrating grant application experiences, has led to the emphasis of our fundraising moving away from grants and onto more local income generation e.g. promoting areas of the service which generate income such as room hire, ensuring they are used to full capacity, corporate activity days where companies spend one part of the day having a meeting and the other doing some practical maintenance work, hedge laying, coppicing etc, community advice (charging for advice, first hour free etc) fruit tree scheme promotion, and back to looking at local sponsorship.

The good side of local income generation is that it can be more flexible where it’s spent, downside that it’s more easily pinched.

This is crudely the way it has gone but there has always been a bit of a mix of all of the above.

**Successful projects**

In the middle ‘grant phase’ we have had some notable successes

Countrywide Agency grants were fantastic. There was minimal red tape, they were funders who really understood the sector, had an extremely helpful and positive attitude, appropriate flexibility regarding what could be funded, led to, for example some of the most popular grant funded work we have ever done, i.e. regeneration of country parks.

Pershore bridges project combined genuine built and social heritage with countryside access and interpretation. Full Heritage Lottery Fund bid of £350k Worcester Woods Info/interp project – enabled a mixture of new and old technology to be utilised. Combined with a re-vamp of the whole site Funds from the ODPM’s Liveability - £3.5 million to upgrade 20 sites in Worcestershire £420k for Worcester Woods.

Community Liaison Officer – Made huge strides in connecting with parts of the community we hadn’t previously reached. However, it was largely our inability to secure funding to continue this work which changed our view on applying for lottery funding.

Gypsy site refurbishments – CLG 75% funding for upgrading of 3 sites.

So, we have been successful in securing funds and delivering a range of projects, however……………….
Frustrations
There have been a number of frustrations. We know that funders have become aware of some of these and that some have improved but here are our experiences:
Goal posts have moved during both the application process and on occasion during project implementation with a danger that the project ceases to meet our aims. Funders sometimes strongly give the impression that it is their aim to not spend their grant money. There has been a reluctance to help improve the bid. One or two people we dealt with had pretty poor/ arrogant attitudes.
•Judging early stage applications clearly done by someone reading a crib sheet and ticking off criteria.
•Some funders have failed to understand that the extent of the catchments area of a project
•Grants only available to communities inevitably go to the same old limited number of groups i.e. those with a capable individual(s), Local Authorities are in the best position to help funders reach communities that may be missing out.
•A lot of what communities need has already been identified and isn’t necessarily new, ‘innovative’ e.g. previous successful work on the diversity agenda has clearly demonstrated what needs to be done in the future but this is not considered to be ‘new’ and therefore eligible - what would be truly new and innovative would be funding for areas of work which we already know would be successful in meeting our aims and those stated by a number of funders without the need to play silly “pretending” games.
•Exit strategies - If we could possibly get funding internally and avoid the need to endure the pain of the grant application process we would certainly do so. Again it would extremely refreshing to have an open and honest discussion with funders about this and for funders to be realistic about the extent to which a project needs to and can be continued. If the requirement is for LAs to keep the project going at full steam then forget it. Is it better to do the project for a while and do your best to do the core of it after funding or not do the work at all?
•It’s clear that funders either don’t know how local authorities work or even worse they have a misinformed impression. E.g. what is a statutory duty, exit strategy, misconception that funders are better in touch with the needs of communities than local authorities are, that funders are in a better position to work directly with communities than LAs are.
•A recent application we submitted seemed to have huge amounts of duplication and we were asked to provide additional information which we had clearly already given.

Current Position
At one time funding dictated what we planned to do (we went where the grants were), now we know what we need to do (always open minded though) and so only consider grants if they’ll help us meet our aims and meet our criteria e.g. ones above.

Having spent many years feeling like we are in the dock being cross examined by potential funders, we feel that the roles if anything are reversed. We haven’t
turned our back on grant funding opportunities entirely but we feel we are in a much better position to identify those which will genuinely help us to help the communities of Worcestershire.

In the meantime we will continue to play an active role in a range of partnership grant bids whilst focusing our own fundraising efforts on more local income generation projects.
1. Introduction
In a context in which there is excess demand for project funding and a finite supply of such funding, the 'market' adjusts by pushing up the price. In practice the price is often the criteria by which applications are judged and often relates to concepts such as economic appraisal and cost benefit analysis. This combination of factors creates a situation whereby in order to convince funders of the merits of a particular scheme, favourable supporting economic data is required to support applications. Thus an agenda is introduced whereby those bidding for funds need to demonstrate the added value of their projects.

