MID-TERM EVALUATION

L·E·A·D·E·R DELIVERY IN RURAL BRIDGEND

A report from
Ash Futures
for
Bridgend County Borough Council

August 2017

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Executive Summary

LEADER is an approach to local development in rural areas that is based on principles of locally led, innovative and integrated activities set within a Local Development Strategy (LDS). The Bridgend LDS for 2014-2020 is being delivered through the Thriving Rural Communities Scheme, managed by the Bridgend Local Action Group (LAG) with a core staff support through the Reach team, based with Bridgend County Borough Council.

This mid term evaluation of progress with delivery of the Bridgend LDS by Ash Futures has found that the LAG and Reach has made considerable progress with contributing towards delivery of the objectives of the LDS on various fronts, even though there was a delay in getting the LEADER programme up and running. Key achievements include:

Although only 25% of the budget is spent so far, analysis of what is committed to projects (approved and still to start) suggests this is nearer 45%;

- Some output indicators are well on the way to achievement, arising from the 17 projects already approved and in progress;
- There has been project activity in relation to all of the eleven LDS delivery objectives except three (these being the ones which are most business focused). The highest number of projects relate to the strategic objective about developing sustainable rural services and exploring new ways of delivering non statutory services;
- Financial spend against target has made most progress in relation to RDPW Theme 1 (Adding value to local identity and natural and cultural resources) . Low levels of progress with Themes 4 and 5 are being addressed. There is also a lack of progress with more enterprise focused work and Theme 2 which remains to be addressed;
- In terms of output target, some are well on the way to achievement, notably those for dissemination actions, stakeholders engaged and participants supported. This reflects the type of early stage project preparatory activity that has taken place so far. It is hard to see how some output targets might be met and some might only be achieved after project completion;
- Feedback from projects is that it is quite unlikely they would have happened in any other way if funding from the Thriving Rural Communities Scheme had not been forthcoming;
- Projects have pathways to further activity beyond their initial TRC support, meaning that there should be some sustainability and longevity to the TRC support and potential impacts for the LDS.

Bridgend LAG and Reach now have a significant opportunity to capitalise on what has been achieved to date, through networking across projects that have already been supported for added value and greater synergies, sharing experience and developing networks across projects.

There is also a need to address some key issues notably:

- That of engaging with the private sector and progressing the rural enterprise development aspect of the LDS;
- Drawing more community engagement into the LDS delivery;
- Developing communications and publicity activities;
- Addressing the perception of a local authority led programme of activity.

The evaluation has focused on a number of specific evaluation questions. Key findings and recommendations to emerge from these include:

- The positive value of the Preparatory Support Scheme, set up as part of the Thriving Rural Communities Scheme to specifically support small scale project preparatory work. This has supported early project development across a number of projects. But now there is a need to shift the emphasis onto larger project spend such as pilot actions, whilst still maintaining the Preparatory Support Scheme opportunity, so that project spend and outputs can be fully achieved;

- The potential value of the cross cutting themes, where one or more have been quite central to some projects activities, and therefore the importance of giving them greater consideration in project development;

- Management of the LDS delivery through the Thriving Rural Communities Scheme has been well managed through the Reach team, who are being very professional in their approach. There are areas where further developments in processes around project application, appraisal, monitoring and reporting would develop and improve management further;

- A main factor deterring potential project sponsors is that of lack of understanding of what the current LEADER Programme can fund and do (particularly compared to the previous 2007-2013 programme). Bridgend LAG and Reach can use the experience of what has been achieved so far to promote the opportunities of the Thriving Rural Communities Scheme more clearly and fully;

- The priorities of the Local Development Strategy remain valid   - socio economic circumstances and policy changes do not indicate a need for fundamental change.

The evaluation found that the principles of LEADER are being delivered through the Bridgend Local Development Strategy, the Thriving Rural Communities Scheme and the work of Reach, with potential for further development on some:

- *Achieving integrated and multi sectoral activity:* projects are quite multi-dimensional within themselves. The opportunity is now to extend this through linking across projects and getting more added value for the Local Development Strategy;

- *Innovation:* new ideas are being tested but more could be made of this principle in the project application and appraisal process;

- *Co-operation:* Reach has done well in progressing one co-operation project through to a full RDPW Main Programme project. There are other potential co-operation project opportunities emerging which need to be progressed;

- *Networking:* there is networking within projects and the opportunity is now to develop this to networking between projects;

- *Bottom up and community engagement:* There has been community engagement and involvement with projects at the individual level. What seems to be lacking is a broader community understanding of and engagement with the TRC Scheme and this needs to be addressed;

- *An area based approach:* where the Local Development Strategy is focused on rural Bridgend and projects follow accordingly;

- *Implementation through a Local Action Group:* The rural Bridgend Local Action Group has 21 members and is active in decision making on projects, receives regular financial and outputs progress reports at its meeting and takes decisions to aid delivery of the Thriving Rural Communities Scheme and Local Development Strategy. With the Mid Term evaluation there is an opportunity to now reflect and learn from experience so far, giving time to discuss themes, issues and opportunities.

1 Introduction

1.1 LEADER, the Bridgend Local Development Strategy and the Thriving Rural Communities Scheme

LEADER[1] is an approach to local development in rural areas. Now in its sixth iteration since it was first introduced into European Funding programmes in 1992, it is based on seven essential principles:

- It takes an area based approach, set out in a local development strategy
- It develops from the bottom up in terms strategy and delivery
- It brings together local people in a public/private/community partnership to manage its delivery – the Local Action Group
- It seeks to achieve integrated and multi-sectoral activity
- It seeks to be innovative at the local level
- It also looks to co-operate with other LEADER areas
- And it seeks to develop local networks and encourage networking

The Bridgend Local Development Strategy (LDS) setting out the LEADER strategy and approach for rural Bridgend for the EU structural funding period 2014 – 2020 was prepared and submitted to Welsh Government (WG) for approval in 2014. This is not the first time that a LEADER programme has run in rural Bridgend. There have been earlier programmes e.g. during the 2007-2013 Structural Fund period.

The Thriving Rural Communities Scheme is the LEADER programme through which support is provided to projects. It is managed and facilitated by Reach, a team of six who deliver LEADER in rural Bridgend on behalf of the Bridgend Local Action Group (LAG). Bridgend County Borough Council (BCBC) is the administrative body for the LEADER programme and acts as employer for the Reach team.

The timeline for full approval of the LDS has been protracted because the Rural Development Programme for Wales (RDPW), which is the source funding for LEADER, had not been approved by the European Commission when LDS's were originally submitted for approval to WG. As a consequence, the work was initially started at risk. Whilst this usefully allowed for some development of LEADER processes, it has also meant that the programme has only really been fully operational for the past 16 months with consequent impacts on the extent of delivery to date. This is important context for this evaluation, particularly with regards to understanding the impact the projects funded through the programme - and therefore the programme as a whole - may have had. The following sets out a timeline on the approval process.

| 2014 | Sept | LDS for 2014 – 2020 drafted and submitted to Welsh Government in 2014 |
| | Dec | Close of RDP 2007-2014 |

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[1] It is a French acronym 'Liaisons Entre Actions pour le Developpement de L'Economie Rurale' – links between actions for developing the rural economy.

2015	Feb	Welsh Government issue notice to 'Proceed at Risk'. RDP W not approved at this time, hence the 'in principle' approval.
	Jan - Mar	Reach team developed collaborative approaches research prior to April which involved talking to other LAGs to identify synergies in LDSs. LDS Queries, LAG Terms of Ref, Thriving Rural Communities process and paperwork completed for WG Approval.
	Apr - July	Co-ordinators commence work on 4 in-house feasibility studies. These led on to future project development including the Kenfig Natura 2000 project. No project costs were incurred.
	June	RDP 2008-2014 Programme Management ends. YH & RH finalise and administer previous programme closure, final reports, final claims and evaluation.
	Aug	Formal Programme Approval Letters received.
	Aug	LAG Meeting gives Kenfig Project approval and tests TRC application process.
	Sep - Dec	LDS and Intervention Logic Table review, WG queries response.
2016	Jan	TRC Process amended to include PSS element: The LAG approved a proposal for a secondary route to support projects using a simplified set of criteria so that shorter, smaller projects can be diverted to a simplified assessment process.
	Jan	LEADER update issued by WG including new Programme Performance Framework
	Mar	Official Bridgend TRC and Programme Launch Event.
	Apr	Revised financial and PI profile submitted to WG.
2017	Mar	1st Programme Claims invited.

1.2 The evaluation brief

This report responds to a request for a mid-term evaluation of progress with delivery of the LDS by Reach on behalf of the LAG[2]. The brief set out a number of specific questions for the evaluation to address, in order to be able to address its three requirements of:

- **Evaluation of progress in helping to implement the Local Development Strategy**
- **Review of the LDS** and its ongoing relevance in changing social, economic and political circumstances
- **Recommendations** to inform any refresh of the LDS

The specific evaluation questions have been explored in relation to the three common purposes of evaluation:

- **Effectiveness.** This looks at how/whether objectives of the supported activities are being, or will be, achieved. In the context of this evaluation, this is about how activities being
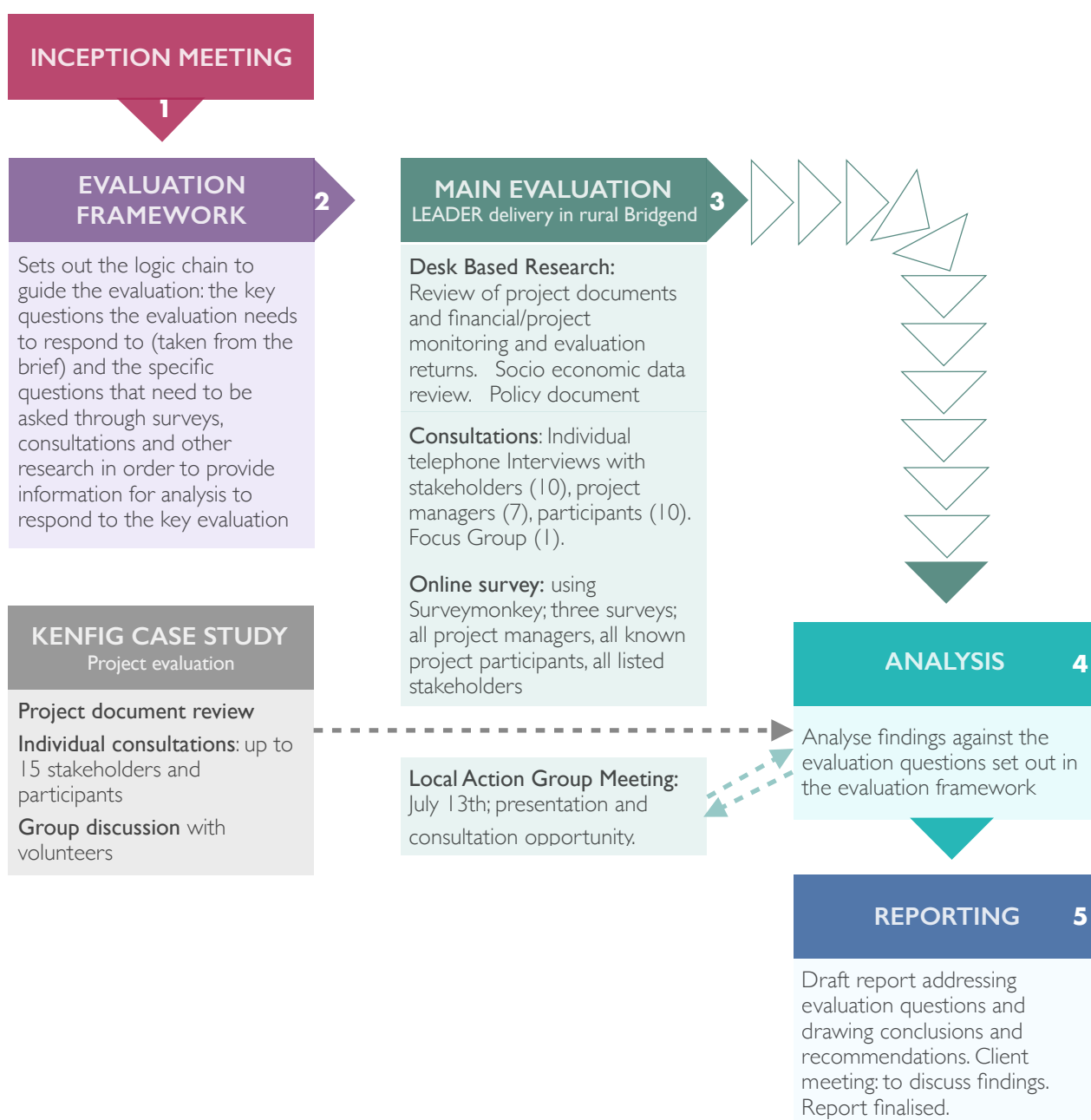
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[2] The brief also sought an evaluation of the Kenfig Natura 2000 project, which has been done alongside this report.

undertaken, as part of Thriving Rural Communities and through the LEADER approach, will help to achieve LDS delivery objectives

- **Efficiency.** This looks at outputs relative to inputs; their cost efficiency, value for money and timeliness, organisation and management. For this evaluation, this particularly relates to Reach and LAG management, the organisation and administration around Thriving Rural Communities, and the application, appraisal, delivery, monitoring and evaluation processes

- **Impact.** This looks at the positive (and possibly negative) changes resulting from supported activities and what the consequences of these are. In the context of this evaluation, this is about how activities are, or will, contribute to achieving LDS strategic objectives and vision, and/or whether there are other factors external to the programme that may impact on its ability to achieve these.

1.3 Approach to the evaluation

The method for undertaking the evaluation is set out in the following diagram:

INCEPTION MEETING

1

EVALUATION FRAMEWORK **2**

Sets out the logic chain to guide the evaluation: the key questions the evaluation needs to respond to (taken from the brief) and the specific questions that need to be asked through surveys, consultations and other research in order to provide information for analysis to respond to the key evaluation

MAIN EVALUATION LEADER delivery in rural Bridgend **3**

Desk Based Research: Review of project documents and financial/project monitoring and evaluation returns. Socio economic data review. Policy document

Consultations: Individual telephone Interviews with stakeholders (10), project managers (7), participants (10). Focus Group (1).

Online survey: using Surveymonkey; three surveys; all project managers, all known project participants, all listed stakeholders

KENFIG CASE STUDY Project evaluation

Project document review

Individual consultations: up to 15 stakeholders and participants

Group discussion with volunteers

Local Action Group Meeting: July 13th; presentation and consultation opportunity.

ANALYSIS **4**

Analyse findings against the evaluation questions set out in the evaluation framework

REPORTING **5**

Draft report addressing evaluation questions and drawing conclusions and recommendations. Client meeting: to discuss findings. Report finalised.

A key element which has guided the evaluation has been the evaluation framework which was developed at the start of the process (Annex One). This links the core questions of the evaluation to the tasks required to meet those objectives, and to explain why those tasks were undertaken and how the information collected responded to the evaluation questions.

The method is set out in more detail in Annex Two. We undertook all the tasks proposed, although some were not as fully effective as anticipated. Notably:

- The focus groups for Kenfig and Rural Thematic Group members did not get the response to participate that we had originally hoped[3]. Both groups took place but each with only two or three attendees. Therefore they became very small group discussions, although still providing valuable feedback.
- The online survey for project participants received only one response. This was disappointing. Once appointed we found that Reach had already sent out an evaluation questionnaire to project participants (with 10 responses overall, although five of these were from one project). This provided a core of questions for our online survey and was re-sent to those Reach had contacted in order to seek more responses. However, this was largely unsuccessful. The stakeholder online survey received 18 responses, although sent to 220 contacts through Reach. Again, this was a disappointing response rate, but possibly reflective of the extent of community engagement in the programme, a point we discuss further in Section Six.

1.3 The report structure
The evaluation report is now set out in seven further sections, supported by various appendices. In summary:
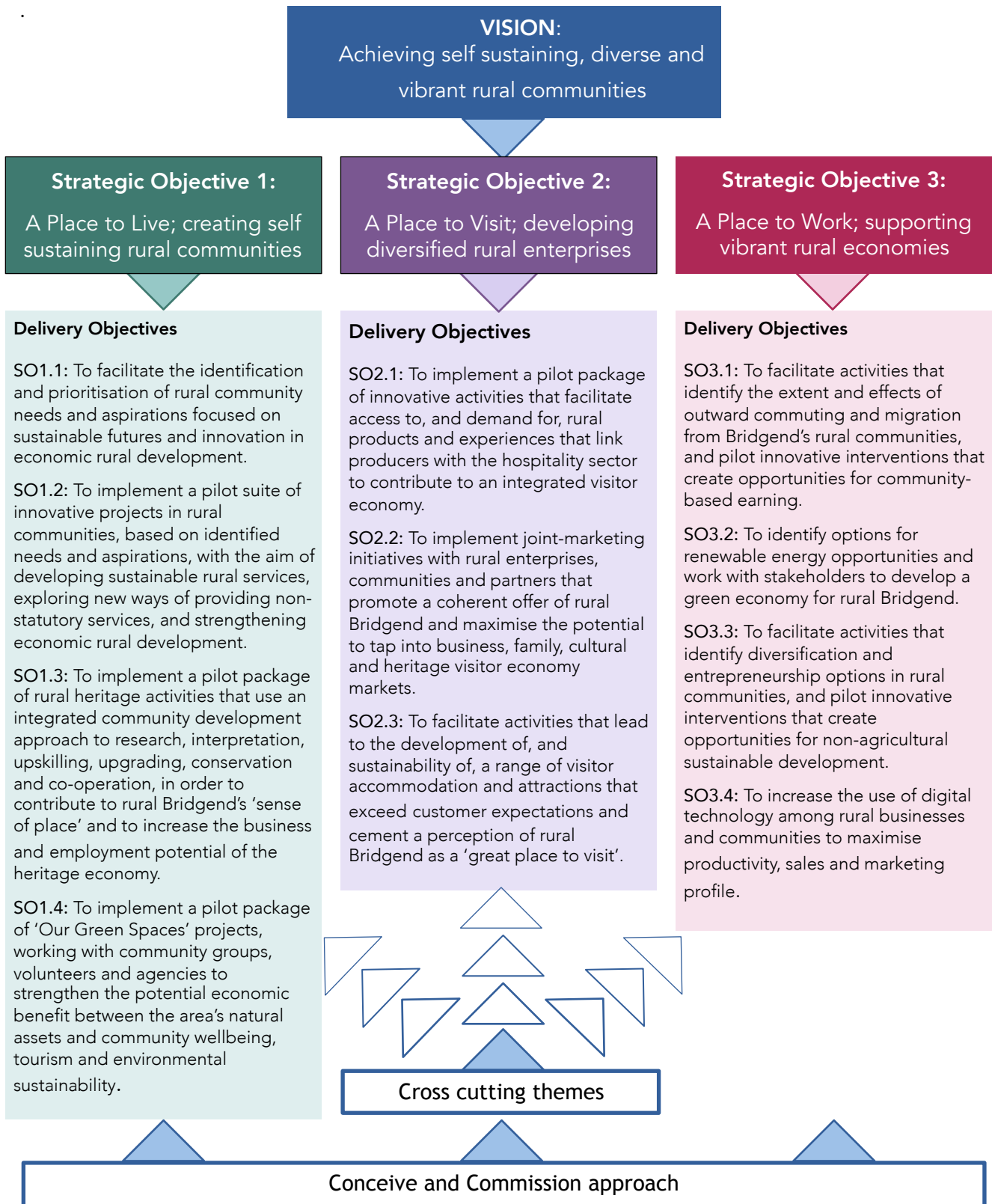
- Section Two gives a short introduction to the Bridgend Local Development Strategy and its delivery and management
- Section Three reviews key data describing the socio-economic context of rural Bridgend, together with some recent policy and strategies, to assess any changes that should be considered and their implications for the LDS moving into the latter part of the programme
- Section Four looks at progress with the LDS output and financial targets
- Section Five reviews progress towards the LDS strategic and delivery objectives
- Section Six looks more broadly at progress towards LEADER principles and wider LDS impacts
- Section Seven reviews organisation and management of the LDS and its delivery (noting that this is not a full audit of process, rather an overview)
- Finally Section Eight draws all this together in conclusions responding to the two core evaluation questions in the brief, and recommendations for the remainder of the LEADER period (and noting that specific evaluation questions are addressed in earlier sections)

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[3] Invitations to attend were circulated by Reach.

2 The Bridgend Local Development Strategy

This section describes the Bridgend LDS, its core objectives and fit with the Rural Development Programme for Wales' five themes for LEADER, before going on to review project activity to date and the functioning of Reach and the Local Action Group. This is intended to set the context for our evaluation which is in the subsequent sections.

2.1 Local Development Strategy: Vision, Strategic and Delivery Objectives

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VISION:
Achieving self sustaining, diverse and vibrant rural communities

Strategic Objective 1:
A Place to Live; creating self sustaining rural communities

Strategic Objective 2:
A Place to Visit; developing diversified rural enterprises

Strategic Objective 3:
A Place to Work; supporting vibrant rural economies

Delivery Objectives

SO1.1: To facilitate the identification and prioritisation of rural community needs and aspirations focused on sustainable futures and innovation in economic rural development.