Assessing the economic benefits of investing in countryside recreation amenities and events is a relatively new discipline for managers and is typically subcontracted to consultants with an "expertise" in the subject. However, in order to be able to draw up a brief for consultants, to work with them as an equal partner, and to have confidence in the end results, requires a familiarity with the rationale for conducting such studies and the techniques used. The starting point must be a clear idea of why you are committing resources to an economic appraisal and how you plan to use the results. Economic appraisals sometimes suffer from a lack of credibility because of some of the following problems:

- inappropriate methodologies;
- over ambitious assumptions
- exaggerating the positives;
- ignoring the negatives;
- political interference; and,
- using the results for purposes for which they were not designed.

2. What is 'Best Practice'?
In the UK, where considerable amounts public money are used to invest in facilities for sport and leisure including countryside recreation, guidance has been provided by HM Treasury to government departments on how to appraise policies, programmes and projects on a before and after basis. This guidance is known as the 'Green Book - Appraisal and Evaluation in Central Government' (2003 edition). Use of the Green Book is mandatory for government departments and executive agencies. However, the principles used within the Green Book are widely regarded as best practice within public life and are also adopted by bodies which do not have a statutory obligation to use them. The central tenet of the Green Book is to enable actions (normally investment decisions), to be justified using recognised best practice techniques.
Each government department is free to adapt the Green Book to its own particular needs so long as consistency is maintained. The Department of Culture, Media and Sport has produced its own guidelines entitled 'The White Book - DCMS guidance on Appraisal and Evaluation of Projects, Programmes and Policies' (December 2004). The key point of note from the White Book is the need to demonstrate the 'additionality' of projects. In this context 'additionality' is taken to mean the extent to which an outcome is genuinely caused by some action. One feature that is consistent between both the 'Green Book' and the 'White Book' is the so called 'ROAMEF' model whereby all investment decisions should be subjected to consideration of the following:

- Rationale;
- Objectives;
- Appraisal in detail;
- Monitoring;
- Evaluation; and
- Feedback.

By adopting the principles of best practice, it then becomes possible to make an assessment of the cost of investment decisions and the full range of their benefits. This in turn enables funds to be allocated to projects on a rational basis whereby those projects which deliver the best value for money have higher priority in the pecking order for the limited supply of funds.

3. How can economics make the case for investment in countryside recreation?
There is a logical commonsense sequence of events which illustrates how investing in countryside recreation projects can have positive economic benefits. This sequence is outlined below.

1. Investment in a countryside recreation resource can lead to an increase in economic activity by attracting visitor spending from outside the local area.
2. If this additional economic activity is sustained, then positive economic benefits can accrue.
3. The best measure of an increase in sustained economic activity is an increase in household income i.e. the amount of this economic activity that is retained within the local economy.
4. Increased household income can lead to enhanced employment opportunities if the enhanced local income is spent locally;
5. New jobs can materialise after ‘slack’ has been taken up such as when those in receipt of the increased economic activity can no longer cope with increased workloads and need to expand their businesses to cope with demand.

Economic benefits in terms of hard cash are not the only benefits of investing in countryside recreation. There is an increasing realisation that active recreation in the outdoors can contribute to:

- the physical and mental health of the nation;
• the increased productivity of the nation's workforce;
• sustainable transport initiatives; and
• increased community cohesion and social capital.

The key challenge is to use credible measurement techniques to capture the value of the full range of benefits attributable to an investment decision. This in turn will ensure that applications for funding are presented in the best possible light compared with ‘rival’ bids. It therefore follows that to capture the information required to make an application convincing, requires the development of an appropriate brief to provide the necessary evidence.

4. Developing the brief
In essence, developing a brief requires an outline understanding of economic appraisals so that the required outputs can be operationalised. If the skills for such work do not exist in-house, external consultants should be able to lead and advise on the more technical aspects, the methodological implications and the strengths and weaknesses of the findings. However as a bare minimum the following points should help to clarify thinking:

• Be clear about what it is you want to measure;
• Be clear about why you want the data and how you will use it;
• Seek views (via consultancy tender documentation) concerning the optimum methods to collect the necessary data to meet the aim of the study bearing in mind the resources available;
• Don't allow yourself to be baffled by science - if you don't understand what consultants are doing or saying you can rest assured that other people who are dependent on the results will be in the same position.