SO1.2: To implement a pilot suite of innovative projects in rural communities, based on identified needs and aspirations, with the aim of developing sustainable rural services, exploring new ways of providing non-statutory services, and strengthening economic rural development.

SO1.3: To implement a pilot package of rural heritage activities that use an integrated community development approach to research, interpretation, upskilling, upgrading, conservation and co-operation, in order to contribute to rural Bridgend's 'sense of place' and to increase the business and employment potential of the heritage economy.

SO1.4: To implement a pilot package of 'Our Green Spaces' projects, working with community groups, volunteers and agencies to strengthen the potential economic benefit between the area's natural assets and community wellbeing, tourism and environmental sustainability.

Delivery Objectives

SO2.1: To implement a pilot package of innovative activities that facilitate access to, and demand for, rural products and experiences that link producers with the hospitality sector to contribute to an integrated visitor economy.

SO2.2: To implement joint-marketing initiatives with rural enterprises, communities and partners that promote a coherent offer of rural Bridgend and maximise the potential to tap into business, family, cultural and heritage visitor economy markets.

SO2.3: To facilitate activities that lead to the development of, and sustainability of, a range of visitor accommodation and attractions that exceed customer expectations and cement a perception of rural Bridgend as a 'great place to visit'.

Delivery Objectives

SO3.1: To facilitate activities that identify the extent and effects of outward commuting and migration from Bridgend's rural communities, and pilot innovative interventions that create opportunities for community-based earning.

SO3.2: To identify options for renewable energy opportunities and work with stakeholders to develop a green economy for rural Bridgend.

SO3.3: To facilitate activities that identify diversification and entrepreneurship options in rural communities, and pilot innovative interventions that create opportunities for non-agricultural sustainable development.

SO3.4: To increase the use of digital technology among rural businesses and communities to maximise productivity, sales and marketing profile.

Cross cutting themes

Conceive and Commission approach

The Bridgend LDS sets out three Strategic Objectives and a series of delivery objectives for each. The strategic and delivery objectives are intended to deliver a vision for rural Bridgend of 'achieving self-sustaining, diverse and vibrant rural communities'.

The LDS was developed through a series of steps which included views from consultations, a SWOT analysis undertaken through rural Thematic Groups, socio-economic data research and policy review. This process was undertaken during 2014. The strategic objectives and their associated delivery objectives reflect the priorities at the time. Not only do the LDS objectives guide activities through the LEADER approach and Thriving Rural Communities, but more broadly they provide a strategic context for rural Bridgend to help guide other activities outside of the LEADER programme.

2.2 Fit with Rural Development Programme Wales (RDPW) five themes

The RDPW, which is the Operational Programme for the European Agricultural Fund for Rural Development in Wales including LEADER (and other rural development activities), sets out five themes into which implementation activities need to fit. It also details a co-operation theme, as well as detailing guidelines for LAG administration, management and facilitation for LEADER[4] .

The five themes set out in the RDPW for implementation activities cover:

- Adding value to local identity and natural and cultural resources
- Facilitating pre-commercial development, business partnerships and short supply chains
- Exploring new ways of providing non statutory local services
- Renewable energy at community level
- Exploiting digital technology

The Intervention Logic Table is an integral part of the LDS which maps strategic and delivery objectives onto the five RDPW themes and co-operation theme (together with indicative activities and output indicators and targets).

It is important to recognise that having an LDS with one set of objectives, and an operational programme requiring activity to contribute to five specific themes, adds a layer of complexity to delivering activity on the ground. Projects need to satisfy both requirements. As our diagrammatic representation of this in Annex Three makes clear, none of the three LDS strategic objectives sit wholly within any one of the five RDPW themes. Hence delivery objectives from one strategic objective are split between themes. In practice Reach's guidance promotes the five RDPW themes, whilst also referencing that they each have several delivery objectives which are those set out in the LDS.

2.3 Delivery

LEADER activity through the LDS is being delivered by Reach on behalf of the LAG, through the Thriving Rural Communities Scheme:

- The Reach team is hosted by Bridgend County Borough Council (BCBC)[5], with a Programme Manager and a Programme Monitoring Officer, together with a team of four Rural Coordinators who work directly with those involved in projects either as project managers or contract managers depending on who is leading projects[6]

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[4] *Measure 19 of the RDPW and associated sub-measures. The Co-operation theme relates to LAGs working together on sharing experience through joint projects.*

[5] *BCBC is the administrative body for LEADER in rural Bridgend*

[6] *One of the four is a recent one year secondment to the team to specifically work on development of activities under Themes 4 and 5. Not all of these posts are full time.*

- The Thriving Rural Communities Scheme[7] has two elements:
  - A Preparatory Support Scheme (PSS) which can support direct project costs with up to £7,500 of revenue funding. It was developed by Reach, specifically to be able to support small scale activities that could build capacity and support the early stages of developing project ideas
  - The Thriving Rural Communities main programme which can support direct project costs requiring higher levels of funding up to £100,000

2.4 The budget

The total budget for LEADER in Bridgend is some £2.24m of which c£1.8m is funded by the RDPW and the remainder is matched funding levered into projects. Matched funding (minimum 20%) is required for Implementation and Co-operation projects. BCBC has underwritten the matched funding requirement with £353,000 although projects are are drawing in matched funding from other sources, reducing the amount to be underwritten.

Latest financial monitoring information from Reach (July 2017) indicates that about 25% of the overall budget has actually been spent so far[8].

The way in which LEADER funding can be spent is prescribed by guidance from the Welsh Government. Essentially the budget is for revenue funding only. Unlike previous programmes, capital expenditure[9] is not eligible in this programme. The LEADER guidance does not give a specific list of what could be eligible activities –this has emerged through a series of questions and answers between LAG groups and the Welsh Government to test what could be done by way of LEADER funded activity. Importantly, LEADER does not have any State Aid cover[10], meaning that it cannot do anything by way of direct support to business undertakings and economic operators[11]. This is an important context for this evaluation.

2.5 Projects

Seventeen projects have been supported to date, including four studies that were undertaken by Reach staff soon after LDS approval and before the TRC Scheme was put in place. The table in Annex Four summarises these.

At its meeting in July 2017, the LAG approved two further projects:

- The Bridgend Business Online Forum (under Theme 5), a project to develop an online presence and resources for rural businesses, working with the Bridgend Business Forum; funding request £22,000
- Sustainable rural communities off-gas project (under Theme 4), working with a community on an off mains gas as an exemplar project to find ways to be self-sufficient in energy. Funding request £30,000

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[7] The funding available is revenue funding. Capital funding is NOT available through TRC (although note there are some small scale areas of 'capital' possible e.g. for small scale equipment such as IT). In addition to the direct project costs, Reach staff costs are also allocated to project implementation.

[8] A recent Written Assembly request for information indicates that the overall Rural Development Funds in Wales were only 10% spent as at end May 2017. https://www.welshconservatives.com/news/anger-welsh-government-reveals-less-10-spent-eu1bn-eu-backed-rural-programme-3-years-after

[9] Defined as spend over £10,000 and with a life span of one year or more

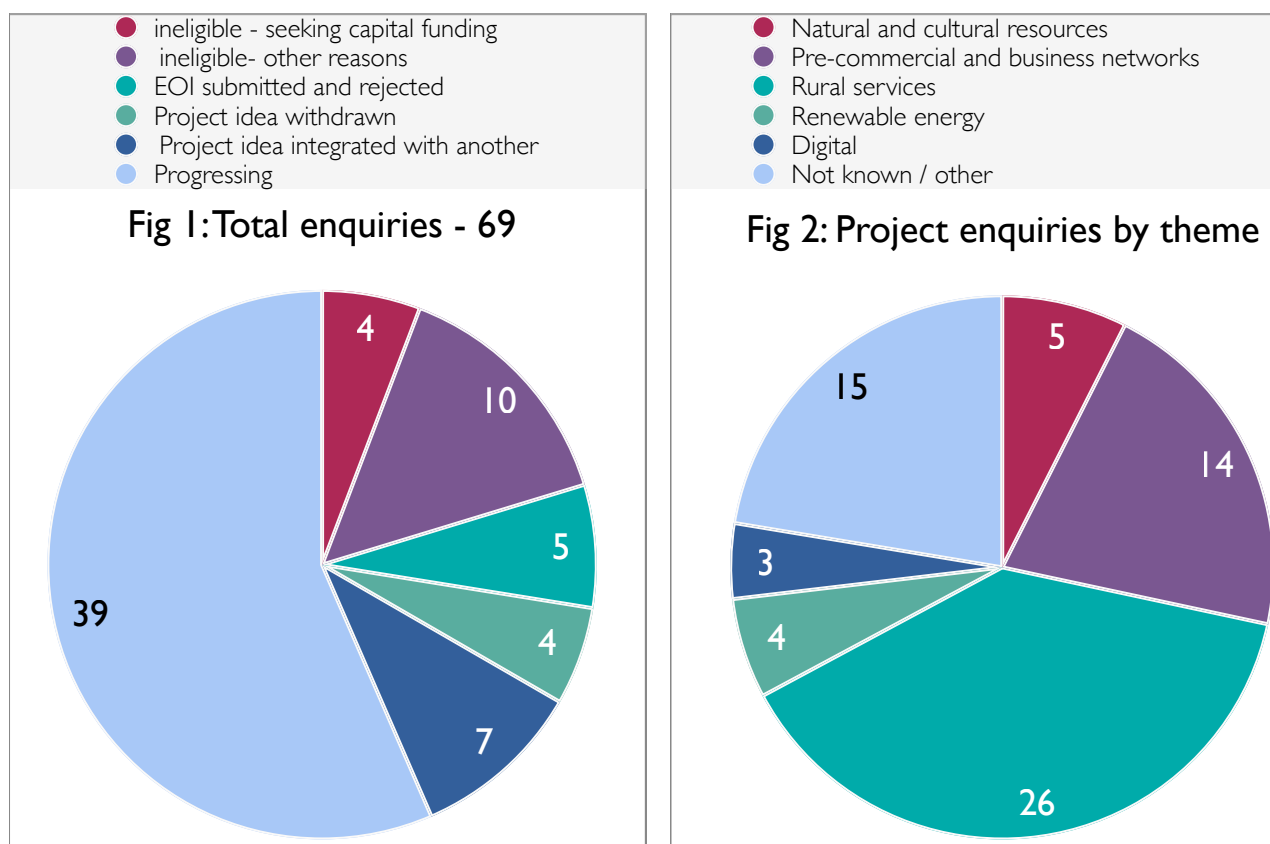[10] Our understanding is that the Welsh Government chose not to apply for/use De Minimus cover, which would have allowed small grants to go to businesses and others. We understand this was as a result of evaluation recommendations emerging from the previous programming period

[11] These are defined is any undertaking engaged in economic activity regardless of legal status and can therefore include social and community enterprises

There are further projects in development, for both the main programme and the Preparatory Support Scheme. Information held by Reach suggests this includes two schemes for Theme 3, one for Theme 5 and two for Theme 1 or 2.

In addition to projects supported, Reach has also received a much larger number of enquiries. Analysis of these[12] is shown in Fig 1.

A range of discussions have clearly been held between potential project developers and Reach. Feedback suggests that some projects have been progressed through different routes, with others simply not being taken forward as projects. Project enquiries have come from a mix of community groups, other local and third sector organisations, local authority departments, other established organisations such as Natural Resource Wales (NRW) and Bridgend College or initiated by Reach directly.

Fig 1: Total enquiries - 69

Legend:
- ineligible - seeking capital funding
- ineligible - other reasons
- EOI submitted and rejected
- Project idea withdrawn
- Project idea integrated with another
- Progressing

Fig 2: Project enquiries by theme

Legend:
- Natural and cultural resources
- Pre-commercial and business networks
- Rural services
- Renewable energy
- Digital
- Not known / other

Looking at project enquiries by RDP theme[13], the largest category have been around rural services provision and associated premises, as shown in Fig 2.

Of the rural services enquiries, nine have related to community buildings. It is also worth noting that whilst a number of enquiries have come from community groups and businesses, fourteen have also come from public service providers (including local authorities).

2.6 The Role of LAG and Reach

The Bridgend LAG is the group overseeing the delivery of the LDS and making the decisions on where LEADER funding will be invested. This is in line with Welsh Government Guidance on

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[12] Reach keeps a list of all enquiries received, whether they are likely to be eligible or not and actions taken by Reach staff in relation to them. Our analysis is based on this list.

[13] Our assessment of fit against these themes

decision making and requirements for the balance of public, private and third sector representation on LAGs.

The Bridgend LAG has Terms of Reference that set out its roles and responsibilities. The membership list for the current LAG lists 21 representatives[14] – although our consultations have indicated one member who has recently resigned having moved from the area. The LAG is currently chaired by the Bridgend Council Cabinet Portfolio Holder for Education and Regeneration.

Reach provides the officer support to the LAG with a staffing of six (a mix of part and full time posts) described earlier. All Reach staff are BCBC employees as Bridgend Council is the administrative body for LEADER and provides the financial and administrative management. Reach staff are 'located' within the Council's Economy and Natural Resources department.

The key decision making activities of the LAG focus on the projects through Thriving Rural Communities (and the earlier activities before TRC was developed). Reach has developed a process and associated paperwork to support TRC and decision making processes, ensuring decisions are recorded.

One further and important point to note here is that in the previous LEADER Programme period (2007-2013), the Reach team was much larger (19 staff) and involved in delivering a range of capital and revenue funded activities across LEADER and Axis 3. In the current programme it is a much smaller team and focused solely on TRC, signposting to other programmes where appropriate.

The 'conceive and commission' approach

The LAG has used a conceive and commission approach in the TRC Scheme. This means that project proposers don't carry out the project themselves. Instead they work with Reach and others to develop a brief for a specific piece of work, once a project idea[15] is accepted as potentially eligible for funding. The brief is then put out to tender, consultants appointed and the work carried out reporting to a steering group. The REACH team will operate the tender process and manage the subsequent contract on behalf of the steering group.

Reach works with a local steering group drawn from the local community, interested local networks and groups and others, to help put together the initial development ideas into a potentially deliverable project . Reach often puts that steering group together by approaching individuals with expertise/interest in the relevant area). It is possible that those who initially proposed the idea can bid to carry out the work, provided they have not been party to the final development of the brief itself.

The following sets out a flow chart of the process:

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[14] LAG members represent organisations from the public, private and third sectors. LAG members are not there as individuals

[15] The project ideas could come from a range of sources as previously discussed.

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                    ┌─────────────────────────────────────────┐
                    │  Initial ideas may be discussed with REACH │
                    └─────────────────────────────────────────┘
                                     │
                                     ▼
        ┌─────────────────────────────────────────┐   ┌─────────────────────────────────────────┐
        │        Expression of interest made.       │   │         Eligibility checklist covers:     │
        │  Initial checks by REACH Monitoring and   │   │   the proposing organisation, the named   │
        │             Resource Officer              │   │ contact, alignment to the RDP five themes,│
        └─────────────────────────────────────────┘   │   community benefiting, State Aid.        │
                                     │                  └─────────────────────────────────────────┘
                                     ▼
  ┌──────────────────────┐  NO  ◇ ELIGIBLE ◇  YES  ┌─────────────────────────────────────────┐
  │ Project not taken     │◄─────         ─────────►│  Recommended for continuing to either     │
  │ further               │                         │  the PPS or TRC main programme.            │
  └──────────────────────┘                         │  REACH Rural Co-ordinator allocated.       │
                                                    └─────────────────────────────────────────┘
                                                                       │
                                                                       ▼
                                                    ┌─────────────────────────────────────────┐
                                                    │     Preparation of a full application      │
                                                    │     Either to PPS or main programme        │
                                                    │   (this stage can take weeks/months)       │
                                                    └─────────────────────────────────────────┘
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Full application to Preparatory Support Scheme

PPS is assessed by LAG sub-group, with recommendations e-mailed to LAG Board members for endorsement. There are 4 assessment criteria:

- The project clearly aligns to LDS priority interventions
- There is a clear identified need for the project
- The project is likely to complete within 6 months
- The project offers value for money

Full application to the main programme

Main programme projects are scored on nine criteria by LAG members and are currently reviewed at a full LAG meeting with a vote being taken on decision to support or not.
- Impact on delivering the LDS
- Consultation and stakeholder engagement
- Market assessment
- Complementarity with other initiatives and funds
- Added value of funding through LEADER
- Realistic and measurable milestones and targets
- Realistic physical and financial deliverability
- Value for money
- Follow up and sustainability

Decision made by LAG members, by e-mail. This enables a 6 week turnaround from receipt to decision

LAG decision made at LAG meeting. This formal decision is made within 3 months of application