Finally, always remember that the output of an economic appraisal is an estimate and that the whole process is as much art as it is science. Consultants don't have to live with the consequences of their estimates but you do! Keep it simple, know what want and make sure that your consultant delivers.

5. Vetting consultants

• What is their track record on similar projects? Are you seriously going to spend good money on novices who will need a massive learning curve?
• Who will be the named staff, what are their credentials and who will personally own the project for you?
• What is the required input from the client?
• Is there evidence of a clear fee structure, a time line, and an outline of who will do what, how long will it take and what it will cost?
• Does the consultant have the capacity to meet your deadline?
• What quality assurance does your proposed contractor offer?
• What is their history on cost over runs and unforeseen little extras?
Why hire company X and not company Y? What makes your preferred supplier so special that you want to engage them rather than any other applicants?

Don't doubt your own commonsense judgement. If the claimed economic appraisal of an investment decision doesn't 'feel' right, then it probably isn't right!
**Synopsis**

This talk explores the different ways that monitoring and evaluation is central to HLF’s work – both for “proving” impact and value for money and for “improving” by identifying lessons and best practice. It will also explain new monitoring and evaluation requirements brought in with HLF’s third Strategic Plan (SP3) and particularly HLF’s commitment to self-monitoring and evaluation by projects. HLF has seen that projects that embrace monitoring and evaluation, define their objectives at the beginning and measure their progress on their way, are much more likely to stay on track and achieve success. If evaluation is restricted to reviewing impact and outcomes at the end, it will be much less effective and influential than when a story of change is considered right from the beginning. For this reason, HLF projects are being encouraged to make monitoring and evaluation a central part of project design and delivery. Since April 2008:

- monitoring and evaluation plans are required at the application stage
- Between 1 and 3% of a projects grant award may now be allocated to M&E costs
- the final 10% of grant awards is dependent on submission of an evaluation report

**Demonstrating Value and Impact**

As a national lottery distributor, HLF must be able to demonstrate the impact of its funding. HLF funded projects should all make a positive difference - to heritage of course, but beyond this, they’re expected to all have broader social benefits and often economic and environmental outcomes. HLF must show how funding is meeting the three strategic aims of the organisation – that grants are helping to conserve heritage; that projects are getting more people involved and creating learning opportunities. We must also show HLF is responding to the financial and policy directions set by the government. For example, HLF must support projects that inspire children and young people; further the objectives of sustainable development and reduce economic and social deprivation.

This is the proving role of monitoring and evaluation and for HLF and the heritage sector as a whole, it is vital. For projects, robust monitoring evidence and a convincing final evaluation report is one of the best ways of demonstrating success, impact and value for money. With the current economic downturn, the value of this is more apparent than ever.
Importantly, projects that gather reliable data and evidence can also provide evidence to support advocacy for their sector. Jenny Abramsky, HLF’s new chair, said at her first speech to Heritage Link, the lead forum for voluntary organisations in the heritage sector - “we need facts and research, to use to tell the story to others, to develop a narrative for the value of heritage to modern life.” We need to get the benefits of heritage funding into the public consciousness, and appreciated by decision makers so when challenges like the current credit crunch or other competing demands for funding crop up, it is not the automatic assumption that heritage funding can be cut back.

A good example of collective data and evidence gathering transforming policy at a national level concerns funding for public parks. A huge amount of progress has been made in the last decade in capturing the value of parks to local communities. HLF took a lead role in encouraging this research, and thanks to evaluations by individual projects and major studies by academic, voluntary and government organisations, we are now able to draw on a strong body of convincing evidence. Partly as result of such research, the sector now has its own government sponsored lead organisation – CABESpace and the twenty years of declining investment in parks, starting in the late 70s, has come to an end.

**Learning, Proving and Succeeding**

There is a second and equally vital purpose for monitoring and evaluation though, and in some ways it is more inspiring. It is about “improving” rather than “proving.” At HLF we use research and evaluation to modify and refine our programmes, to change our practices and procedures, to inform guidance notes for applicants and to shape our application materials. It is natural to look back on a journey and wonder if you could have made it better. “Monitoring and evaluation” is simply about formalising this process - making it robust and follow sound social scientific principles. This way, rather than just helping the individuals involved in a project build up useful experience, they can share their lessons within their organisation and beyond. They can of course, also contribute to the body of “proving” evidence just discussed.

The new M&E requirements brought in with HLF’s third Strategic Plan are aimed at encouraging projects to take responsibility for their own monitoring and evaluation and to ensure it is tied in with project design and delivery – not bolted on at the end. M&E plans and baseline data are being requested at the application stage and a final evaluation report is required before the final 10% of a grant award can be paid. At project completion we also ask all projects to feedback a generic set of data covering the activities they ran, the volunteers involved in their project, visitor numbers and training. We know all this work has costs — and we will fund M&E work on a project, to a value of between 1 and 3% of the total HLF award.

We’ve also produced evaluation guidance which is available on the HLF website. This includes suggested research questions, an evaluation report template and links to straightforward toolkits including two ready made 2 hour evaluation workshops.

Projects need to show their impact against HLF’s strategic aims and against the particular outcomes of the HLF funding programme they are in. They will also have their own unique objectives and for this reason, they need to develop their own monitoring and evaluation plans. There are however, standard monitoring and evaluation frameworks that can be used and adapted - suggestions are included in the guidance document.

For two programmes, particularly relevant to the CRN, external monitoring and evaluation support will be offered to projects. This is at an early stage for the Landscape Partnership Scheme, but for the Parks for People Programme our consultants, Hall Aitken and Community First Partnership, have developed an evaluation framework for all projects to use, based on the five outcomes expected for all projects in the programme. Projects are able to access the framework and all of the guidance documents, tools and reporting templates from a website www.parksforpeople.co.uk

This talk has focussed on monitoring and evaluation that we want to encourage from projects. On top of this, HLF has a rolling research programme of its own, looking at the impacts of our HLF funding. This includes annual visitor and neighbourhood surveys, programme evaluations and outcome themed research on social Impacts, economic impacts and conservation outcomes. The research reports are available on the HLF website and they include detailed methodology sections which can be useful for projects developing their own M&E plans.
APPENDIX A
Countryside Recreation Network Seminar

"Supporting Outdoor Recreation - The Changing Funding Environment"

PROGRAMME

9.30 Registration and refreshments

10.00 Introduction & welcome from Chair

THE FUNDERS PERSPECTIVE

10.15 Access to Nature Sarah Preston, Natural England

10.45 Rural Development Programme England Chris Franklin, Yorkshire Forward

11.15 Refreshments

11.30 Heritage Lottery Fund - Funding for the Future Tony Crosby, Heritage Lottery Fund

12.00 Panel Q&A session

12.30 Lunch

PRACTICAL EXPERIENCES OF FUNDING RECIPIENTS

Sessions to cover, as relevant:-
- Partnership working
- Community engagement
- Monitoring and evaluation considerations
- Challenges in securing and managing funding

13.15 British Waterways Andrew Stumpf, British Waterways

13.45 Local Authority Representative Rebecca Pell, Worcestershire County Council

14.15 Panel Q&A Session

14.35 Refreshments

APPRAISAL AND EVALUATION

14.50 Overview of Appraisals Pr Simon Shibli, Sheffield Hallam University

15.20 Monitoring and Evaluation Isla Campbell, Heritage Lottery Fund

15.50 Panel Q&A Session

16.10 Summing up and close
APPENDIX B
Countryside Recreation Network Seminar

"Supporting Outdoor Recreation - The Changing Funding Environment"

SPEAKER BIOGRAPHIES

CHAIR

Glenn Millar
Economic Development Manager
British Waterways

Glenn Millar is Economic Development Manager at British Waterways. Glenn has been with British Waterways since 1978, initially working in freight transport and then recreation & tourism research. Glenn now heads up a small unit responsible for:-

- assessing the economic and social impacts of waterway projects;
- securing external funding to support such schemes; and
- developing and managing projects under various EU trans-national programmes.

From 1994 to 1998, Glenn was Vice-Chairman of the Countryside Recreation Network. He is a member of the PIANC (Permanent Association of International Navigation Congresses) Working Group concerned with Economic Studies on Inland Waterways and is one of British Waterways’ representatives on Voies Navigables d’Europe (VNE), a consortium of European inland waterway authorities with interest in the development of canals and rivers for tourism and heritage.

Glenn holds a B.Sc. Hons in Geography, a M.Sc. in Town & Country Planning, a Diploma in Management Studies and a Diploma in Marketing.
Sarah Preston
Grants Officer
Natural England

Over the last eight years, Sarah has worked on several grant programmes managed by the Countryside Agency, English Nature and Natural England. These include Active Communities Grants, Wildspace!, and more recently Access to Nature.