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  ┌──────────────────────┐  NO  ◇ SUPPORTED ◇  YES  ┌─────────────────────────────────────────┐
  │ Project may be        │◄─────          ─────────►│  Project proceeds with a Reach Contract   │
  │ re-submitted          │                          │  Manager assigned to it                    │
  └──────────────────────┘                          └─────────────────────────────────────────┘
```

Monitoring Report covers:
Project milestones; Targets/performance indicators and progress; Budget and progress; Sources of levered income; Evidence checklist for the above; Reach Monitoring Visits Record

Project evaluation form covers:
How involved in the project; Achievement of project aim; Achievement of outputs/deliverables/targets; Comment on contribution to cross cutting themes; Other feedback invited on application process, communications, support received, lessons learnt etc.; Experience with TRC; Finding out about TRC; Recommending it to others

Regular contact with REACH manager

Monitoring reports submitted

Monitoring reviews by REACH officer

Evaluation form - sent to project participants on completion of project

2.7 Summary

- The LDS sets three strategic objectives and 11 delivery objectives, all to support a vision of achieving self-sustaining, diverse and vibrant rural communities
- Sitting alongside this are five RDPW themes that activity needs to fit with, and a LAG Co-operation theme
- The LDS is being delivered by Reach on behalf of the LAG
- The LDS has an overall budget of £2.24m of which 25% is actually spent so far
- It has supported 17 projects to date with a further two just approved at July's LAG meeting
- Thriving Rural Communities is the programme through which LEADER money is spent on projects, adopting a 'conceive and commission' approach and with a Preparatory Support Scheme to support small scale and early stage research and development work with larger projects going into the main programme
- There are some significant differences between what LEADER can support through TRC and what Reach has supported through earlier LEADER programmes (e.g. in the 2007 – 2013 programme). Key amongst these are that there is no capital element to LEADER this time and it cannot support businesses (or economic operators) directly.
- There is also a significant difference in the size of the Reach team between the previous programme period (2007-2013), which is now 6 staff members, down from 19 previously. This reflects its sole focus on the TRC scheme in terms of direct facilitation/delivery.

3 The changing socio economic context

3.1 Review of LDS and other potentially relevant indicators

We have reviewed the key data used in the LDS to identify key issues taken forward into LDS objectives.

The LDS was produced relatively recently (2014) and as a consequence it is unlikely that socioeconomic conditions in rural Bridgend will have changed markedly in the subsequent period. Equally, if conditions have changed then this may not yet have been reflected in updated data from that used in the LDS (acting as a baseline for any subsequent socioeconomic analysis).

Much of the data contained in the LDS was based on 2011 Census. As such, no updates are available. However, there have been some data updates which are important to highlight given their relevance to the LDS themes. These are summarised below and set out in detail in Annex Five.

The Welsh Index of Multiple Deprivation (WIMD is the Welsh Government's official measure of relative deprivation for small areas in Wales. It is designed to identify those areas where there are the highest concentrations of several different types of deprivation. As such, WIMD is a measure of multiple deprivation that is both an area-based measure and a measure of *relative* deprivation. WIMD is currently made up of eight separate domains (or types) of deprivation. Each domain is compiled from a range of different indicators.

The WIMD is calculated for all Lower layer Super Output Areas (LSOAs) in Wales (areas that have an average population of about 1,600). There are 40 LSOAs in Rural Bridgend (out of a total of 87 in Bridgend County Borough as a whole), within the 21 wards within the LEADER programme area.

In terms of the overall (WIMD) index of deprivation[16], Rural Bridgend has 4 LSOAs in the 10% most deprived areas of Wales. Bridgend Borough County has 9 LSOAs in total within the 10% most deprived. This is broadly commensurate to the share of LSOAs within Bridgend that are within Rural Bridgend i.e. on a pro rata basis.

- Therefore the broad conclusion is that Rural Bridgend is not more, or less, deprived than elsewhere in Bridgend (based on a consideration of the combined domains).
- However, it does perform relatively poorly in the specific measurements of health[17] (with 5 LSOAs considered in the 10% most deprived in Wales), and education[18] (with 6 LSOAs within the 10% most deprived).
- Conversely, Rural Bridgend performs relatively well on the measurements of income, employment, access to services[19], community safety and housing.

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[16] *The WIMD is constructed from a weighted sum of the deprivation score for each of the 8 domains. The weights reflect the importance of the domain as an aspect of deprivation, and the quality of the indicators available for that domain. Together, the 'income' and 'employment' domains represent 47% of the overall weighting.*

[17] *This considers indicators such as standardised death rates, cancer incidence, long-term limiting illness etc.*

[18] *This considers indicators such as performance in Key Stage 2 & Key Stage 4, repeat absenteeism, proportion of 18-19 year olds not entering HE etc.*

[19] *Perhaps somewhat surprising given that rural areas tend to perform more poorly on this measure*

Some of the underlying data of the WIMD is updated on an annual basis, where possible. The most recent updated data were published in April 2017. It is important to note that the updates are the underlying data and not updated rankings, the focus of the more comprehensive WIMD.

- The annual WIMD *health* indicators do highlight some differences in Rural Bridgend to elsewhere. It has marginally higher death rate (standardised on an age-sex basis to take into account any demographic differences), incidence of cancer, as well as a marginally higher incidence of low weight births.

- In terms of those annual measurements relating to income and employment deprivation, Rural Bridgend was broadly comparable to wider areas (although 17% of the population of Rural Bridgend were suffering from some form of income deprivation).

- Rural Bridgend was also broadly comparable to elsewhere in updated measurements relating to education and crime.

Other information that has been recently updated also highlight some relevant findings:

- According to National Survey for Wales data[20] only 60% of Bridgend residents of non-pension age felt that they are able to fully keep up with bill payment without any struggle, the remainder experiencing difficulties either constantly or from time to time.

- In terms of broadband connectivity, the latest data released by Ofcom[21] shows that 91% of premises in Bridgend[22] had potential access to superfast broadband connections in 2016, compared to 85% in Wales. Therefore superfast broadband connectivity is high in Bridgend when compared to other areas (for example in parts of rural North & West Wales superfast availability is broadly around 75%).

The broad conclusion from the analysis of available updated socioeconomic data is that conditions within rural Bridgend do not appear to differ markedly from the wider Bridgend area. The rural and non-rural parts of the local authorities – whilst facing their own specific challenges – are relatively similar in relation to the indicators we have reviewed.

In terms of understanding whether some of the socioeconomic issues identified in the LDS have changed as a consequence of any activity, it is simply too early to say. It is our expectation that, given that scale and nature of the projects supported thus far, that it is unlikely any macro-level changes in socioeconomic conditions would yet have occurred.

3.2 The changing policy context

There are some developing policy areas with potential for LDS links over the remaining Programme period to 2020. These are discussed briefly below, with further detail in Annex Six.

- The development of strategies for Swansea City Region and Cardiff Capital region[23]:
  - ‣ Swansea City Region City Deal has elements that include a regional digital super hub in Neath Port Talbot Council and a 'Homes as Power Stations' project also led by Neath Port Talbot with a main aim to reduce fuel poverty with consequent health and wellbeing benefits. The latter could have potential links given the developing work on community renewable energy opportunities in rural Bridgend

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[20] *Not specific to Rural Bridgend but data at a local authority level*

[21] *Connected Nations 2016 - Ofcom*

[22] *Again, data at a local authority level*

[23] *Bridgend is part of Cardiff Capital Region but adjacent to Swansea City Region and therefore still with a potential interest in what happens there.*

- ‣ Cardiff Capital Region's City Deal includes the South East Wales Metro proposals which include electrification of the Valleys Railway lines. Improved transport links could be a major benefit to the rural areas of Bridgend including access into the valleys. Although the timetable for delivery of this is well beyond that of LEADER, it could be an additional opportunity to plan for, in working with communities in the valleys. Green and blue infrastructure (water) are recognised as a potential economic driver for the Capital region and as important to the quality of life as to development of tourism, as demand for tourism is significantly from residents of the Capital Region. This could also be a potential market for rural Bridgend to think about in its work with green and blue infrastructure

- Bridgend's draft wellbeing assessment (January 2017) raises some relevant (to the LDS) challenges for economic, environmental, social and cultural wellbeing moving forward that include:
  - ‣ An economic divide between those doing OK and those on the economic margins; and a particular problem with economic opportunities for young people
  - ‣ Issues of linking public transport and green infrastructure; and the wider point about availability of public transport limiting access to services and facilities
  - ‣ Keeping cultural and historic assets, a reducing Welsh speaking population and issues of digital inclusion

- These are themes where TRC is well placed to undertake some initial preparatory work - and is already doing so. The public transport links including cycling is a potential development opportunity for TRC.

- More broadly, three linked Welsh Government Acts[24] look at the long-term wellbeing of Wales and advocate taking a more joined up approach by service providers. This is something which is also important to the LEADER approach and where there is now potential to 'join the dots' and build on the projects that TRC has supported to date (discussed further in Section Six)

3.3 Qualitative perspectives on changes relevant to LDS priorities

Interviews and online surveys have explored views on whether the priorities set out in the LDS remain relevant or should change. Online survey responses indicate that nobody felt these priorities were no longer important issues for the future[25]. Responses indicated these remain important issues to address (albeit with a few caveats).

Interviews and focus groups have noted some points about actual issues covered in the LDS, although these are largely individual rather than shared comments:

- One comment concerned about a lack of focus on poverty and back to work projects
- One was concerned about the too much of a focus on environmental activities

A larger number of shared comments have been made around the presentation of the LDS rather than its content. This included:

- A concern that the LDS objectives are too vague and could be sharpened up
- The wording of delivery objectives is too obtuse– it is not really clear what could be done
- A lack of communication and promotion about project opportunities within the LDS context

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[24] *The Wellbeing of Future Generations Act Wales (2015), the Environment Act 2016 and the Planning (Wales) Act 2015*

[25] *10 out of 18 survey respondents answered a specific question on whether LDS priorities remain important for the future, with nine 'yes' comments, although some with caveats. One comment was specifically on availability of funding for local businesses*

These comments are less to do with whether the LDS is still setting out the right priorities and more to do with understanding and promoting what could be done. We understand the point about the LDS strategic objectives being very general. The delivery objectives do provide more detail although we would agree it is not always clear what could be included within these. However, it is also important to have flexibility to respond to different opportunities. Making objectives too specific could also cause issues, creating a different set of problems to having wider objectives. In our view what is required is not necessarily a re-writing of what there is but better promotion of what has happened using examples, celebrating activities to date, scoping what could be done to fill gaps, and working more on the longer-term sustainability and linkages of activities – all points that we cover later in this report.

3.4 Links between LEADER funded projects and a wider policy context

In reviewing projects for this evaluation we have looked at project application forms and noted that most do include reference to other strategies. These include various BCBC strategies and the Wellbeing Act. The strongest applications are where there is a positive link being made to particular themes or priorities, and an explanation why (rather than just a list of linked strategies).

From our interviews with stakeholders and project participants, there are areas emerging where TRC supported projects should, or are, integrating into wider programmes of activity arising from policy development, examples including:

- The Community Asset Transfer (CAT) agenda of BCBC and the support that the CAT toolkit and business support advisor can provide to rural communities engaged in CAT
- The low carbon agenda where BCBC is involved in a national (England and Wales) pilot project around low carbon heat networks, with the potential for synergies between this work and the community renewable energy work of TRC
- Work on green and blue infrastructure, the potential of its role in health and wellbeing and rural tourism and the economy more generally (that could also be linked into wellbeing e.g. through outdoor activities)

What would now be valuable is a wider recognition of what the TRC supported schemes have to offer by way of learning, experience and opportunity to help develop these wider strategies and to link them in more substantively. This mid-term evaluation and our recommendations around wider communications (see Section Seven) could offer a good platform for reviewing the potential for linking TRC activities with the wider policy context.

3.5 Implications for the LDS and its delivery

In conclusion, our review of data and policy has not identified any factor which implies a major shift in direction is required.

The review of data serves to reinforce the ongoing issues that rural Bridgend faces and perhaps emphasise some further (for example health issues). This is reinforced by qualitative feedback from interviews and surveys where the priorities in the LDS are still considered to be relevant and without the need for change.

The policy review opens up the prospect of further opportunities arising from new policy foci (e.g. City Deals). It also emphasises the need for integrating across policy areas. On this latter point we feel there is potential for this to happen further through the LAG, Reach and the TRC Scheme.

4. Progress towards LDS Targets

This section reviews progress to date against the LDS budget and output indicators, making use of Reach monitoring information and other information from review of documents.

4.1 Progress with Spend

Latest financial monitoring information from Reach (July 2017) indicates that about 25% of the overall budget has been spent so far:

	Total Budget	Spend to date	Spend %
Running costs of the LEADER programme (e.g. Programme management and monitoring, office overheads)	£188,600	£70,406	37.3%
Animation (Reach staff working with the LAG and others)	£282,900	£104,151	36.8%
Implementation (project costs and associated Reach support)	£1,591,312	£369,942	23.2%
Co-operation (LAG co-operation projects)	£176,812	£22,180	12.5%
TOTAL	**£2,239,624**	**£566,679**	**25.3%**

As there are a number of projects in progress, the level of spend will increase (a further £105,000 is committed to projects but not yet spent). As the table below indicates, a number of the projects have come in under the PSS and are therefore small scale in terms of direct costs. The implementation budget includes not only the direct project costs but also the costs of Reach Rural Coordinators working with project steering groups and others. Reach Coordinator time amounts to some 64% of the implementation spend to date[26]. This is quite a significant level of input. However Reach are often the actual project applicant on PSS projects particularly, and undertaking all the contract management of the studies, working with their steering groups and other partners.

From our project discussions at Reach, it is clear that working with local groups to develop project ideas between the initial Expression of Interest and submission of a full application, and then subsequent working with project steering groups and others during implementation can be quite a labour intensive task. Reach has taken on this task including acting as applicant and contract manager in a number of PSS projects, with considerable support from BCBC. Whilst this is very valuable support, our slight concern is that this may not build expertise or spread capacity more broadly (beyond Steering Groups), which seems a missed opportunity.

Reach financial tables indicate there is a further £105,000 committed to projects but not yet identified as spent and therefore not appearing in the table above[27]. The level of staff spend in relation to project spend is (as a rounded average of experience to date) about 2:1. A further £105,000 committed to projects could therefore see an additional £210,000 staff time investment.

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[26] Note that this cost is inclusive of all staff employment on-costs (NI etc) and a 15% addition for office overheads.

[27] One project (Community Asset Transfer Business Support) accounts for 46% of this.

This would add £315,000 as a commitment to spend in the table above. This would mean spend plus commitments amount to some 39% of total budget[28].

However, it is equally clear that there is still a way to go to commit the full budget in the remaining time period for the programme. This is consistent with the issue facing the whole RDP programme in Wales (although not the experience in every LAG area, for examples RDPW Themes 1, 2 and 3 in Powys are now closed). For some early stage studies, the next steps might be/has been seeking capital funding (e.g. through Rural Community Development Fund or another route such as Heritage Lottery Fund). This would be a successful outcome for the project but does not necessarily commit the LEADER implementation budget. Discussions with project participants does identify some opportunities that may come forward into the TRC Scheme, for example pilot actions following on from a PSS study. In our view there needs to be more of a shift to some larger scale projects to avoid any significant risk of underspend on the programme. We also see a benefit in keeping some PSS opportunities as these have facilitated some early stage activity.

The challenge will therefore be in developing the TRC Scheme to deliver larger scale and further preparatory work, within the parameters of Welsh Government LEADER guidance for eligible activities and spend. We discuss this further in Sections Five and Six, with ideas for this.

Reach has analysed spend by RDPW theme, as set out in the following table:

Spend to July 2017 by RDPW Theme						
RDP Programme 2014-2020 Budget Allocation	Theme 1	Theme 2	Theme 3	Theme 4	Theme 5	Co-op
	22.50%	20%	22.50%	12.50%	12.50%	10%
	£397,828	£353,625	£397,828	£221,015	£221,016	£176,812
Staff spend to date	£88,423	£44,349	£49,726	£21,150	£15,451	£17,502
Project spend to date	£80,326	£1,611	£24,024	£7,296	£4,722	£2,052
Total:	£168,749	£45,960	£73,751	£28,446	£20,173	£19,555
Percentage of theme budget allocation spent to date (April 2015 - June 2017)	42.42%	13.00%	18.54%	12.87%	9.13%	11.06%

‣ Adding value to local identity and natural and cultural resources
‣ Facilitating pre-commercial development, business partnerships and short supply chains
‣ Exploring new ways of providing non-statutory local services
‣ Renewable energy at community level
‣ Exploitation of digital technology
‣ Preparation and Implementation of Co-operation activities by Local Action Groups

This indicates that greatest progress on actual spend so far has been in relation to Theme 1. Kenfig Natura 2000 project, a £94,000 project, is a significant contributor to Theme 1 spend (and indicates the impact of including larger scale projects in terms of spend). Low levels of spend in Themes 4 and 5 is being addressed through the latest Reach Co-ordinator in post who has a specific remit to focus on these two themes, with project ideas beginning to emerge as a result.

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[28] Two projects were also approved at a LAG meeting in July. These are not included in the figures presented here. Collectively they add £52,000 to project costs, potentially £104,000 to staff costs and would increase overall budget commitment by another 7% to 46%.

Theme 2 does have studies in progress that are still to claim. However progress with Theme 2 could also reflect the problem of finding ways to work on more business focused activities whilst still remaining within the Welsh Government guidance for use of LEADER funding. Our discussions indicate a lack of progress in the more economically focused projects.

It is also relevant to note progress with co-operation activities. We are aware that Bridgend LAG, through Reach, has led on some co-operation activities around local food networks, following a scoping study of potential areas for co-operation with other LAGs in Wales. This work has now progressed into a main RDP project on food supply chains with a total budget of some £600,000 and involving eight LAGs, having been initiated through LEADER. This is a successful outcome for the collaboration. However it does mean that there is considerable further work to do to progress co-operation opportunities within LEADER and to utilise this budget line. We understand that the Food Supply Chain regional project progressing through the main RDP programme intends to generate LEADER co-operation projects via the clusters of producers it creates.

4.2 Progress with Output Indicators

All LAGs are required to report on output indicators, agreed as part of approval of the LDS. The LDS output indicators (and one Programme level indicator being the first one in the table below) are set out by RDPW theme in LDS's the intervention logic table and are summarised in the diagram in Annex Three. All projects are expected to make a contribution to these indicators[29].

The following table sets out the indicators that are targets for the Bridgend LDS and the reported progress[30] against these to date:

Indicator	Target	Achieved to date
Jobs created through supported projects	4	0
Number of feasibility studies	20	16
Number of networks established	5	0
Number of jobs safeguarded through supported projects	4	0
Number of pilot activities undertaken/supported	10	0
Number of community hubs	10	1
Number of information dissemination actions/promotional and/or marketing activities to raise awareness of the LDS and/or its projects	63	46
Number of stakeholders engaged (stakeholders engaged through networking, animation or consultation)	285	137
Number of participants supported (people attending information dissemination events and awareness sessions)	370	273

Achievements to date very much reflect the nature of much of the activities so far, largely being small scale preparatory studies. Some of the projects supported will lead to further achievements against output indicators. For example the Welsh Tourism Ambassadors project has created a

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[29] The indicators are requirements of the RDPW and indicator definitions and code numbers are set out by Welsh Government

[30] We have taken the information as reported by Reach. Testing the evidence for this has not been a specific part of the evaluation as we are not undertaking an audit as such. However the Reach PI recording sheet does list the output evidence held for these.

network of Welsh speaking tourism ambassadors who are now linking with an existing network of ambassadors to develop a sustainable network for the longer term.

However it is harder to see how some of the output targets will be achieved e.g. jobs, community hubs[31]. Some outputs will only be delivered after the completion of the project and could take some time to develop. Reach will only be able to report on these if it continues to retain links to projects once complete and this is part of the monitoring agreement. It might not be possible to report them anyway, if they then relate to a subsequent funding programme. Either way, maintaining contact with projects beyond the contractual period will be important to ensure feedback on outputs achieved and being able to report against targets (if this is possible). In any event, the impact of the projects supported will only be fully understood in the longer-term.

Discussions with project participants around outputs indicate that whilst output targets might not always be achieved quite as anticipated, sometimes there are good reasons for this, or other (unexpected and positive) outcomes might also emerge. Examples include:

- Although less Welsh Tourism Ambassadors were recruited than hoped for in one project, there have been unexpected benefits in their enthusiasm for blogging on the Bridgend Tourism Association website and in re-energising the Tourism Association's Ambassador network
- The same project had an output target for undertaking 150 visitor surveys at the Urdd Eistedfodd. This was not achieved partly as a result of using a new online survey system where the technology was not fully tested in advance

Discussions also indicated that for some projects, it is too early to say whether outputs will be achieved, whilst others where studies are completed but have still to report on outputs.

Reach also hold the outputs reporting information by RDPW theme. This shows that Theme 3 has most reported feasibility studies to date, also most stakeholders engaged whilst Theme One has most participants (largely through the activities and events of Kenfig Natura 2000 project).

Output targets which could potentially be hard to achieve are those related to jobs created and safeguarded, even though the targets are small. The small-scale nature of projects supported to date is unlikely to directly lead to job creation or safeguarding. It is possible that initiatives such as the CAT Business Support initiative could create a job (at least on a temporary basis whilst the support programme is in progress). There could be some indirect job creation/safeguarding, for example through CAT and the development of a viable community facility which goes on to employ staff. However in such situations it could be difficult to directly attribute the job to the LEADER funding, rather than any subsequent funding which will more directly delivers the facilities and activities. In previous programmes, job outputs have been a direct result of support to the commercial operations of businesses. As detailed previously, this is not possible in the current programme so inevitably it will make job targets harder to achieve and more indirect.

Projects may also have other indicators. The Kenfig Natura 2000 project is an example of this where the matched funding from NRW also included targets for meeting a number of NRW indicators. However its development of indicators pre-dated the Performance Framework set out for LEADER and LAGs and so outputs were retrofitted[32].

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[31] For example, it is our understanding there has been one community asset transfer that has been successfully completed to date as part of the wider CAT agenda. Whilst more are expected to be completed, there remain some significant hurdles to contend with

[32] A separate evaluation report has been produced for the Kenfig Natura 2000 project which reviews the outputs in more detail.

Having reviewed a number of project applications as part of this evaluation, it is not always clear what the proposed project outputs are. Some set these out, others do not. Some project appraisals we have reviewed do discuss outputs and whether these are realistic. We reviewed one project where an output target was revised upwards during appraisal but then was only partially achieved during the project for various reasons including a technical difficulty. Applicants and appraisers do need to fully understand how the outputs are derived and the assumptions underlying them. To this end all project applications do need to clearly set out proposed output targets and the assumptions on which they are based.

We understand that a cumulative record of targets, commitments and achievements is made to the LAG and we have seen the spreadsheet on which this is based. This will keep a focus on progressing and achieving indicators as well as contribute towards better developing and appraising projects in terms of defining output targets. It should also help to focus applicant and appraiser attention on output targets still to be achieved and how projects coming forward can contribute to these.

4.3 Conclusions

Our conclusions in the following table are based on the current approach to delivery of the LDS in rural Bridgend. We have represented our assessment of progress using a 'traffic light' approach.

	With the addition of known projects in development and those approved at the recent LAG meeting in July, **the LEADER budget could be up to 45% committed.** This is a good achievement given the delayed start to the programme
	However, **actual spend to date only amounts to 25% of budget** and staff resources on implementation might vary from the assumption in the calculations we have made. There is therefore a need to look more widely at what is encouraged forward into TRC over the remainder of the period to ensure support is given to some larger-scale initiatives as well as maintaining the potential of the PSS (which does seem to have been welcomed as a route to achieving early stage preparatory work). We feel there is a strong requirement to shift emphasis onto larger project spend such as pilot actions. We also feel it important to continue to monitor the relationship between Reach staff implementation costs in relation to project costs in order to check progress on overall spend and commitment. This is important in order to ensure programme spend is achieved, otherwise there could be a risk of underspend.
	In terms of output target, it is clear that **some are well on the way to achievement.** These very much reflect the type of activity that has taken place so far and shows good progress mainly on outputs related to participation. **Others have not yet been addressed.** We can see that some of these might be difficult to address given the combination of LEADER guidance and the way in which Reach and the LAG have worked so far through the PSS approach. We can also see that some might only be reportable after a project is complete, which then requires Reach to continue some monitoring activity with projects after completion of spend. It would be valuable to maintain an ongoing and cumulative reporting of outputs to the LAG. This should be a valuable input into ongoing project development (and appraisal).

Excellent   Good   Satisfactory   Needs improvement   Poor

5. Progress on LDS Strategic and Delivery Objectives and RDPW Themes

5.1 Progress towards LDS Objectives: the figures

Looking at projects supported (and the two approved at the recent LAG meeting), these indicate the following in terms of progress against delivery objectives:

Delivery Objective	Number of projects	Delivery Objective	Number of projects	Delivery Objective	Number of projects
SO1.1	1	SO2.1	2	SO3.1	0
SO1.2	6	SO2.2	0	SO 3.2	4
SO 1.3	2	SO2.3	2	SO3.3	0
SO 1.4	1			SO 3.4	1

In absolute terms, the TRC Scheme has supported the most projects in:

- Delivery Objective SO1.2 (sustainable rural services, new ways of providing non-statutory services) – through CAT related projects and early stage support to community facilities initiatives
- Delivery Objective SO3.2 (renewable energy opportunities and developing the green economy), in part a result of two of the early studies undertaken by Reach which were badged under this delivery objective

Linking these back to LDS Strategic Objectives, indicates that the most projects are contributing to Strategic Objective 1 'A Place to Live'. There is less progress on either of the other two Strategic Objectives simply in terms of project numbers.

Those delivery objectives where there have been no projects are the ones most closely related to rural enterprise development:

- SO2.2. – joint marketing initiatives with rural enterprises and others promoting the rural Bridgend offer in different sector 'markets'
- SO3.1. – focused on addressing out-commuting issues and creating opportunities for community based earning
- SO3.3 – activities that identify diversification and entrepreneurship opportunities

From discussion with Reach, stakeholders and review of LEADER guidance from Welsh Government, we appreciate the restrictions on achieving direct engagement with businesses in the current programme and the different approach that this RDPW has taken from the previous one, in relation to LEADER[33]. Nevertheless we think it is important to find a way to bring forward some more enterprise focused projects, as they will support achieving Strategic Objectives 2 (A Place to Visit) and 3 (A place to work) of the LDS.

Given this we have briefly reviewed how other LAGs in Wales have developed projects that might engage with businesses. Examples include:

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[33] *Under the previous 2007 – 2013 programme, grants were directly available to businesses and hence it was easier (there being a direct incentive) to engage with businesses. This time the LEADER measure does not have any state aid cover, and Welsh Government deems it 'ineligible to provide aid or other assistance that would constitute State Aid in respect of a business, enterprise, undertaking or economic operator' in the context of LEADER.*

- Photography bank, for use by tourism businesses (Regenerate NPT)
- Study into shared workspace and artspace (Vale of Usk LAG)
- Breaking down the barriers - creating quality rural markets (Vale of Usk LAG)
- Eisteddfod Country Kitchen (Vale of Usk LAG)
- Food producers workshop (Arwain Sir Benfro)
- Co-working space / work hub (AGW)
- Welshest Business Awards (AGW)

One further point to note is that this evaluation is focusing on the TRC Scheme and its direct expenditure. However, the LAG is also asked for comment on fit with the LDS on projects seeking funding directly from the Rural Community Development Fund[34]. These schemes can also help to progress the LDS. To date seven projects have come forward for LAG comment, of which four have gone to the LAG for comment with two progressing progressing through the application stages for the RCDF, which is made directly to Welsh Government. Both of these are for community facilities and will contribute towards LDS aspirations around delivery of services and development of community hubs (Strategic Objective 1). Of the five which have not progressed, three were also for community facilities and two related to energy. This is a very positive way of seeking to 'join up' two programmes – and could be a principle that could be used locally to link programmes together to support LDS delivery and impact.

5.2 Progress towards LDS Objectives: other perspectives

However progress is not simply a factor of number of projects. Other qualitative factors are also important in reviewing progress towards LDS objectives and we review four here:

- Prompts for projects and how well projects align to LDS objectives (two factors), as this helps to indicate whether the most appropriate projects are being encouraged and supported into the TRC Scheme
- Additionality of projects, in the respect that it is supporting projects that are unlikely to happen in any other way, and therefore targeting funding where it is most needed
- Sustainability of project activity beyond the LEADER funding, thus ensuring there is some enduring contribution towards LDS objectives

Prompts for Projects

Discussion with a range of project participants has highlighted points around how project ideas have emerged, which relate back to achieving LDS objectives:

- Some projects have/are emerging as the result of a specific push by the LAG and Reach to address an RDPW theme. This is particularly the case for Themes 4 and 5 (renewable energy and using digital technology). The impetus for this seems to be the RDPW themes though, rather than the LDS objectives gaps. As noted above it is the LDS objectives related to working with rural businesses which are a main gap now from the LDS perspective (although one project approved at the last LAG meeting is business focused)
- Some projects have developed in a wider context of decreasing local authority budgets. The subsequent policy and financial focus of local authorities have been to look at new ways of supporting communities with less available resource, and to reduce their liabilities. The community asset transfer agenda is a notable example of this. Whilst this has been an understandable policy response, and has fitted well with the LDS delivery objectives around

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[34] A capital funding opportunity, also funded through the RDPW and supporting schemes focused on alleviating poverty and addressing social exclusion.

new ways of service delivery, some of the consultees have questioned whether LEADER funding was being used as an alternative to direct local authority provision

- The Urdd Eistedfodd being held in Bridgend also acted as a specific prompt for two projects, linked with BCBC's destination management activities and the wider relationship with the Bridgend Tourism Association and its growing tourism services role
- Some projects have come from individual enquiries of community groups or organisations wanted to address a specific local need. In one case, the project came from bringing together three different and separate enquiries, to create one project to investigate the potential of a particular sector (crafts).

Projects have therefore emerged both as bottom up, led directly by local groups, individuals and organisations (although less than might be expected for a LEADER programme), and as top down from the local authority and those prompted by direct action of Reach. However our consultations have also highlighted a concern from some interviewees that too many projects are coming through the local authority (with Reach being seen as closely associated with BCBC) and that some projects might be better delivered by third sector organisations rather than through Reach. Within the current model this could be achieved if third sector organisations are commissioned to deliver projects as a result of procurement. They could also lead project steering groups. It was felt that the capability of the third sector was not being fully utilised in the area and there are alternatives to either the local authority itself, or those organisations most closely associated to BCBC. More could be done to utilise the expertise in the third sector organisations and encourage more projects from this sector.

As Reach is the applicant organisation for a number of the feasibility studies taking place through the PSS, and is leading on the Kenfig project and the CAT work, then the perception that TRC is dominated by local authority activity is possibly well founded. However, to counter that, our understanding is that Reach is the applicant as this then facilitates other organisations to be able to bid to deliver some of the feasibility work whilst also providing a robust contract management role. Reach need not be the applicant – there are projects where this is not the case, for example Garw Valley Sports based community hub preparatory feasibility work. It would be possible for other organisations to lead on project activity.

It is clear from the number of enquiries that have not been appropriate for TRC, that achieving a fit with the LDS and the rules of LEADER funding is not always easy. Our consultations have also highlighted that knowledge of the LEADER programme in the wider community is not widely understood[35]. We see this as a communication issue for two reasons:

- A need for Reach to be more proactive in going out and about to promote opportunities (rather than waiting for queries to come in) and working more substantively with third sector organisations to do this in relation to community based projects
- The problem of explaining what this Programme can do (preparatory work, pilot projects etc) when this is sometimes unclear anyway, and contacts are familiar with the previous programme and its grants opportunities rather than the very different approach currently. Some other LAGs produce clearer and more detailed lists of what is, and is not, eligible (eg Arwain Sir Benfro). It would be useful give more clarity to what might be possible.

We discuss this further in Section 7, proposing ways in which Reach might now seek to improve on communications.

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[35] One issue raised by more than one consultee was a view that supported projects appeared to be not necessarily for the principle benefit of the rural programme area, but could be seen as accessible by all of Bridgend (including the urban parts) and this was questioned.

Aligning projects to LDS Objectives

Discussions with project participants indicate some quite mixed perspectives on this. Key points emerging are:

- Reach staff often take a lead in making these links
- Some participants on steering groups for studies are not aware of the LDS or the RDPW themes anyway – they are focused on that specific project rather than its wider context
- Consultants undertaking studies commissioned through the PSS can be asked to make these links as part of their work (although project applications will have made these links initially)
- Some participants can point to clear alignment of their project and the LDS objectives

What this is indicates is some mixed understanding of the LDS objectives, with not all participants fully aware of these. It would be valuable to ensure that all steering group representatives have a 'LDS induction' in order to set a project in the wider context.

Online survey responses from stakeholders indicates some positive responses on the question of whether respondents considered projects coming forward were contributing to important issues for rural Bridgend. Of the 14 respondents to this question, the issue receiving the highest number of 'yes' responses was adding value to local identity and natural and cultural resources (although this was also the issue receiving most 'no' responses too, at 21%). Creating self-sustaining communities received the second highest 'yes' response at 64%. Those issues receiving the highest response in terms of where people felt they were not involved enough to know were in relation to renewable energy, exploiting digital technology and supporting pre-commercial developments and business partnerships[36]. Although there may be some limitations to these results, they are overall positive in that projects are contributing to some important issues.

Review of the project list provided by Reach (used for the table in Section 5.1) also indicates that projects are allocated under one LDS delivery objective and RDPW theme – although some may in practice make contributions to others. An example would be the recently approved Bridgend Business Online Forum which aligns itself principally to one RDPW theme and one delivery objective but also refers to three other LDS delivery objectives that it can contribute towards. It would be useful for the Reach project recording system to pick up these further connections as this would help to provide a fuller view of progress with the LDS objectives.

Additionality

Discussions with project participants have probed the question of additionality – whether the project would have proceeded in any other way if the LEADER funding through TRC had not been available.

The strong message coming from this is that it is highly unlikely that projects would have proceeded without the TRC support. For example the work on Community Asset Transfer) was already in progress. However consultation indicated the development of the toolkit would not have happened without the TRC support whilst the integration of the project into LEADER and the LDS meant that a specific rural focus was included in the work it was doing, which would not otherwise have happened.

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[36] *These results do reflect the profile of respondents too, in that 29% of respondents came from heritage related organisations and 35% from community organisations.. 35% of respondents also said they only knew about Reach and TRC through publicity and a further 35% that they had talked to Reach about project ideas which had not progressed.*

Although this is the view coming back from those in the sample of projects we reviewed, it does help to indicate the additionality of the projects, meaning they are adding to activities in rural Bridgend. This is very positive and a valuable contribution to the LDS.

It can be made even more valuable in two ways: building on this initial project activity by networking across projects; and linking into other programmes to learn from experience. This will make the overall impact in terms of achieving LDS objectives stronger.

Project Sustainability

Discussions around project sustainability (what will happen once the activities funded by TRC are complete) indicate that projects do have potential paths to progress activities – whilst also recognising that in part this is dependent on early stage studies highlighting the potential for this and this is why feasibility work is needed.

We are aware from our project discussions that projects are moving on in various ways, including:

- Onto other funding streams to progress a project more substantively. This has included moving on to the RCDF, RDPW main programme and HLF funding streams as well as identifying next stages that could come into the TRC main programme
- Building on activities so far to support moves towards organisational self-sustainability – although also recognising that some additional activities may be needed to support this and achieving self-sustainability may take some time
- Identifying specific project(s) potential which themselves may need further scoping and development, perhaps through TRC or other routes
- Developing further services/products (and which could move towards more commercial opportunities and beyond the scope of TRC and LEADER funding)

This is important for the LDS as having ongoing longevity means that LDS objectives are achieved more substantively.

What would be useful for the remainder of the programme period is to maintain some contact with projects progressing beyond TRC where possible, so that some information on next steps is fed back – again to help provide a fuller picture of progress with the LDS.

5.3 Conclusions

Our conclusions in the following table are based on the current approach to delivery of the LDS in rural Bridgend. We have represented our assessment of progress using a 'traffic light' approach.

	Progress has been made in relation to a number of the LDS delivery objectives with the exception of three, all of which relate to rural enterprise development. In overall terms, the greatest number of projects are contributing to the LDS's Strategic Objective 'A Place to Live'. However this is based on an analysis where projects are identified as primarily contributing to one delivery objective. In practice projects can make contributions to more than one objective and noting these wider contributions, even if not quantified, would help the wider linking of project activity in relation to LDS intentions.
	Consultations indicate that there is **a strong and positive level of additionality** to the projects that have taken place so far, based on 6 (of 17) projects.

Excellent   Good   Satisfactory   Needs improvement   Poor

Recommendation for developing LDS delivery

A concern that has arisen from consultations is that, in the light of local authority funding cuts, LEADER funding may be substituting for what was previously mainstream activity. There is also concern that TRC may be too dominated by local authority activity. These are perceptions that we feel should be considered. For instance, it may be possible to explain more clearly to stakeholders the considerable level of financial, in-kind and political support that BCBC provide.

The LAG and Reach should consider taking a more pro-active role through better communications and engagement with other organisations that could also deliver activity. We equally acknowledge the issues of aligning potential project applicant aspirations with LEADER guidelines. Again, we feel this is an issue of communication, making it clear what can and can't be supported by the programme. Building on the examples that Reach now have would be a positive step.

6. Progress towards LEADER principles and wider LDS impacts

This section looks at the wider impacts of the LDS and TRC projects and the delivery of the LEADER approach.

6.1. Wider LDS Impacts

We have already touched on wider impacts in terms of sustainability of project activity, giving longevity to impacts in line with the LDS. In this section we look at other impacts covering:

- Contributing towards cross cutting themes and their integration into project activity, including:
  - tackling poverty and social exclusion
  - promoting and facilitating the Welsh language
- Unexpected events impacting on progress
- Project successes and challenges and other impacts

Contributing to cross cutting themes

There are four cross cutting themes in the LEADER programme which are equal opportunities and gender mainstreaming, alleviating poverty and social exclusion, achieving sustainable development and using the welsh language. Welsh Government LEADER guidance states that projects address one or more of the cross cutting themes 'where it is appropriate to do so within the context of the project..'. There are no specific output targets associated with the cross cutting themes. The main RDPW Programme document gives a brief description of two cross cutting themes as:

- *'The Equal opportunities theme aims to reduce injustice and promote social cohesion'*
- '*Tackling poverty and social exclusion will focus on actions to create employment and progression opportunities and will help people to access those opportunities'*

The LDS intervention logic table identifies cross cutting theme potential in relation to LDS delivery objectives. This sets out which of the four cross cutting themes are expected to be relevant to each LDS delivery objective and how project activity in these might contribute to the cross cutting themes.

Our interviews, surveys and review of project documentation indicate quite a mixed response to the question of the cross cutting themes:

- For projects which are early stage studies, cross cutting themes are addressed directly in terms of e.g. locations for consultation events (accessibility), ability to participate in research in Welsh and English (welsh language). The content of the research itself may identify opportunities which are linked to the cross cutting themes e.g. potential to work with hard to reach groups
- Projects rarely make links with all four of the cross cutting themes at application stage (and this is not unexpected). Review of project applications, supported in some interviews, suggest that there is a focus on one or two, most suited to that particular project
- Review of project applications also indicates that some applications make more of a cursory link than others. Given the scale and type of some of the projects supported this is perhaps unsurprising. However, having the question on the project application is also noted as ensuring that at least some consideration is given to it[37]

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[37] *Although the full application includes this as a general question in terms of contributing to the cross cutting themes, rather than an explicit statement of all four themes. In some application forms there is no specific response to this question.*

- Discussions with project participants has made links with cross cutting themes. However this is very much done retrospectively – and more accidentally rather than deliberately. For example the Welsh speaking ambassadors project recruited more women than men- but this was not planned for. The stakeholder survey provided little feedback on cross cutting themes, the majority view being that respondents did not know whether projects had supported these or not

- In terms of the four specific themes:
  - There have been two projects explicitly about using the welsh language, both successfully concluded and both of which open up an opportunity to see how the project outcomes (welsh speaking ambassadors and welsh place names resources) could be linked with other projects e.g. linking welsh ambassadors to Kenfig Nature Reserve (and its follow on project) to widen visitor engagement there. The LDS intervention logic table aligns the welsh language cross cutting theme specifically with LDS delivery objectives 1.3 and 2.2, although the two projects using welsh language cover delivery objectives 1.3 and 2.3. Beyond this, welsh language contributions seem generally dealt with in terms of meeting Welsh Language regulation requirements
  - Sustainable development has been addressed in several projects in relation to financial and organisational sustainability. Other examples include sustainable management of sand dunes. Welsh Government LEADER guidance (or the RDPW Operational Programme document) gives no specific interpretation of this cross cutting theme. The LDS intervention logic table anticipates sustainable development could include linking green infrastructure and renewable energy opportunities, business diversification into community led service delivery, supporting the building of sustainable rural communities and developing cluster approaches in the local business economy
  - Equal opportunities and gender mainstreaming seems generally addressed through general statements e.g. supporting consultations or engagement with people regardless of age, ability, gender or sexual orientation; making opportunities accessible to all. One comment concerned accessibility of the Reach offices by bus as problematic – and limiting equal opportunities (through access). This is relevant as a lot of project meetings are held there. The LDS logic intervention table also includes references to supporting people to find meaningful work close to home in relation to delivery objective 3.1 which is, as yet, not addressed through projects
  - Alleviating poverty and social exclusion includes projects working with different groups (e.g. the craft project helping to reduce social isolation of older people in rural communities, the Kenfig Natura 2000 working with primary schools in areas of deprivation). One comment was concerned with a lack of progress on this cross cutting theme, particularly in relation to pathways to employment. The LDS intervention logic table references this cross cutting theme most, in relation to a number of the LDS delivery objectives including baseline research to identify types of rural poverty, increasing social inclusion, encouraging a stronger sense of place, and encouraging volunteering (particularly related to health and wellbeing, green spaces and recreation).

Our review of cross cutting themes suggests quite a mixed result, with some projects having a cross cutting theme element almost embedded as central to the project whilst others having this as a very peripheral element. If projects move forward into more substantive pilot elements with TRC support it would be valuable to give the cross cutting themes more explicit consideration, not just for the virtue of addressing the four themes but because the themes are also very relevant to delivering the LDS objectives.

The LDS and the intervention logic table also refer to the Uplands in the cross cutting theme context, although it is not one of the four that projects are asked to consider. Our project review has not identified any references back to the Uplands, which is only likely to be relevant to any projects in the north of the rural Bridgend area. Reach and the LAG should, for the sake of clarity, minute that this is not a cross cutting theme projects are expected to act on, if this is the case (for the avoidance of doubt in any future evaluation).

Unexpected events impacting on progress

In terms of unexpected events, the stakeholder survey identified cuts in local authority budgets as a main one. This included a concern expressed about impacts on external organisations. It was felt that, on occasion, organisations who might be better placed to deliver than the Local Authority had funding cut, adversely affecting what they could offer and achieve.

It is not clear whether BCBC spending cuts have specifically impacted on projects already in progress or whether it is a wider comment on the changing financial landscape, although comments do indicate it is impacting on organisations Reach could work with. Some projects (e.g. on finding alternative ways to deliver rural services) are a result of changing financial regimes. There is a similar rationale for the different ways in which organisations participating in TRC might need to be developing themselves, such as the Bridgend Tourism Association taking on some of the roles of tourism information that BCBC previously did.

The impact of financial changes around housing benefit and the wider changes in social care are also noted as impacting on project activity, for example on the potential delivery models that were envisaged at the start of the project seeking to use crafts to support social inclusion work with older people.

Project successes and challenges

Although there have clearly been some issues impacting on project delivery, project participants also note some unexpected benefits and project successes; for example the Welsh speaking ambassadors who have helped to rejuvenate the Bridgend Ambassadors network and introduce blogging to the Bridgend Tourist Association's website, both seen as a big and unexpected bonus from the project.

For a number of projects though, it is still too early to say, as projects are not completed. Challenges in completed projects include, the changing financial/social care environment as already noted and differing policy agendas acting as a disincentive to communities to engage in a project. It seems that some local organisations are not involved because there is nothing for them in the way that TRC is set up. If there are ways to engage them e.g. through commissioning approaches or as Steering Group members, this could help to spread the capacity and engagement of TRC.

One improvement that would considerably help in reporting more qualitative feedback from projects is to ensure that projects include qualitative monitoring of activities as well as quantitative. For example, getting feedback from people attending events and workshops, asking volunteers about experience and skills gained through projects and how this might help them. This is important in testing the impact of projects, testing whether capacity is being built, greater knowledge and experience gained. It will contribute to a fuller picture of progress towards LDS strategic and delivery objectives.

6.2 Effectiveness of the LDS as a strategic enabler of LEADER delivery

The LEADER approach is based on seven principles as set out earlier in Section One. Some of these principles have already been discussed in earlier sections of this report and some will come into Section 7[38]. This section picks up five of the principles:

- Integrated and multi-sectoral activity
- Innovation at the local level
- Co-operation with other LEADER areas
- Developing local networks and encouraging networking
- Achieving a bottom up strategy and delivery including engaging local communities and people in projects

Achieving integrated and multi-sectoral activity

The LEADER principle here is that the area's needs should be explored in an integrated way, rather than focus on development needs of specific sectors, and projects/activities in LEADER programmes should be linked and coordinated. In our view there are two aspects to this from a TRC perspective, one about how needs and activities are integrated within the TRC Scheme itself and a second about how this then links beyond TRC into other activities given that the LEADER funding is limited and there needs to be progression and longevity from its activities.

In terms of integration within a project, our review of projects does show that they can be quite multi dimensional (or have the potential to be when fully developed). For example the rural crafts study is investigating the potential for use of crafts as a means of engaging with older people who are socially isolated – so is addressing both community cohesion and (in a non-commercial sense) business angles. Support for early stage development work around community hubs has the potential for diverse ultimate uses.

What has not come out in discussions is the linking between TRC supported projects to date. This might be because it is still relatively early days and a number of projects approved so far are not yet complete. Nevertheless, we feel there is potential for stronger linkages to be made between projects and this is something Reach could actively facilitate in the next six months as current projects complete e.g. through bringing project steering group participants together or promoting project activity. For example, is there potential to link Welsh speaking ambassadors to the Kenfig Natura 2000 project to give a stronger promotion to Welsh speaking schools and visitors, can the Welsh Place Names research be linked to either of the existing community hub/facilities projects in progress to create a stronger sense of place – or could it be used as a springboard for working in a community in the future.

Beyond the TRC, our review of project sustainability has indicated that projects are using the TRC Scheme as a first stage in project development which will then progress in different ways, either into other programmes or through other development routes. Reach staff are noted as being flexible in helping projects progress beyond the TRC support and make these links.

We have also noted potential for links between TRC supported projects and other local programmes in our discussions[39], The community asset transfer is clearly one as this is a Bridgend area wide activity, with the LEADER programme enabling a specific rural dimension to be given to part of its work. Potential links between the outcome of a TRC study into community led

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[38] An area based approach, set out in a local development strategy – with Section 3 discussing the area in statistical terms and Section 4 the LDS; the Local Action Group –discussed in Section 7

[39] Mainly local authority programmes but this is not to say there may not be others

renewable energy development opportunities in rural Bridgend, and BCBC's role as pilot local authority in national pilot project with the Energy Systems Catapult around de-carbonising heating systems is another. The Reach project Contract Manager and the BCBC project officer for the pilot sit reciprocally on each other's steering group to ensure linkage.

Innovation

Innovation in the LEADER context is about bringing in new ideas or solutions into the area. They might not be totally new – but could be new to the area. Our review of projects suggests that there are new ideas being explored. For example community asset transfer is not necessarily a new idea as such, but it is new to rural Bridgend. The LEADER programme has supported the CAT Toolkit and subsequently the business planning support (so that community organisations considering CAT understand what this entails and have planned a viable facility is an innovation for the area) and discussions indicate this is thought to be quite innovative. In particular, BCBC is viewed as being a relatively leading authority in this agenda.

However, it is not always obvious what the innovative angle is in projects. Innovation is a question prompted in the application process for a full application to the main programme but not in the PSS full application, so not all applicants are being asked to respond to this specifically. Recognising that innovation can mean different things such as being new to area, or application of an existing process or idea in a different situation, the application process needs to ensure the innovation question is included in the PSS as well as the main programme and is explicitly answered in all applications. This would also help to respond to concerns set out in the previous section where there is some perception of TRC funding being used as a replacement for public sector funding following cutbacks. The application process should make clear this is not the case in responding to a question about innovation.

Innovation can also carry an element of risk, in that it is trying something different or new. It is important for the LAG not to be too risk averse as this will stifle innovation. Pilot projects are a good opportunity to minimise risk by allowing 'learning from mistakes' during the pilot phase. It is also important that final reports draw out the innovation and learning from this in projects and that this is disseminated in publicity.

Co-operation with other LEADER areas

Reach initiated a scoping study in the early part of 2015, to explore areas where rural Bridgend could work with other LAGs on topics of shared interest, out of which came a project around food producers and supply chains. Reach went on to work with seven other LAGs (Powys, Neath Port Talbot and the five LAGs in SE Wales) on an initial study supported through the LEADER Co-operation measure and this has now developed into a project through RDPW main programme, with a value of c£600,000.

However, there still remains a considerable element of the co-operation budget to be utilised. We understand that the crafts project is now looking at the potential for a co-operation project with Neath Port Talbot. The potential for a co-operation project with Swansea and Neath Port Talbot on engaging hard to reach groups in the outdoors is also under discussion. In our policy review we also identified some areas of policy development (around City regions) that might have co-operation project potential. The work on community renewable energy opportunities may also be another opportunity. Co-operation need not be limited to LAGs in Wales, but could involve co-operation with LAGs elsewhere in the UK or transnationally. We understand that a French LAG has expressed interest in a transnational co-operation project, on the back of the food supply chain project. To progress these, Reach will need to be proactive in discussions around opportunities.

We suggest that opportunities for involving the LAG (and other community partners) in co-operation projects are explored where possible as this can be a valuable learning experience which the LAG could benefit from.

Developing local networks and encouraging networking

Networking is at several levels in the rural Bridgend LEADER area – at the project level, the rural thematic networks and the LAG level. This subsection looks specifically at the project level. The rural thematic network is discussed in the next subsection and the LAG is addressed in Section 7.

At the project level, our review of projects and project applications shows a mixed response to links into networks and partnerships. Some projects have stemmed from partnership or network organisations such as the Bridgend Tourism Association or a community group. The crafts project has brought together ideas from three different directions and organisations to create a network of project participants. Some projects have or could create networks, such as the network of volunteers at Kenfig Nature Reserve, the Welsh speaking tourism ambassadors now linking into a wider ambassador network and the potential for community groups involved in CAT to develop a network to share experience (something we identify rather than actually happening). Steering groups for projects can also be seen as networks albeit sometimes quite small scale and they occasionally have only with representation from statutory or representative organisations (rather than community groups). Nevertheless they are a useful way of sharing views and experiences and linking activities together. The food co-operation project that started through TRC should be developing networks amongst food producers – and LAGs - as part of the regional RDP funded project.

Our review has therefore identified network links within several projects and noted the potential for further networking beyond project completion. As we have discussed earlier, we think there is potential for Reach to take a more proactive role in networking between projects to exchange experience and links between projects, to look at how networks from projects can be developed (e.g. the volunteers at Kenfig) and to look at how experiences from TRC supported projects can feed back and link into other networks. This will help to add value to what LEADER has supported so far.

Achieving a bottom up strategy and delivery and engaging local communities and people in projects

Our understanding is that the LDS was developed with considerable input from Rural Thematic Groups which are based around different topics; heritage, food, sports venues, community venues, countryside volunteers. These networks helped to formulate the SWOT analysis of the LDS in particular. Reach has a database of 220 contacts based around these networks (which is the database that our stakeholder online survey was circulated to for this evaluation). We cannot specifically comment on exactly how bottom up development of the LDS was, having not specifically tested this. However we do have a concern that these Networks may now be largely disengaged from the LDS, based on the lack of response to our focus group for Network members, the online survey, and comments made through the consultations.

We are aware from our separate work specifically evaluating the Kenfig Natura 2000 project, that this project has hosted quite a number of events which will have brought local people to the Reserve. From our interviews and project reviews we can see that there has been community involvement in projects. For example community groups are involved in the CAT work and Welsh speaking Ambassadors are all locally based. So within projects there has been community

involvement in different ways but this may not be widely known and needs to be captured in final project reports and publicised.

However, given the very limited response to our online survey and from comments received in interviews, we have identified concerns over the lack of knowledge about Reach and the TRC Scheme activities at the local level on an ongoing basis:

- Respondents note a lack of information about what the programme is currently supporting. The online survey identified that the way respondents to a question about how they heard about Reach and TRC was through direct contact with Reach staff e.g. email or request to join a steering group, rather than by wider publicity or marketing
- There is also lack of knowledge and confusion about what it could support (confusion particularly in relation to the previous programme which could support individual organisations and businesses directly)

Our review suggests concerns over lack of local community engagement in project development and delivery. This could be as a result of both of these factors. The online survey indicated that the 12 responses to a question about how widely TRC projects are working with local communities gave a nearly even split between 'a little bit' and 'quite a bit' but only one respondent thought it had worked with communities 'a lot'. This view has been echoed in some consultations. However, we equally recognise that there is a dilemma here which is that of being able to effectively support the levels of interest generated through publicity given that Reach has a finite amount of staff resource.

Our view is that it is important to seek a wider community participation with TRC and publicise how projects have already engaged at community level, which could be done in different ways:

- Now that the LAG and Reach have projects nearing completion and experience to share, our earlier proposals for an event to share experience extensively across Reach's contacts database could be one positive way to do this
- There are communities who have been involved in projects e.g. we understand the Welsh Place Names project held community workshops; and the Kenfig project has held a number of events. It is important to get feedback from these and capture this information in final project reports e.g. through use of feedback postcards at events[40] or videos taken at events. As final reports for a several PSS projects are still due in, it may not be too late to ensure that as much of this type of information as possible is included in the reports. If there are community participation activities still to be held, then including opportunities for feedback from community participants (which we appreciate needs to be commensurate with the scale of activity and participation), could be taken
- A workshop with community representatives and support organisations to take a focused look at community engagement, what is realistic and productive and fills gaps
- Arwain Powys has provided LEADER funding to Powys County Council and Powys Association of Voluntary Organisations to employ two Community Development Officers. They will, in turn, spend some time working with local communities to bring forward issues and project ideas.
- Strengthen working with other community support organisations who already have staff engaged at community level and who may be able to help with communications, community engagement and project development/delivery

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[40] 'Postcard's with a couple of questions which people can complete and hand in at events – and which project leads can hand out at events

6.3 Conclusions

Our conclusions in the following tables are based on the current approach to delivery of the LDS in rural Bridgend. We have represented our assessment of progress using a 'traffic light' approach.

	There has been reasonable progress regarding projects contributing to *cross cutting themes*, some more significantly than others. There is opportunity to develop and improve on this. As larger scale projects develop, opportunities should be taken to look more substantively at their cross cutting theme potential. It would also be valuable to review the opportunities set out in the intervention logic table for the cross cutting themes. Our review indicates some have yet to be addressed – but equally it may be that some are no longer appropriate or may be addressed through other routes e.g use of ESF in supporting pathways to employment.

Turning to the LEADER approach and in terms of the five (out of seven) principles considered in this section:

	Achieving integrated and multi sectoral activity: projects can quite multi-dimensional in themselves and this is to be encouraged. More could be done to develop links between projects and get more added value for the TRC Scheme
	Innovation: new ideas are being tested through TRC projects and it would be valuable for projects to make this an explicit question (with answers) in both PSS and main programme applications, to make more of this element of LEADER