Previously Sarah spent 17 years working in the rural voluntary sector. She has been involved in the set-up of the Access to Nature programme, in particular working with Big Lottery on due diligence, developing the assessment process, grant documentation and manuals. From the launch in April, she has been the Grants Officer covering the South East and London regions and national adviser for national and flagship projects.

Chris Franklin
Rural Business Facilitator
Yorkshire Forward

Chris was brought up on a farm in the Midlands and has worked in agriculture and the agricultural supply industry since graduating in the early 1980s. Chris has worked as a Rural Business Facilitator for Yorkshire Forward since April 2008, helping rural businesses access funding for the growth and development of their activities.

Prior to this Chris worked for the Business Link network in South Yorkshire for five years, again assisting rural businesses to access funding for business growth and development.

Tony Crosby
Policy Advisor - Participation and Learning
Heritage Lottery Fund

Tony works in the Policy & Strategic Development Department of The Heritage Lottery Fund as Policy Advisor – Participation & Learning. He has worked for HLF for six years having previously worked in social services with disabled people. He specialises in disability issues, providing guidance, advice and training to staff and applicants on making all forms of heritage more accessible for disabled people and also on how disabled people can explore their own heritage and social history. He is currently leading on exploring the health and well-being outcomes of HLF funding. Tony is the HLF representative on the Countryside for All Forum.
Andrew Stumpf  
**Strategic Project Manager**  
**British Waterways**

Andrew has worked for British Waterways for over 30 years, 13 of which were in an operational role managing and developing waterways with the help of a range of partners. During the construction of the Millennium Link he was responsible for the management of Scotland’s canals which included ensuring that the first opening events and the transition to operation of the Forth & Clyde and Union Canals went smoothly. The next 6 years saw him heading up waterway led regeneration in the south of England including development of the “business case”, building community support, winning funding and then practical delivery. During that time his team raised nearly £40 million principally from HLF, RDA and other public sources. They also reached the final stages of the £25 million Big Lottery Living Landmarks programme. Since 2008 Andrew has been working on British Waterways' strategic review which has included the valuation of the public benefit that waterways deliver.

Rebecca Pell  
**Countryside Service Development Officer**  
**Worcestershire County Council**

As the Countryside Service Development Officer, Rebecca is responsible for business planning, performance monitoring and fundraising for the teams within the service. She has worked for the council for 7 years, employed initially as a temporary administration assistant, helping deal with the implications of the 'Foot and Mouth' outbreak. She has been in her current position for 4 years. Previous to that Rebecca ran a busy call centre for a fleet management company and was a bars manager for the Hilton group, but her favourite job was the 2am shift squeezing jam into donuts. Having had a theatrical education, in her spare time she sings and plays ukulele in a band which is currently recording and volunteers at the local theatre directing the Youth theatre production.

Pr Simon Shibli  
**Head of Sport Industry Research Centre**  
**Sheffield Hallam University**

Simon is a qualified management accountant who specialises in the economic and financial analysis of the leisure industry. He has a particular interest in countryside recreation and has conducted research in this area for national agencies and local authorities. Within countryside recreation Simon’s specialism’s are: applied economics, notably demand; economic impact analysis; and issues relating to Public Rights of Way.
Isla Campbell
Research Manager
Heritage Lottery Fund

Isla began her career working for the Society for the Protection of Ancient Buildings, Britain's oldest building conservation organisation. During her five years at SPAB, her roles included being Events Organiser during the charity's 125th anniversary year, being East Anglian Caseworker advising on listed building consent applications, as well as organising courses on the repair of old buildings for homeowners, building professionals, contractors and crafts people. She has now been in the Policy and Strategic Development department at HLF for two years. As Research Manager, she has had exposure to heritage projects of all types, as well as wide ranging methods for evaluating their impact. Isla manages research on the Conservation Outcomes of HLF funding and contributes to HLF's rolling economic and social impact research, as well being involved with programme specific evaluations including for the Townscape Heritage Initiative and Parks for People Programme.
APPENDIX C
## Supporting Outdoor Recreation
### The Changing Funding Environment

#### Attendance List

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## Supporting Outdoor Recreation

**The Changing Funding Environment**

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### Supporting Outdoor Recreation

**The Changing Funding Environment**

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The Changing Funding Environment

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# Supporting Outdoor Recreation

## The Changing Funding Environment

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“Supporting Outdoor Recreation - The Changing Funding Environment”
APPENDIX D