	Co-operation: Reach has already done well in progressing one project from early stages to a main RDPW programme project. There are other opportunities developing for Reach to progress and where LAG involvement would also be valuable to extend the co-operation experience
	Networking: where project reviews show networking within projects and with the potential to network between projects for added value
	Bottom up and community engagement: There has been community engagement and involvement with projects at the individual level but what seems to be lacking is a broader community understanding of and engagement with the TRC Scheme. This is the one LEADER principle where we feel there is a need for some improvement.

Excellent   Good   Satisfactory   Needs improvement   Poor
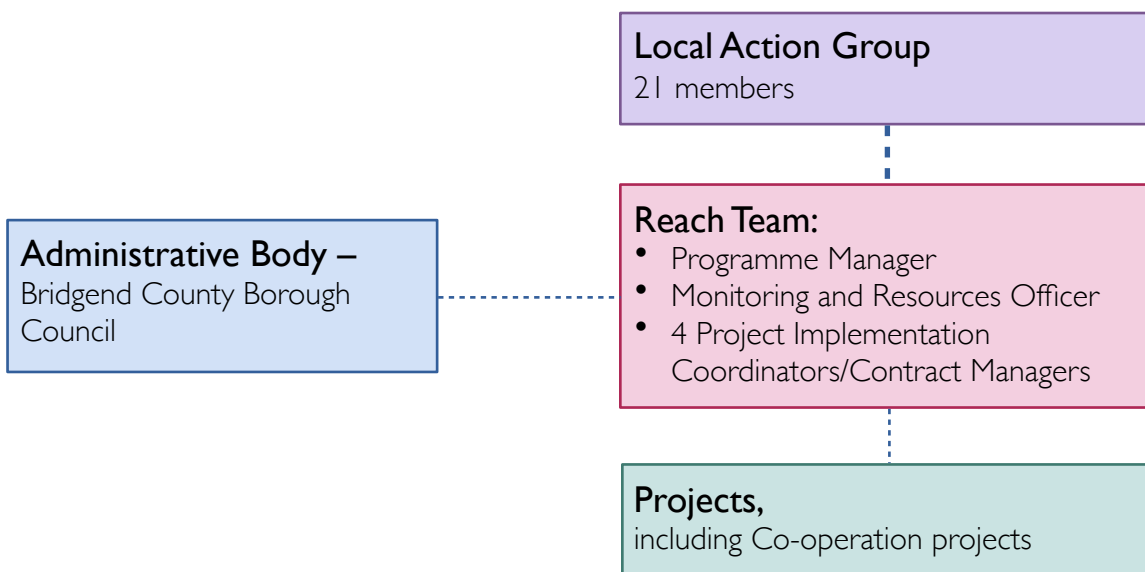
Recommendation for developing LDS Delivery

The main area where we feel the LAG and Reach should look at developing their approach to delivering the LDS is to seek more community engagement – with projects and with the TRC Scheme more broadly. We appreciate the issue of falsely raising expectations through publicity. However, we think there is an opportunity here to improve awareness and understanding at the community level by better capturing feedback from those in the community already involved in projects. By using this more widely, together with other publicity and discussion, Reach could raise understanding and knowledge of TRC.

7 Organisation and Management of LDS and TRC Scheme Delivery

This section looks at the organisation and management of LDS delivery through Reach, the LAG and the TRC Scheme. This is not a detailed audit of processes. It is an overview of processes supporting LDS delivery and intended to address some of the questions posed in the evaluation brief.

7.1 Delivery Responsibilities

Section 2.3 gave a brief introduction to LDS delivery through Reach, with BCBC as the administrative body and the LAG taking decisions on LEADER spend and having oversight of project and LDS delivery. The following diagram summarises this.

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                          ┌──────────────────────────────┐
                          │ Local Action Group           │
                          │ 21 members                   │
                          └──────────────────────────────┘
                                        ┊
┌──────────────────────────┐   ┌──────────────────────────────┐
│ Administrative Body –     │   │ Reach Team:                  │
│ Bridgend County Borough   │┈┈┈│ • Programme Manager          │
│ Council                   │   │ • Monitoring and Resources   │
│                           │   │   Officer                    │
└──────────────────────────┘   │ • 4 Project Implementation   │
                                │   Coordinators/Contract      │
                                │   Managers                   │
                                └──────────────────────────────┘
                                        ┊
                          ┌──────────────────────────────┐
                          │ Projects,                    │
                          │ including Co-operation        │
                          │ projects                      │
                          └──────────────────────────────┘
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7.2 The LAG

The LAG has 21 members drawn from/representing public, private and third sectors and is currently chaired by a BCBC Councillor[41]. The LAG is involved in decision making and our review of project paperwork indicates that they are active in discussing projects and making suggestions or recommendations to caveat approvals. Our understanding is that the LAG receives regular financial and outputs progress reports at its meeting and takes decisions to aid delivery of the TRC and LDS, such as that to bring in an additional Reach staff member to focus on development work in relation to RDPW Themes 4 and 5. Equally discussions suggest different levels of understanding and engagement of LAG members. We notice from review of our project sample that some LAG members are regularly active in subgroups scoring these projects (any LAG member can volunteer to score PSS projects, it is not a specific subgroup).

To be effective as a LAG group, LAG members do need to understand different perspectives, different project approaches and the opportunities of LEADER and TRC. Discussion directly with LAG members indicates a desire to give more time to discuss themes, issues and opportunities.

We recognise that LAG members give their time voluntarily to this, there is project approval and progress reporting business that needs to be done at LAG meetings and that meetings should be

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[41] *Cabinet Portfolio Holder for Education and Regeneration. The LAG Terms of Reference indicate that the Chair and Vice Chair are elected annually and open to any member of the LAG.*

focused to make best use of time. However, in much the same way that we recommend learning from experience of projects so far amongst project participants themselves, this mid term evaluation is an opportune time for the LAG to reflect on similar points. This could include discussions with project participants at an event.

There could also be wider experience to be gained from understanding how other LAGs have addressed themes and current LEADER opportunities. LAG member discussion has identified a desire for more LAG to other LAG discussion. Given that the LAG has supported a co-operation project around food producer supply chains and is considering further possible co-operations e.g. around crafts, this might also be an opportunity for a joint LAG event with existing and prospective LAG partner representatives, to discuss issues and opportunities and give further input into shaping ongoing work for the remainder of the programme period. There could also be joint LAG meetings with neighbouring LAGs (perhaps without staff present to give an opportunity for open discussion).

7.3 The Reach Team

Our discussions and survey work have identified a majority view that the Reach team is very professional in its approach and is providing quality support for those projects that have progressed through TRC. Comments in support of the Reach team and their work include:

- Highly professional and helpful in their approach
- Making a complex LEADER approach as simple as possible in relation to the paperwork
- Communicating well with stakeholders and facilitating the work of others
- A good resource in terms of contract management, compliance with monitoring requirements and other requirements
- A valuable mentor
- Valuable application support and probably applications would not happen without it
- A good central point of contact and information
- A well managed team with a good grasp of the LEADER criteria
- Location at Kenfig (and away from BCBC main offices) gives the team a certain level of independence

Where other comments or concerns have been made in discussions and surveys, these include:

- Need to be more proactive in stimulating a pipeline of projects at community level; and allied to this limited staff resources in Reach with which to do this
- Need to be more active directly in communities and so being able to draw out locally held knowledge
- Need to be more visible, seen at more events and making better use of publicity channels
- A need to develop working with other community and support organisations who might be better placed to lead on TRC projects
- Need to be more proactive in sharing knowledge and experience and bringing good practice into rural Bridgend

Our evaluation feedback indicates that Reach are performing the animation, facilitation and implementation role well, for those they are engaged with. However a key issue seems to be the limited field of project participants they deal with. Again we recognise the dilemma here. There is a finite amount of money available through LEADER for facilitation and animation work, and our experience of LEADER is that this is often fundamental to its success – without people on the

ground to support project development and delivery, little would happen. One suggestion is that a LAG level discussion could to be held with the administrative body to understand resource constraints versus the potential risk of underspend against the programme. This should be a major agenda item on a future LAG meeting within the next six months.

7.4 The administrative body

BCBC acts as the administrative body for LEADER in rural Bridgend. It has provided a very high level of support for the LEADER programme partly by underwriting the matched funding for the overall Programme (£353k) and partly in its role as administrative body. This includes:

- Acting as employer for the Reach team
- Providing financial management for the programme
- Providing marketing and publicity services
- Providing procurement services
- Providing other services e.g. health and safety, legal, property and HR

The LEADER funding does support some of these activities (e.g. office overheads) but BCBC also provide a number services at no cost (effectively in-kind) in order to ensure delivery of LEADER in rural Bridgend. It should be noted that Councillors are supportive of the programme and want to see it succeed.

Whilst BCBC commitment has provided considerable benefits to the programme, our consultations have also uncovered some concerns that Reach and TRC is seen as too local authority focused and not sufficiently independent. Concerns include:

- The LAG is chaired by a BCBC Councillor. (Should the Chair be independent of the Council?).   This is not a comment on the effectiveness of current Chair, who is seen as making a very positive contribution.
- Working with BCBC requirements e.g. for procurement, can make innovation and creativity more difficult
- A perception that some project activity is replacing activities/services that have been the victim of local authority funding cuts

However, their role as administrative body is an important one and clearly provides benefits:

- Access to matched funding which de-risks LEADER delivery from a financial perspective[42]
- Access to support functions that might otherwise come at additional costs
- Access to a range of expertise and information of Council officers
- Political support from Councillors.

7.5 The TRC Scheme

Section Two has described how the TRC Scheme works. We have sought feedback on this, with the consensus being that it is well managed and the paperwork is as easy to use as it can be, within the need to satisfy LEADER requirement. We have also reviewed the main paperwork which seems well organised. There are some minor points that we would suggest that would improve it, notably:

- Ensuring outputs are explicit in applications

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[42] *The Council underwrites the 20% total matched funding for the overall LEADER budget in rural Bridgend. Other matched funding is sought, reducing the Council's overall requirement to contribute. However the fact that it is effectively guaranteeing the matched funding is a significant benefit.*

- Ensuring cross cutting themes and innovation are also more explicit
- Revising the evaluation forms to get more objectivity and clarity in feedback (the questions used in our online survey for project participants could form the basis for this).
- Seeking qualitative feedback from project activities (e.g. consultation events, open days) to demonstrate the impact in relation to the LDS such as capacity building, skills development, wider visitor experience

The way in which the TRC has been developed to provide the PSS 'conceive and commission' approach for small scale initial studies also seems a very positive solution to an issue of getting projects started and operating within the guidance for what LEADER funding can be used for.

Clearly there is now experience of projects which have gone through the conceive and commission route (at the PSS level) and generally the feedback from project participants has been positive on this in that the consultants appointed have been well-experienced with the right skills for the tasks required and steering groups have worked well with them. Reach has acted as the contract manager on all studies and is therefore able to manage the contractual relationship with consultants and keep the work on course[43].

Discussion identified a concern though with the 'conceive and commission' approach in relation to the main programme in that it could work less well and almost mean that the local authority has to be the lead (potentially reinforcing a view that the programme is too local authority centric). The three main projects so far are all local authority led. The Kenfig Natura 2000 project, which is led by BCBC, was an early project into the main programme. Both the CAT projects are BCBC led. Additionally the two recently approved main programme projects both have Reach as their proposing organisation.

There is also a basic point about understanding what the TRC can support, which has been raised in our consultations. There is still a lack of understanding of what could be supported and a perception that because what could be done through the previous Programme is now not possible (particularly a concern around loss of direct grants this time), this is acting as a disincentive to engagement with TRC. For example one online survey respondent noted some project activity proceeding without TRC support *'… because of the bureaucracy, lack of opportunity for investment and barriers placed'* and that some projects had been turned down by TRC with a consequent negative impact *as people …. either feel they have had their valuable time wasted and/or they disengage or start again (frustrated) with new partners, but less bureaucracy'.*

There are steps Reach could take to address this conundrum:
- There is now experience of how the PSS works which can be more readily explained and help to demonstrate what is possible – particularly if there is some project participant peer to peer input into this
- Reach could also look at examples of project delivery from other LAG areas to see if there are other possible routes to explore.

On the second bullet point we have very briefly looked at some other LAG areas – both those based with local authorities so akin to the rural Bridgend model and those with different delivery models such as Planed. Examples to flag up include:

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[43] One project was noted in discussions as having performed less well as the work did not keep to the brief.

- Vale of Glamorgan Dunraven Pop Up events as an example of a pilot project activity with visitor potential
- Mountain Guides Bike Training project in Monmouthshire as an example of a training initiative linked into tourism
- Artisan New Products development project on Anglesey which is focused on products which might be potentially marketable

7.6 Rural Thematic Networks

Reach identifies that Rural Thematic Networks were involved in the development of the LDS and they remain as a valuable set of contacts for Reach. As we noted earlier though, feedback through this evaluation suggests that they have not be directly involved in the LDS and its delivery since then. Some contacts may be involved in specific projects but overall, they do not seem to be a fully engaged set of contacts. As noted in Section 7.5 above, there is now an opportunity to use experience to date, to re-engage with the rural thematic networks.

7.7 Communications and publicity

We have commented on whether more communications and publicity could be undertaken by Reach several times in this evaluation. The Reach team does have an events and marketing budget of which 28% has been spent/committed (as at July 2017)[44]. We understand the concern with promotion just for the sake of it, and the potential for raising false expectations. Based on experience from the projects so far, there is now opportunity for some very positive publicity and communications.However we think there is now a need to develop communications and marketing otherwise there is a risk of disengagement, reputational loss and missed opportunities (e.g. to engage more players and achieve wider impacts through more strategic networking and linking of activities). We would suggest:

- More and stronger use of the website to provide project information. Now that projects are completing there are opportunities to do short videos to capture participant feedback and provide more information about what happened at the local level and where projects are going next – their longer term development. This could help others to understand what is possible. Similarly, an on-line newsletter would provide a great opportunity to both inform and celebrate.
- A range of events to engage with the community, such as taster courses, an outreach facility and attendance at local fetes and shows
- A celebration event (perhaps in 3 months time when more studies will be complete) to publicise project activity with the intention of networking all project participants, LAG members and the wider rural thematic network and other contacts that Reach has. The aim would be to promote what has happened, inspire others to look at TRC, broaden understanding and importantly facilitate cross project understanding and working. This could combine exhibition, presentations from project participants, workshop sessions to discuss particular themes and one to one sessions with Reach staff for people who have project ideas
- A LAG 'awayday' to take time out of core work and reflect/review on project activity, linkages, and gaps. This evaluation report could provide a basis for some discussion but we also suggest it should include a site visit and/or discussion with some project participants

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[44] The budget also covers the cost of Welsh translation when required.

- Wider evaluation feedback and in final project reports to capture more qualitative information of experience especially at the community level – as this can be used to promote experience and opportunities

7.8. Appropriateness of the delivery model for working in the Welsh/local context

The brief asked a specific question about the whether the delivery model described here is appropriate. Our review of the processes and structure of management and delivery indicates that it has been well managed, with the Reach team particularly appreciated for its professional and positive approach and for seeking to make the paperwork of applications and appraisals as easy as it can be. From what we identify from consultations, and bearing in mind we are not auditing the process and delivery structures, it does seem appropriate, with systems in place to gather reporting information.

We have briefly reviewed other management approaches of other LAGs in Wales. Other LAGs across Wales are managed in a variety of ways. Many are under the umbrella of a local authority regeneration or economic development department and a few are managed by wholly independent organisations (often community enterprises). For example, PLANED, Cadwyn Clwyd and Menter Môn all have a social enterprise structure, with panels comprised of public, private and third sector representation. They are seen to have autonomy from their local authority partners

Overall, the benefits of a supportive local authority are clear and have enabled REACH to deliver the current programme with clarity and professionalism. However, consideration might be given to whether the LAG and REACH team would benefit from some additional independence, or at least perceived independence, such as separate e-mail addresses to complement the independent website. The LAG might be able to decide on spending the LEADER funding even if, at times, it does not 'fit' exactly with council policies.

7.9 Conclusions

Our conclusions in the following table are based on the current approach to delivery of the LDS in rural Bridgend. We have represented our assessment of progress using a 'traffic light' approach.

	Management and delivery seems well managed, with the Reach team being very professional in their approach. There are various points where we think there could be further developments that would enhance the overall management and delivery systems in terms of minor developments of the TRC application and reporting paperwork, encouraging qualitative monitoring of project activity and developing the evaluation feedback form to be more objective.
	The LAG appears to be working well in that it regularly meets, is actively engaged with project decision making and is supported by Reach who provide information updates at each meeting, There is potential to develop the collective working of the LAG by giving time to wider discussion beyond just project decision making,. This would provide opportunities for more informal LAG discussions to develop mutual understanding; including with other LAGs to exchange experience.

■	Communications and publicity is the one area where we feel there is a need for some development. It could be developed and more proactive, building on experience to date. This could help to address issues of disengagement and make sure potential opportunities are not missed.
■	Overall our review of the delivery model is that it is working well in the form that it currently is. It has however raised concerns about the delivery model being too local authority centric.

Excellent   Good   Satisfactory   Needs improvement   Poor

Recommendations for developing LDS Delivery

There are three key issue areas that we consider the LAG and Reach might consider, in order to improve on implementing the LDS:

- There needs to be a step change in communications and publicity activities, linking this with more proactive work on community engagement; for example:
  - more information on the website in different forms e.g videos from events
  - attending local shows, fetes and rural events
  - a regular surgery or outreach service, going to village halls, pubs and rural businesses
  - a regular newsletter featuring indicative case studies
  - using of local and community radio
  - running taster courses to stimulate ideas
- There is a need to look at different ways of bringing forward projects into the main programme that are not just from Reach or BCBC.
- There is a need to address the perception of a local authority centric programme.

8. Conclusions and Recommendation

This final section draws together our conclusions in relation to the two key evaluation questions in the Brief, having answered the more specific questions throughout the main body of the evaluation (as summarised in the table in Section 8.3).

8.1 Evaluation of progress in implementing the LDS

Our conclusion is that the LAG and Reach has made considerable progress with contributing towards delivery of the objectives of the LDS on various fronts and notwithstanding the delay in getting the LEADER programme up and running:

- It has spent only 25% of the budget to date –but further analysis of what still remains to be spent by committed projects and what has just been approved by the LAG at its July meeting, suggest that this could increase to nearer 45% of total budget,
- Some of the output indicators are well on the way to achievement (those related to events and stakeholder/participant involvement).
- There has been project activity in relation to all the LDS delivery objectives except three. The highest number of projects relate to SO1.2 (developing sustainable rural services and exploring new ways of delivering non statutory services) whilst SO3.2 also has several projects (renewable energy opportunities and the green economy) although partly because two of the very early studies by Reach, before the LDS was formally approved, were within this delivery objective.
- In turn the larger proportion of projects are feeding back into the LDS Strategic Objective 'A Place to Live'.
- The feedback is that it is quite unlikely that the schemes that have progressed through TRC, would have done so without that funding support, suggesting the project activity is additional
- Projects do align with LDS objectives
- Projects do show pathways to further activity beyond their initial TRC support, meaning that there should be some sustainability and longevity to the TRC support and potential impacts for the LDS.

This last bullet point is an important one to appreciate in the context of the TRC Scheme and the realism of achieving the LDS vision and objectives. The nature of the funding support to date is that it is supporting preparatory studies which, of themselves, are not going to actually deliver the objectives but should pave the way for this. It is the wider impact of the activities that come after the TRC that will help to deliver the LDS more substantively.

There is however, still a need to progress further on several of these fronts:

- There remains a significant amount of budget still to be committed and spent within the remaining timeframe
- Some output indicators have yet to record any achievement against them and it is hard to see how the jobs outputs in particular can be achieved – especially with the PSS type projects undertaken so far
- There are three delivery objectives where there have been no projects. They all relate to rural enterprise development where project development is seen as difficult because of the lack of State Aid cover and Welsh Government guidance for LEADER, meaning no funding can be made directly to individual enterprises

- Less projects are feeding into 'A Place to Visit' and 'A Place to Work' and this needs to be addressed
- Sometimes it seems that it is Reach making the links of project alignment with the LDS on behalf of projects rather than project participants clearly understanding the LDS context
- There are ways in which LAG and Reach now need to capitalise on what has been achieved so far and a need to address some key issues notably:
  - That of engaging with the private sector and progressing the rural enterprise development aspect of the LDS
  - Drawing more community engagement into the LDS delivery
  - Developing on communications and publicity
  - Addressing the perception of a local authority led programme of activity

Our recommendations for developing the delivery of the LDS for the remainder of the Programme period on the current basis are set out in the following table:

Recommendation	Additional Comments
Effectiveness	
Explore different ways to develop larger pilot projects, for example:	Examples from elsewhere that could provide ideas for rural Bridgend might be: PLANED which has developed the rural hub area model, with clustered development plans and integrated projects in Pembrokeshire.
	The Vale of Glamorgan Pop Up Events at Dunraven Bay is an example. This could be a way forward to extend events activity such as those initiated at Kenfig; or to possible pilot activity arising from the renewables research
	Monmouthshire has a Mountain Bike Guides training programme. This type of activity might fit with the developing Garw sustainable sports hub proposal for example, or developing training linked to the CAT work
Develop the knowledge and understanding of project participants of the LDS context	Ensure all project steering group representatives have an LDS 'induction'
Network across projects that have already been supported for added value and greater synergies, to share experience and to develop networks from projects	A celebration event to which all project participants, LAG members, Rural Thematic Group members and other stakeholders are invited could be one way to do this
Open up co-operation projects to more fully engage the LAG	A meeting of LAG members across several LAGs considering a co-operation project could be one way forward
Efficiency	
More proactive work by Reach to promote TRC opportunities making more use of communications and publicity	Use existing project experience to provide more information on what TRC can support Take the opportunity of using this information to re-engage with the rural thematic networks

Seek to engage more private sector representation on the LAG (within the balance of its overall make up)	With a view to developing some rural enterprise related projects utilising their experience and knowledge
Ensure project applications: • Clearly set out proposed output targets • How relevant cross cutting themes are being addressed • What aspect of innovation is being explored Monitoring includes: • Gaining qualitative feedback from activities, events and not just a focus on the numbers And final reports: • Draw out the qualitative elements e.g. progress with key LEADER principles such as innovation, networking, community engagement • Draw out the learning for the future • Set out the paths for ongoing sustainability of the project activity begun with TRC support	
Make use of output monitoring information to inform project development and appraisal and keep LAG members and others up to date on progress	
Continue to monitor relationship between Reach staff implementation costs and project costs in order to check progress on overall spend and commitments.	
Take time at LAG meetings to reflect on project activities, experience and future potential	This evaluation report could be used as a springboard for a LAG 'awayday' to discuss progress to date and the remainder of the programme period. It could include site visits
Impact	
Specifically seek to bring forward some projects that are more focused on rural enterprise development	Examples from elsewhere that could provide ideas for rural Bridgend might be the Be Nesa Llyn project on Angelsey which manages a loan fund for small businesses - with the finance being offered by 11 local business people; or the Photography Bank in NPT which can be used by a range of tourism businesses.
Where possible, maintain contact with projects progressing beyond TRC as this is where the greater impact will arise	This will be provide feedback (even if not outputs) that will be build a fuller picture of LDS achievement.

8.2 Review of the LDS and its ongoing relevance

Our review of the socio economic context and recent policy changes, supported by feedback from consultations, do not indicate that there is a need to change the priorities of the LDS as set out in its LDS.

Socio-economic data has not shown anything significantly different to that used in support of the LDS. In some ways this is to be expected as the LEADER funding is not large enough to have an impact on statistics directly (and especially as a number of feasibility studies have been supported) whilst it is the more substantive projects that follow that will have the impact – although even these might not be big enough to affect the statistics. One area that our analysis has highlighted as an issue that is perhaps greater than reflected in the LDS is that of poor health – and this could give greater impetus to the work of TRC in supporting initiatives that could address health issues.

Changes in policy directions could open up opportunities for TRC on issues in the LDS not yet addressed e.g. in relation to public transport. What it also does is highlight the need to make the links between different programmes more substantively (rather than just noting links in applications) so that there is feedback between programmes and experience and greater linking of pathways forward with areas of work. This is happening in some projects e.g the renewable energy opportunities study.

In terms of the SWOT set out in the LDS, our evaluation does not specifically indicate major changes to this are needed. However, as noted earlier, there are areas where opportunities could still benefit from development in the remainder of the LEADER timescale, such as that of building the visitor offer, public transport and wider use of digital technology (where we know steps have been taken to do this through the secondee into the Reach team).

Local authority cutbacks is noted as threat in relation to one RDPW theme in the SWOT but is a threat across the board including in relation to rural service provision and adding value to cultural and natural resources. Local authority funding cuts have been identified in consultations as an external factor impacting on delivery of the LDS and as a concern to some stakeholders if LEADER funding is almost substituting for local authority funding. The issues of local authority funding, and the support for Reach, could be recognised more significantly, as this situation is not going to diminish. Conversely it could be seen as an opportunity to think more innovatively around alternatives, and work with different organisations on this to achieve synergies and avoid duplication of effort.

8.3 Detailed Evaluation Questions

The brief raised a number of more detailed evaluation questions, all of which are set out in the Evaluation Framework in Annex One. The table below summarises where these questions are discussed in this report and what the conclusion is. It also groups them by reference to the key evaluation questions of effectiveness, efficiency and impact.

Evaluation Question	Section of the Report	Main Conclusion
Effectiveness		
The extent to which the LAG has implemented/is delivering activities which are delivering against the five LEADER themes	Section 4.1	Most progress has been made with Theme 1. Low levels of progress with Themes 4 and 5 are being addressed. There is also a lack of progress with more enterprise focused work and Theme 2

To identify any areas of eligible activity that the Local Action Group should seek to prioritise for the remainder of the current programming period	Sections 4.3 and 5.1	There is a need to shift emphasis onto larger project spend e.g. pilot actions, whilst still maintaining the PSS opportunity. A need to bring in some more enterprise focused projects to address LDS delivery objectives on which there has so far been no progress
How funded projects fit into the wider policy context	Sections 3.4 and 5.2	Projects do make links with LDS objectives but Reach staff often take a lead in doing this which means project participants may not be fully aware of the LDS context in which their project is placed. TRC supported projects should, or are, making links with other strategies and programme and there is potential to do this more substantively
The extent to which projects are integrating the Cross Cutting Themes into their delivery of activities	Section 6.1	Project inclusion of cross cutting themes is variable, from being embedded in a project to being peripheral. Not all project participants or stakeholders may know about their relevance or inclusion in a project. Yet aspects of the cross cutting themes can be quite central to project activities either now or in their subsequent stages after TRC so there is value in giving them greater consideration.
The extent to which projects are taking actions to promote and facilitate the Welsh language	Section 6.1	Two projects have had use of Welsh language as a core rationale. Beyond this it has been principally addressed by meeting Welsh Language regulations requirements

Efficiency		
Extent to which the LDS has promoted collaboration in project development	Section 5.2 Prompts for projects	There is a mix of projects which have emerged from the bottom up and those which are more top down (and with a concern about being local authority based/led). Most projects have a steering group and in some instances these are very clearly promoting collaborations e.g. the Crafts project, Kenfig Natura 2000 project. Exceptionally some PSS projects do not have a partnership e.g. where it is as too early a stage for this.
Factors in the LDS deterring potential project sponsors	Section 7.5	The main issue identified in our evaluation that is deterring potential project sponsors is a lack of understanding of what the programme can fund, allied to a concern that facets of the previous 2007-2013 programme are no longer possible and a perception that there is significant bureaucracy involved (albeit that Reach has done its best to minimise this)
Quality and effectiveness of implementation and management of LEADER (including the commissioning/ pilot project approach)	Section 7	Overall conclusion that management of the LDS delivery/ activities seems well managed with the Reach team being very professional in their approach. There are areas where this could be enhanced through further developments in processes. Specifically on the conceive and commission approach, this seems to have worked relatively well for the PSS but there is a view that it is harder to achieve for the main programme.
Extent to which local resources have been mobilised in the development stage	Section 4.1 and Section 7	Matched funding has been secured for projects at the local level, including a significant level for the Kenfig Natura 2000 project. Very valuably BCBC has underwritten the matched funding requirement ensuring that local resources will be in place for the programme.

		The Programme has the LAG and Reach team in place, as well as BCBC as the administrative body, all bringing resources to the LDS delivery. The Reach team is quite a small and focused team (compared to the previous programme period) and some activities, notably communications and publicity, have not been extensively undertaken for fear of lack of staff resources to deal with what this might generate. The Rural Thematic Groups were also an important local resource inputting into LDS development but now seem more disengaged.
Appropriateness of the delivery model(s) for working in the Welsh/local context	Section 7.8	In the current context the delivery model is one that has built on previous experience meaning that Reach could make swift progress on a programme that had a delayed start. It has been well managed and delivered professionally and does seem appropriate to the situation. However, it would benefit from more perceived autonomy - and equally from a wider knowledge and understanding of how the local authority does support the delivery model through additional services.
The effectiveness of the Local Action Group and projects' publicity and the consistency of message throughout publicity and information material	Section 7.7	The extent of communications and publicity has been quite limited with only 28% of the budget for this spent so far. There is a need to build this activity up to avoid risk of disengagement by potential participants and stakeholders, reputational loss and missed opportunities
The extent to which local communities and people have been engaged by the LAG	Section 6.2	There is a lack of knowledge about Reach and TRC and concern about lack of community engagement in project development and delivery. This needs to be addressed.

| **Impact**		
Progress of the portfolio of projects toward achieving the LDS objectives	Section 5	Most progress has been made in relation to the LDS strategic objective 'A Place to Live'. There has been project activity in all but three of the LDS Delivery Objectives. The three all relate to rural enterprise development (and feed into LDS Strategic Objectives for 'A Place to Visit' and 'A Place to Work'. This needs to be addressed
Evidence of projects contributing towards the theme of tackling poverty and social exclusion	Section 6.1	This cross cutting theme is the most referenced in the LDS Intervention Logic table. Our review of projects notes that it is included e.g. the Kenfig project is working with local schools in areas of deprivation (although we also note not all projects reference it. This is to be expected as all four cross cutting themes will not be relevant to every project). What is not as yet drawn out of projects is what impact this has had and steps need to be taken to ensure this happens.
Other		
Ongoing relevance of the LDS to the socio-economic circumstances of the area including fit with the changing wider policy context	Section 3 and Section 8.2	Our review indicates that there is no need to fundamentally change the priorities of the LDS.
Effectiveness of the LDS as an enabler of a strategic approach to LEADER delivery	Section 6.2	All seven principles of LEADER are being progressed through the LDS delivery approach but sometimes this is not made very explicit and there are opportunities to build in additional activities that could build stronger LEADER principles and add value to what is already happening. There is a particular need to build broader community understanding and engagement with Reach and TRC

8.4 Recommendations for opening up the delivery arrangements further

There are a number of ways in which LAG and Reach could now capitalise on what has been achieved so far and open up the delivery arrangements. We see this as important in order to address some key interlinked issues:

- Drawing more community engagement into the LDS delivery
- Improving on communications and publicity
- Addressing the perception of a local authority led programme of activity

Our recommendations in order to do this are:

| Recommendation	Additional Comments
Effectiveness	
Seek wider community participation in TRC	Ways of achieving this could include sharing experience e.g. at the celebration event; capturing qualitative feedback from existing events and including this in final reports which are then disseminated; working closely with community support organisations
Address the perception of a local authority led programme	Make more explicit the ways in which BCBC support delivery of the TRC scheme and LEADER in Bridgend; and seek to draw in other organisations into project activity
Efficiency	
More proactive work by Reach to promote TRC opportunities	The team might consider making more use of communications and publicity Use existing project experience to provide more information on what TRC can support Take the opportunity of using this information to re-engage with the rural thematic networks
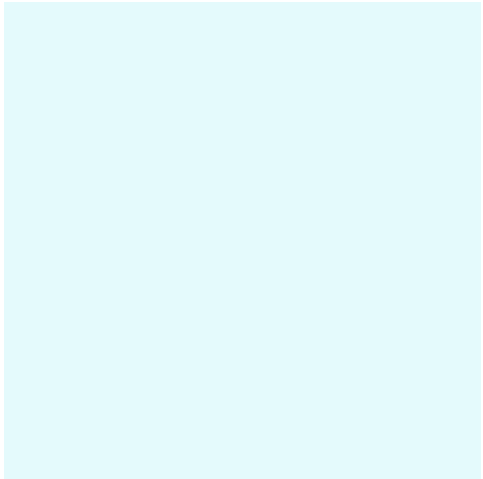
MID-TERM EVALUATION

L·E·A·D·E·R DELIVERY IN RURAL BRIDGEND
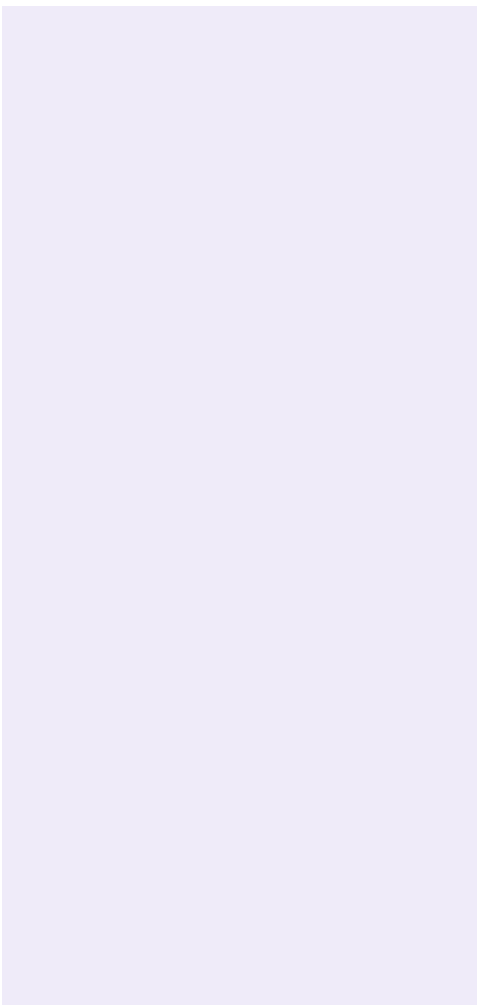
ANNEXES

A report from
Ash Futures
for
Bridgend County Borough Council

August 2017
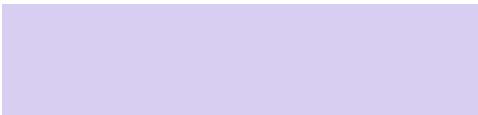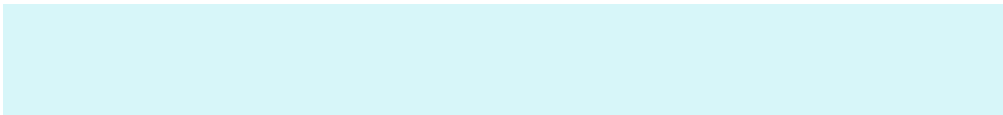
Annex One: LDS mid-term evaluation framework

This is the Evaluation Framework we prepared at the start of the contract, following the Inception meeting. It was shared with the ReachTeam.

Evaluation requirements

The evaluation is at the request of the REACH team at Bridgend County Borough Council. Reach wants to look at progress with delivery of the LDS to date both in terms of its overall delivery against objectives and vision and in terms of programme and project management and monitoring to achieve this. As part of this, Reach wants to know if there is a need for any refresh of the LDS and its intervention logic table and, if so, in what way.

As a specific task within the overall evaluation, REACH has also asked for specific evaluation of the Kenfig Project which is now at practical completion. This project has the single largest allocation of funding from the LEADER funding available through the Bridgend LDS/LAG (the programme being called 'Thriving Rural Communities').

The Welsh European Funding Office (WEFO) are also supportive of mid-term evaluations. They are keen to ensure that if possible there is some commonality to the information from evaluations in order to take an aggregate look at LEADER progress in Wales. Welsh Government has issued guidance for LEADER evaluations which includes ideas for some common questions and guidance on a common report template for evaluation reports. The Bridgend brief has drawn on these common questions and the report template can be used to fit with reporting for this evaluation.

Specific Evaluation Questions

The brief sets out a number of evaluation questions. In setting these questions into our evaluation framework we have first reviewed them in the light of the core purposes of evaluation which are effectiveness, efficiency and impact:

- *Effectiveness.* This looks at how/whether objectives of the intervention are being, or will be, achieved. In the context of this evaluation, this is about how activities being undertaken, as part of Thriving Rural Communities and through the LEADER approach, will help to achieve LDS delivery objectives

- *Efficiency.* This looks at outputs relative to inputs; their cost efficiency, value for money and timeliness, organisation and management. For this evaluation, this is particularly about REACH and LAG management, the organisation and administration around Thriving Rural Communities, and the application, appraisal, delivery, monitoring and evaluation processes

- *Impact.* This looks at the positive (and possibly negative) changes resulting from the intervention and what the consequences of these are. In the context of this evaluation, this is about how activities are, or will, contribute to achieving LDS strategic objectives and vision and/or whether there are other factors external to the programme that may impact on the programme's ability to achieve these

We have taken the questions from the brief and organised these in relation to the three purposes of evaluation described above. This helps to shape what information we aim to obtain from our questions   (qualitative and/or quantitative) and from whom.   Kenfig, acting as a case study through its own evaluation evidence, can also specifically contribute towards some of these questions.

Effectiveness	Efficiency	Impact
The extent to which the LAG has implemented/is delivering activities which are delivering against the five LEADER themes • **Case Study**: Kenfig To identify any areas of eligible activity that the Local Action Group should seek to prioritise for the remainder of the current programming period How funded projects fit into the wider policy context The extent to which projects are integrating the Cross Cutting Themes into their delivery of activities The extent to which projects are taking actions to promote and facilitate the Welsh language	Extent to which the LDS has promoted collaboration in project development Factors in the LDS deterring potential project sponsors Quality and effectiveness of implementation and management of LEADER (including the commissioning/ pilot project approach) Extent to which local resources have been mobilised in the development stage Appropriateness of the delivery model(s) for working in the Welsh/local context The effectiveness of the Local Action Group and projects' publicity and the consistency of message throughout publicity and information material The extent to which local communities and people have been engaged by the LAG	Progress of the portfolio of projects toward achieving the LDS objectives • **Case Study**: Kenfig Evidence of projects contributing towards the theme of tackling poverty and social exclusion

Ongoing relevance of the LDS to the socio-economic circumstances of the area including fit with the changing wider policy context

Effectiveness of the LDS as an enabler of a strategic approach to LEADER delivery

Addressing these specific evaluation questions then means that, at the point of analysis, we can bring the information together to address the three key requirements of the brief:

- **Evaluation of progress in helping to implement the Local Development Strategy** (the whole programme and with Kenfig as an illustrative example)
- **Review of the LDS** and its ongoing relevance in changing social, economic and political circumstances
- **Recommendations** to inform any refresh of the LDS

One important consideration in the evaluation questions is the cross cutting issue about effectiveness of the LDS in enabling the LEADER approach. The LEADER approach is itself built on seven key principles[1], all of which are intertwined in some way in other questions. Therefore we would seek to draw on responses to the other questions (e.g local engagement with LEADER, the operation of the Local Action Group), whilst also taking the opportunity to ask stakeholders and LAG members more specifically about how they view the LDS as an 'enabling' document.
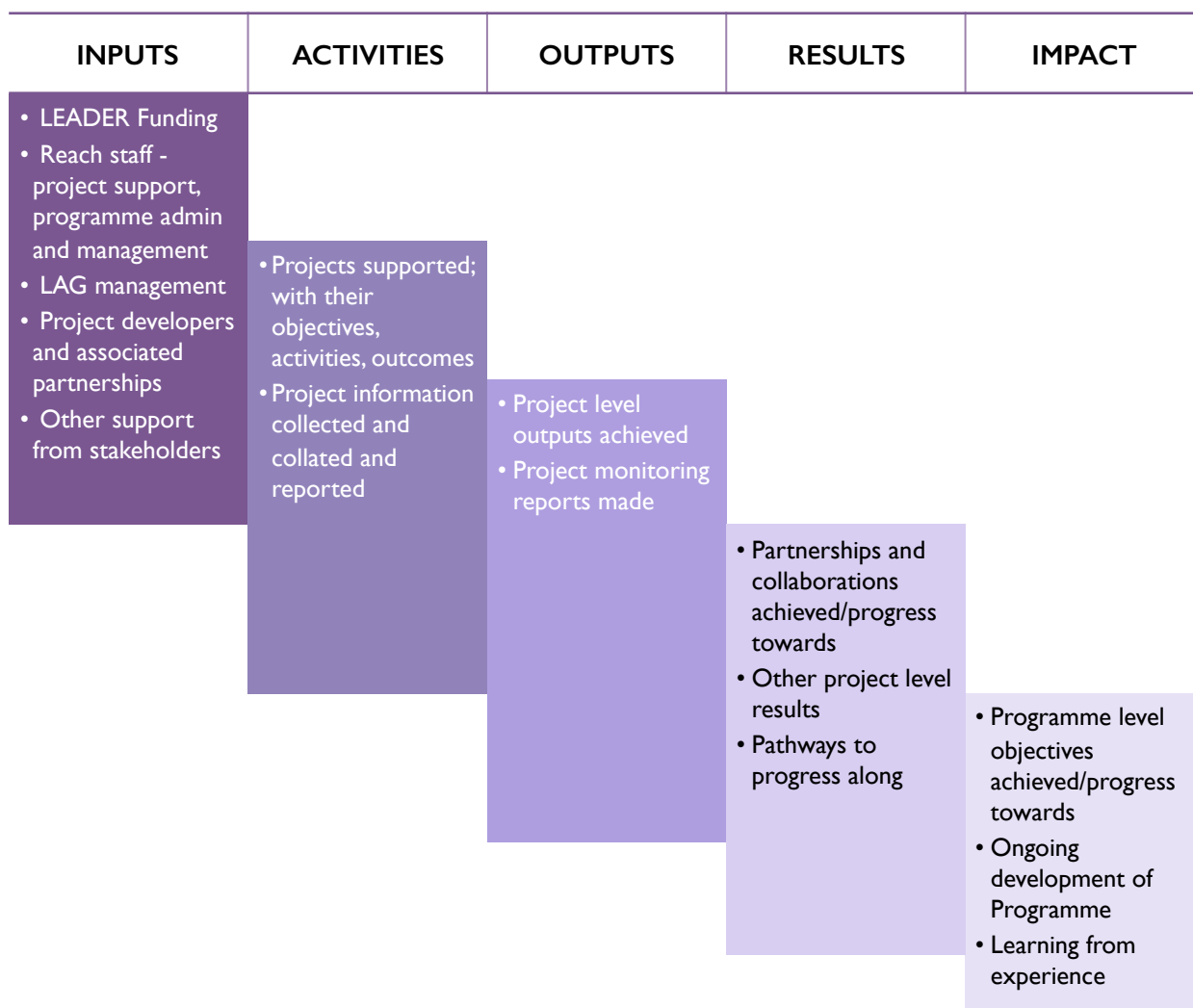
Activities for the evaluation

The table identifies the different activities in the evaluation that will be used to obtain information and scopes these against the evaluation questions:

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[1] *Area based approach; bottom up approach, Local Action Group, Innovative, multi sectoral and integrated activity, networking (at different levels) and co-operation (based on joint project activity with others in other LEADER areas). Having a de-centralised administration is also seen as a key feature of LEADER.*

	Programme and Project Reports and guidance	Socio-economic context review	Policy context review	online surveys	Reach staff interview	LAG consult-ation	Stake-holder interview	Project Interview	Rural Themed Network Focus group	Kenfig Case study including focus group
Effectiveness:										
Delivering against the five LEADER themes	X			X	X	X	X	X	X	X
Priorities for the remainder of the current programming period		X	X		X	X	X		X	
Fit into the wider policy context	X		X		X	X	X	X	X	X
integrating Cross Cutting Themes into activities	X			X	X				X	X
Promoting Welsh language	X	X	X	X	X		X	X	X	X
Efficiency										
Collaboration in project development	X			X	X			X		X
Anything in the LDS deterring potential project sponsors				X	X	X	X	X	X	
Quality and effectiveness of implementation and management	X			X	X	X	X	X		X
Extent to which local resources have been mobilised	X			X	X	X	X	X	X	X
Appropriateness of the delivery model(s	X				X	X	X	X		
Effectiveness of publicity and the consistency of message	X			X	X	X	X	X	X	X
Extent to which local communities and people have been engaged by the LAG	X			X			X	X	X	X
Impact										
Progress of the portfolio of projects toward achieving the LDS objectives	X	X			X	X	X			X
Cross cutting										
Ongoing relevance of the LDS		X	X		X	X	X		X	
Effectiveness of the LDS as an enabler of a strategic approach to LEADER delivery (specific questions)					X	X	X			

The logic chain

The logic chain sets out how inputs into the LDS and the Thriving Rural Communities projects (by REACH staff, LAG, project developers and others) then helps to deliver the activities which lead to outputs, outcomes and impacts. The outputs, outcomes and impacts should then illustrate how, or if, the vision and strategic objectives of the LDS are being achieved. We have summarised this in the following diagram:

INPUTS	ACTIVITIES	OUTPUTS	RESULTS	IMPACT

- LEADER Funding
- Reach staff - project support, programme admin and management
- LAG management
- Project developers and associated partnerships
- Other support from stakeholders

- Projects supported; with their objectives, activities, outcomes
- Project information collected and collated and reported

- Project level outputs achieved
- Project monitoring reports made

- Partnerships and collaborations achieved/progress towards
- Other project level results
- Pathways to progress along

- Programme level objectives achieved/progress towards
- Ongoing development of Programme
- Learning from experience

We need to set the evaluation activities within the logic chain approach. Again this helps us to structure questions and information gathering, to focus on the areas of information we need to carry out the evaluation.

	Inputs	Activities	Outputs	Outcomes	Impacts
Programme and Project Reports and guidance	X	X	X	X	X
Socio-economic context review				X	X
Policy context review	X			X	X
Online surveys		X	X	X	X
Reach staff interviews	X	X	X	X	X
LAG consultation	X	X		X	X
Stakeholder interviews	X	X		X	X
Project Interviews	X	X	X	X	X
Rural Themed Networks Focus group	X	X		X	X
Kenfig Case study, and focus group	X	X	X	X	X

Scope of our Evaluation Activities

The following section scopes what information we need to collect through the activities as set out above to:

- respond to the list of evaluation questions
- provide the information across the three purposes of evaluation
- provide the information across all points of the Programme logic chain
- enable conclusions and recommendations to be drawn

Socio Economic and Policy Review

- Update (where possible) data in the LDS; and look at recent trends over time
- Additional data (where readily available from published sources) to extend socio economic review in relation to the LDS strategic and delivery objectives and the RDPW five themes; also cross cutting themes and SWOT where any additional and useful data
- Conclusions on change/trends and potential impact/implications for ongoing needs and opportunities in the LDS
- Policy checklist from LDS for reviewing existing policy fit in project reviews
- Policy review of emerging key policy areas with potential impact on LEADER and rural development over the remainder of the current Programme period to 2020. Those listed in the brief are:
  - The City Regions
  - The Capital City Region Growth and Competitiveness Report from November 2016
  - The Wellbeing of Future Generations Act
  - The Wellbeing Assessment for Bridgend County Borough
  - Wales Natural Resources Policy (Draft)
  - Welsh Language Standards
  - Environment Act
  - Revised Welsh Government Guidance on the delivery of LEADER
- Others may be identified and will be reviewed if this seems essential to do.

Documents Review
- Project application forms; all projects
- Project appraisal and monitoring forms; 6 projects
- WG RDPE/LEADER Guidance
- LDS and its intervention logic chain

Surveys and Questionnaires

The following sets out the areas for questions for the surveys and interviews[2]. Several questions/ areas that are important to the evaluation will be asked of different audiences. The benefit of this is that we will aim to form an overall view, taking into account different stakeholders.

- **Online surveys** (these will use Likert scales where possible e.g. 'on a scale of 1 to 4 how would you rate…..' Most will be relatively closed questions, some with opportunity for adding qualitative comments):
  - All project contacts. Our list to cover would be as follows
    - Experience of being involved in project development (including project themes)
    - Experience of project application (EoI and full application) – and any deterrents
    - Experience of working with REACH
    - Partnerships developed in project development and delivery
    - Delivery against project aspirations (outputs and objectives)
    - Finding matched funding and resourcing project delivery
    - Integration of cross cutting themes (includes Welsh language)
    - Additionality (what would have happened without the funding)
    - Issues in project delivery
    - Community involvement achieved
    - Publicity undertaken
    - Impacts – what effect has the project had so far
    - What happens next (project sustainability)
    - Any other unexpected outcomes (positive or negative) e.g. contacts made, networks joined, issues uncovered
    - Any other comments
  - Other Stakeholders
    - Perceptions on project development against themes
    - Difficulties with engagement with TRC
    - Experience of working/engagement with REACH/engagement with the LAG
    - Experience of partnerships developed in project development and delivery
    - Perceptions of project delivery against LDS objectives; gaps and ongoing priorities
    - Views on integration of cross cutting themes (includes Welsh language)
    - Views on additionality (what would have happened without the funding)
    - Views on extent of community involvement achieved

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[2] *There will be a need to keep within acceptable online survey length and what can reasonably be achieved in interviews so it is possible some areas of questions may need to be adapted/combined or possibly left out of some evaluation activities to achieve this. Inevitably there is some element of compromise needed.*

- ‣ Wider Impacts being achieved
- ‣ The wider knowledge of the Thriving Rural Communities programme (communication tools and messages)
- ‣ Other unexpected /changed policy or programmes impacting on TRC
- ‣ Any other comments
- o General interest in TRC activities - participant in a project, Community Council
  - ‣ Knowledge of the Thriving Rural Communities programme (communication tools and messages)
  - ‣ Views on LDS key objectives as important/relevant
  - ‣ Experience of working/engagement with REACH/engagement with the LAG
  - ‣ Experience of engagement with project development and delivery
  - ‣ Views on extent of community involvement achieved in TRC
  - ‣ Perceptions of project activities to date; gaps and ongoing priorities
  - ‣ Perception of wider impacts being achieved
  - ‣ Any other comments
- o Kenfig Project – specific survey?

We understand that Reach has recently sent out an evaluation form to project contacts and some returns have been made (see Appendix 1). No end date for their completion was given. The form covers a number of the questions we would have asked project contacts in an online survey but not all of them. Additionally it has not included all projects supported through the Preparatory Support Scheme nor the earlier 'main scheme' projects (although these were nearly all led by Reach – the schemes in green in the table below):

Projects sent evaluation forms	Projects not covered
Active Outdoor Play Welsh Ambassadors – BTA (2 returned) Welsh Place Names book – Menter Bro Ogwr Craft Development Tondu Wesley Centre Retail at Country Parks/Awen Nantymoel Boys & Girls Club	Garw Sports based community hub Physical activity in childcare provision Garw Valley Railway Heritage Centre Kenfig (our case study) CAT Toolkit and Report (Bridgend CBC project) Resilient Economy – Local supply chains (reach) Green infrastructure and healthy lifestyles (reach) Supply chain development for the local economy (reach) Competitive facilities for a growing economy (reach) Building capacity for community led services in the 21st century (reach)

We need to decide how to deal with the project survey in the light of the evaluation forms already circulated.

Focus Groups:

- **LAG** :
  - ▸ Effectiveness of delivery of five RDPW themes and contribution to LDS strategic and delivery objectives – most and least effective, balance, contributory factors; should anything change/ do more or less of;
  - ▸ Effectiveness of the delivery model – commissioning; opportunities and challenges, potential for development within current LEADER guidelines from WG; effectiveness of communications about the programme
  - ▸ Effectiveness of support resources (REACH staff, project developers and associated partnerships, the LEADER funding, match funding/in-kind support by partners)
  - ▸ Administration and management side; perceptions on this being fit for purpose; issues/challenges and opportunities; quality and sufficiency
  - ▸ Strength of networking and collaboration; at project level; in terms of linking with other programmes and funding streams; at the LAG level and working with other networks
  - ▸ Ongoing relevance of the LDS - is it still a good representation of what is needed in Rural Bridgend; gaps in the LDS and ongoing priorities; key policy changes/ opportunities/challenges that it needs to respond to
  - ▸ Delivering the LEADER approach – bottom up, community engagement, innovative, integrated and multi-sectoral – is this being achieved; changes needed to improve on these delivery principles further
  - ▸ Impacts – impact being achieved, ability to deliver a difference when viewing all activities collectively; sustainability and longevity to activities supported

- **Rural Thematic Network representatives**
  - ▸ Key rural issues at the time of writing the LDS and their ongoing importance/relevance (reviewing the SWOT; need to pull some of the key elements out of the LDS SWOT)
  - ▸ Knowledge and communication about TRC – awareness of what is available, how to access this, what is happening, what is being produced
  - ▸ Activities of TRC and project delivery in relation to these issues; are projects making a useful contribution to LDS objectives, are there gaps, are there other factors affecting what comes forward
  - ▸ Ongoing relevance of the LDS - is it still a good representation of what is needed in Rural Bridgend; gaps in the LDS and ongoing priorities; key policy changes/ opportunities/challenges that it needs to respond to
  - ▸ Delivering the LEADER approach – bottom up, community engagement, innovative, integrated and multi-sectoral – is this being achieved; changes needed to improve on these delivery principles further
  - ▸ Any views on the delivery model (commissioning) and administration and management of TRC; working with Reach staff and the LAG

- **Kenfig Project volunteers and stakeholders (to be further developed)**
  - ▸ Partnerships and working with others; value of the project, how this supports local community and area, what volunteers are getting out of it; has the local community got involved

- How this might the project develop in the longer term; has this work started something that will keep going? How important was the TRC funding in getting something going in the first place and would it have happened anyway

- Importance of the project itself and its activities – contribution to LDS objectives; and the objectives of others e.g. NRW; outputs being achieved (that TRC wants to buy)

- Integrating the cross cutting themes (equality and diversity, environmental sustainability, welsh language); examples of successes and challenges

- Publicity and communication; how well has this gone; issues and opportunities; extending knowledge and users at Kenfig sand dunes

Interviews:

- **Reach officers** ;
  - Which projects worked well and what were the contributory factors to this; what did not work as well and why; what would have done differently, more or less of; what has been innovative and transferable;
  - Are the resource inputs (finance, people, systems) effective and sufficient; as Reach staff is there a need for any other support/resources; does the paperwork side work effectively/smoothly from your perspective and that of the users
  - Ease of integrating cross cutting themes; good examples of where this has been achieved, issues encountered
  - Effectiveness of delivery of five RDPW themes and contribution to LDS strategic and delivery objectives – most and least effective, balance, contributory factors; should anything change/ do more or less of;
  - Effectiveness of the delivery model – commissioning; opportunities and challenges, potential for development; current LEADER guidelines from WG;
  - Value of LAG; knowledge and understanding of LDS aims and themes; biggest challenges; accessibility and decision-making, facilitation skills required; making decisions; promoting the LEADER approach
  - Engaging people in project activity – opportunities and challenges; hard to reach groups; knowledge of TRC and communicating effectively; difficulties with engagement
  - Ongoing relevance of the LDS - is it still a good representation of what is needed in Rural Bridgend; gaps in the LDS and ongoing priorities; key policy changes/ opportunities/challenges that it needs to respond to
  - Delivering the LEADER approach – bottom up, community engagement, innovative, integrated and multi-sectoral – is this being achieved; changes needed to improve on these delivery principles further

- **Stakeholders**

  - Effectiveness of delivery of five RDPW themes and contribution to LDS strategic and delivery objectives – most and least effective, balance, contributory factors; should anything change/ do more or less of;
  - Effectiveness of the delivery model – commissioning and piloting; opportunities and challenges, integration of cross cutting themes including Welsh language potential

- Effectiveness of communications about the programme; are the right groups getting involved, do communities know about this opportunity
- Effectiveness of support resources (Reach staff, project developers and associated partnerships, the LEADER funding),
- Administration and management side; perceptions on this being fit for purpose; issues/challenges and opportunities; quality and sufficiency
- Strength of networking and collaboration; at project level; in terms of linking with other programmes and funding streams - at the LAG level and working with other networks
- Ongoing relevance of the LDS - is it still a good representation of what is needed in Rural Bridgend; gaps in the LDS and ongoing priorities; key policy changes/ opportunities/challenges that it needs to respond to
- Delivering the LEADER approach – bottom up, community engagement, innovative, integrated and multi-sectoral – is this being achieved; changes needed to improve on these delivery principles further

- **Project leads**; 6 projects (not including Kenfig)
  - Prompt for the project; ease of fit with LDS; getting local partnerships together to develop the project, views of the commissioning approach; dealing with the cross cutting themes
  - Experience of dealing with the application processes; support from REACH staff, engagement with the LAG,
  - Outputs being achieved, in line with expectations
  - Impacts, what went well and not so well, unexpected activities or impacts, additionality; what were the factors that enabled the project to achieve what it did, and what were the barriers/hurdles that prevented it or impacted on its potential to achieve, links to other projects. Lessons learnt.
  - Plans/aspirations for further developing activity – where does the project go next and does it have some sustainability/longevity

- **Kenfig (to be further developed)**
  - Prompt for the project; ease of fit with LDS; getting local partnerships together to develop the project, views of the commissioning approach; dealing with the cross cutting themes
  - Experience of dealing with the application processes; support from Reach staff, engagement with the LAG,
  - Outputs being achieved/exceeded; reasons for this, experience learned
  - Impacts, what went well and not so well, unexpected activities or impacts, additionality; what were the factors that enabled the project to achieve what it did; any barriers/hurdles that prevented it or impacted on its potential to achieve. Lessons learnt and to pass on.
  - Extent of community participation and use; communicating the opportunity (of the project and what it has created); creating information and promoting it on an ongoing basis – how will this be done and who can commit to this
  - Plans/aspirations for further developing activity – where does the project go next and does it have some sustainability/longevity

Reach Project Evaluation Form Circulated

<table>
<tr><td colspan="4">Your Name:

(leave name blank if you would prefer)</td></tr>
<tr><td colspan="4">How are you involved in the project? (please tick ✓)</td></tr>
<tr><td>Part of the project's Steering Group</td><td></td><td>Project proposer</td><td></td></tr>
<tr><td>Appointed to deliver/manage the project</td><td></td><td>Project beneficiary/taking part in activities</td><td></td></tr>
<tr><td colspan="4">Other, please state:</td></tr>
</table>

<table>
<tr><td>Project Aim:

(copy and paste from the project tender brief)</td></tr>
<tr><td>.</td></tr>
<tr><td>Did the project achieve its aim? Please detail below:</td></tr>
<tr><td></td></tr>
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<table>
<tr><th>Outputs / Deliverables

(copy and paste from project tender brief)</th><th>On Track / Achieved / Not Achieved / Don't Know</th></tr>
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<tr><td colspan="2">Notes / Comments / Issues identified include any unexpected or wider impacts identified</td></tr>
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Cross-Cutting Themes How well do you think the project has delivered against the following:	Comments, please give examples if you can
Equal Opportunities and Gender Mainstreaming	
Tackling Poverty and Social Exclusion	
Sustainable Development	
The Welsh Language	
Supporting the Uplands *(Leave blank if not applicable)*	

Please provide any feedback you would like to share on your experience with the Thriving Rural Communities Scheme, for example, the application process, how information is communicated, activities, support received or lessons learned.

How would you rate your experience with the Thriving Rural Communities Scheme *(please tick ✓)*

Bad		Poor		Okay		Good		Excellent	

How did you find out about the Thriving Rural Communities Scheme?

Would you recommend the Thriving Rural Communities Scheme?   Yes/ No

Annex Two: Method Statement

The evaluation methodology for the LDS evaluation went through the following process:

- **Inception meeting**; held on Monday June 26th at Reach offices, with Reach officer and Welsh Government RDP representation, together with consultants.

- **Preparation of the Evaluation Framework**. Put together immediately after the inception meeting this set up the logic chain for the evaluation and scoped the tools for evaluation and the areas of questions to be covered, all to respond to the evaluation questions in the brief. The evaluation framework was provided to Reach for comment

- **Desk based research** was undertaken in three ways:

  - A socio economic review of data, updating and adding to that used in the LDS to identify any changes in circumstances in rural Bridgend in relation to key indicators relevant to the LDS. This used secondary published data

  - A review of recently published of Wales and City Region policy documents to assess their potential relevance to the LDS moving forward

  - A review of LEADER and LDS documents which has included:

    - Welsh Government guidance on LEADER, including updates
    - The LDS and its intervention logic diagram
    - TRC forms for the application and appraisal process for projects
    - Documentation held for six projects supported with LEADER funding, of which one predated the introduction of the TRC scheme
    - Review of all project application forms
    - Review of research reports produced as a result of Reach research projects prior to introduction of TRC
    - Review of TRC financial and output monitoring spreadsheets held by Reach

- **Primary consultations** undertaken with stakeholders and project participants, which covered:

  - Nine interviews with stakeholders and 14 interviews with project participants (drawn from the six projects reviewed),   undertaken on a semi structured basis and by telephone (a list of organisations contacted is given at the end of this appendix). We were unable to organise interviews with one stakeholder and one project participant who did not respond within the timescale

  - Attendance at the LAG meeting held in July 2017 and facilitation of a focus group with LAG members immediately after the LAG meeting

  - A focus group with Rural Thematic Group members. Reach undertook to contact a number of RTG members they considered likely to engage with a focus group. The intention was to facilitate a discussion with around 8-10 representatives from the different thematic groups. However the response was very disappointing and only two people attended on the day although four people had booked. Nevertheless it was a useful discussion, particularly as one of the attendees came from the business community which is quite absent from TRC activity to date

  - An online survey with stakeholders. This used surveymonkey. We developed the online survey (available in Welsh and English) and the link was circulated by Reach, together
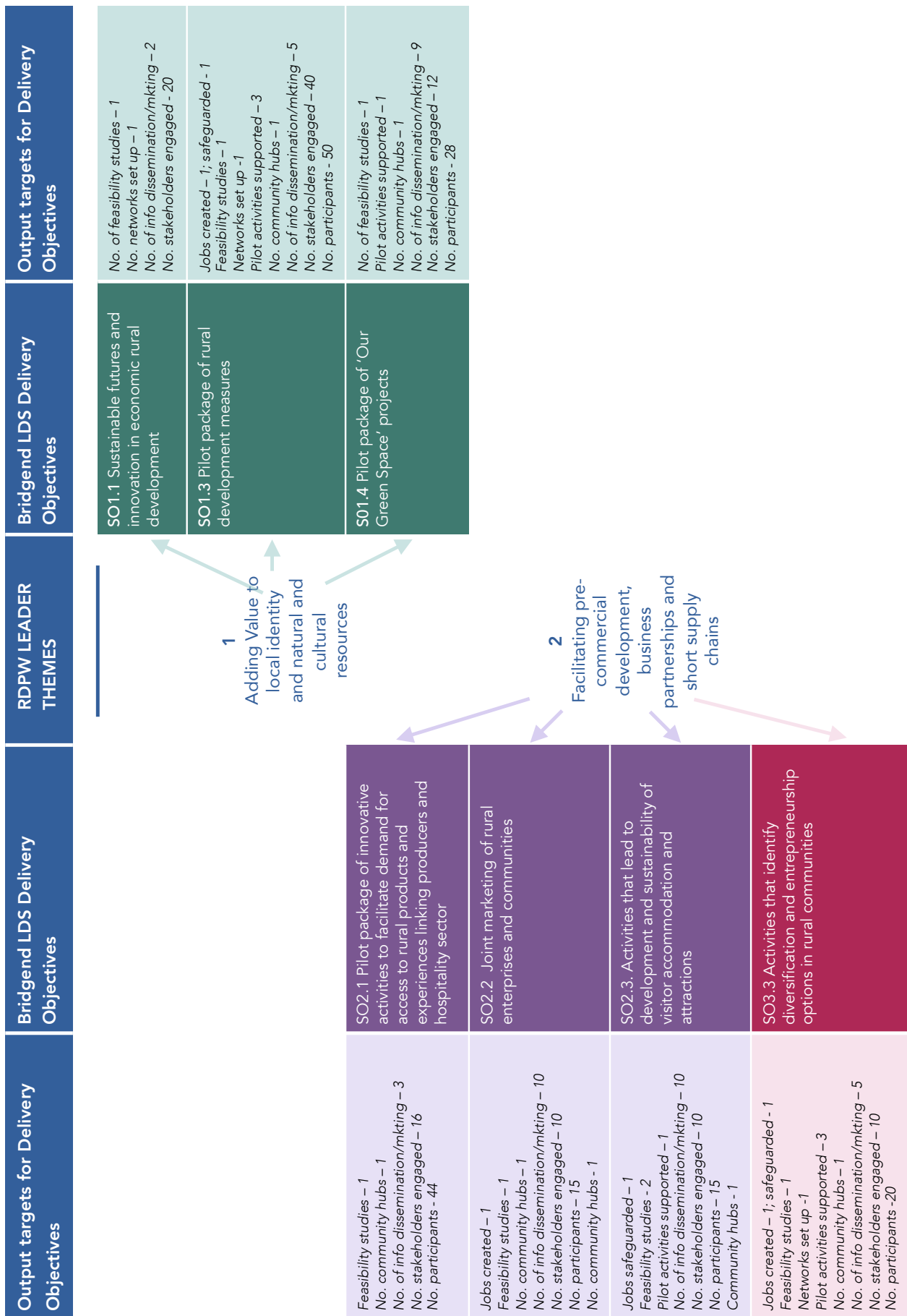
with a covering email. This went to around 220 contacts on Reach's list, principally Rural Thematic Group members. However only 18 responses were received despite a follow up email to seek responses. We are disappointed by this level of response, although the information obtained and the comments from those who did respond have been very useful
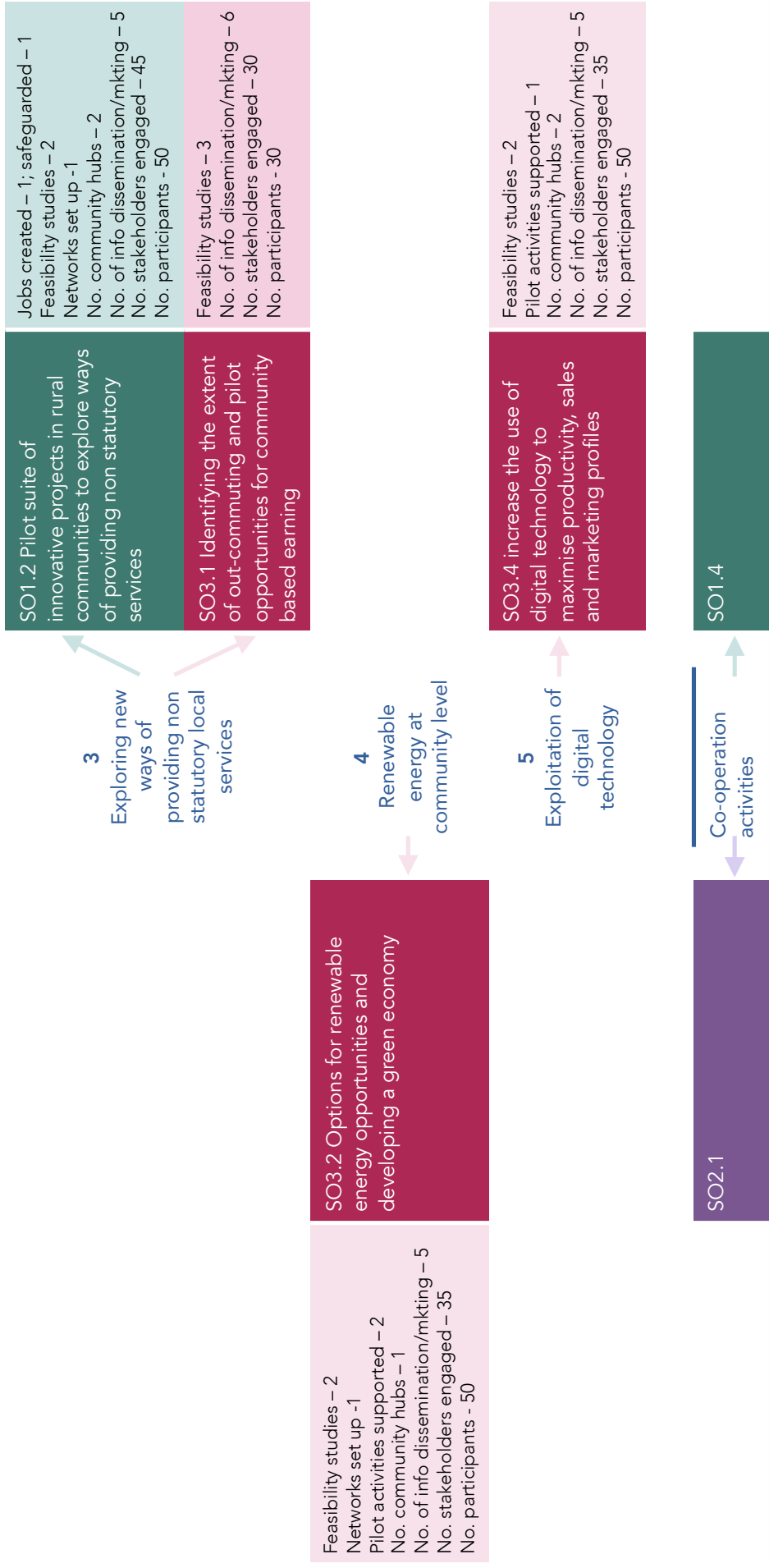
‣ An online survey with project participants. Again this used surveymonkey and was available in Welsh and English. Our proposal set out that this would be a part of our method for the evaluation. On appointment however, we found that Reach had already sent evaluation forms to a number (but not all) of project participants and some responses had been received to that. It would therefore have been counterproductive to circulate a different survey. However there were questions that we had wanted to include which were not part of Reach's survey and only a few responses had been received. We therefore compromised by using Reach's evaluation questions and adding some further questions and also slightly re-shaping the existing ones to be more probing and objective. The survey link for this was again circulated on our behalf by Reach staff to their project contacts, effectively as a reminder to those contacted to complete the survey and also extended to other projects not previously covered. However we only received one response. In order to balance this poor response we did increase the number of project participant surveys we undertook whilst also making use of the 10 evaluation responses Reach had already received to their form.

- **Analysis** of the research was undertaken in line with the evaluation framework. A report template was agreed with Reach (which also aligned with Welsh Government's RDP evaluation template which they had requested) with different sections addressing certain of the evaluation questions required in the brief

- **A draft report** was submitted to Reach by August 14th as agreed with the client.

Stakeholders and Project Participant organisations consulted through interviews

Bridgend Tourism Association	Chair of the LAG
BCBC (Destination Management)	Bridgend Employer Liaison Partnership
Cwmni2	Bridgend Association of Voluntary Organisations
National Farmers Union	2 x private sector LAG members
Cotelydon	Reach staff members
Valleys to Coast	BCBC (Economy and Natural Resources
John Gates – local crafting community	BCBC (Community Asset Transfer)
RTP Consulting	Sustainable Wales
Councillor Martyn Jones – local community	BCBC (Low carbon initiative)
Wales Co-operative Centre	

Annex Three: Linking RDPW themes with LDS objectives

RDPW LEADER THEME 1: Adding Value to local identity and natural and cultural resources

Bridgend LDS Delivery Objectives	Output targets for Delivery Objectives
SO1.1 Sustainable futures and innovation in economic rural development	No. of feasibility studies – 1 No. networks set up – 1 No. of info dissemination/mkting – 2 No. stakeholders engaged - 20
SO1.3 Pilot package of rural development measures	Jobs created – 1; safeguarded - 1 Feasibility studies – 1 Networks set up -1 Pilot activities supported – 3 No. community hubs – 1 No. of info dissemination/mkting – 5 No. stakeholders engaged – 40 No. participants - 50
S01.4 Pilot package of 'Our Green Space' projects	No. of feasibility studies – 1 Pilot activities supported – 1 No. community hubs – 1 No. of info dissemination/mkting – 9 No. stakeholders engaged – 12 No. participants - 28

RDPW LEADER THEME 2: Facilitating pre-commercial development, business partnerships and short supply chains

Bridgend LDS Delivery Objectives	Output targets for Delivery Objectives
SO2.1 Pilot package of innovative activities to facilitate demand for access to rural products and experiences linking producers and hospitality sector	Feasibility studies – 1 No. community hubs – 1 No. of info dissemination/mkting – 3 No. stakeholders engaged – 16 No. participants - 44
SO2.2 Joint marketing of rural enterprises and communities	Jobs created – 1 Feasibility studies – 1 No. community hubs – 1 No. of info dissemination/mkting – 10 No. stakeholders engaged – 10 No. participants – 15 No. community hubs - 1
SO2.3. Activities that lead to development and sustainability of visitor accommodation and attractions	Jobs safeguarded – 1 Feasibility studies - 2 Pilot activities supported – 1 No. of info dissemination/mkting – 10 No. stakeholders engaged – 10 No. participants – 15 Community hubs - 1
SO3.3 Activities that identify diversification and entrepreneurship options in rural communities	Jobs created – 1; safeguarded - 1 Feasibility studies – 1 Networks set up -1 Pilot activities supported – 3 No. community hubs – 1 No. of info dissemination/mkting – 5 No. stakeholders engaged – 10 No. participants -20

Jobs created – 1; safeguarded – 1
Feasibility studies – 2
Networks set up -1
No. community hubs – 2
No. of info dissemination/mkting – 5
No. stakeholders engaged – 45
No. participants - 50

Feasibility studies – 3
No. of info dissemination/mkting – 6
No. stakeholders engaged – 30
No. participants - 30

Feasibility studies – 2
Pilot activities supported – 1
No. community hubs – 2
No. of info dissemination/mkting – 5
No. stakeholders engaged – 35
No. participants - 50

SO1.2 Pilot suite of innovative projects in rural communities to explore ways of providing non statutory services

SO3.1 Identifying the extent of out-commuting and pilot opportunities for community based earning

SO3.4 increase the use of digital technology to maximise productivity, sales and marketing profiles

SO1.4

3
Exploring new ways of providing non statutory local services

4
Renewable energy at community level

5
Exploitation of digital technology

Co-operation activities

SO2.1

SO3.2 Options for renewable energy opportunities and developing a green economy

Feasibility studies – 2
Networks set up -1
Pilot activities supported – 2
No. community hubs – 1
No. of info dissemination/mkting – 5
No. stakeholders engaged – 35
No. participants - 50

KEY

LDS Strategic Objective 1

LDS Strategic Objective 2

LDS Strategic Objective 3

Annex Four: Table of projects

Project Title	Brief Description	RDP Theme Fit	LDS Delivery Objective Fit	LEADER Funding £	Levered funding £
Kenfig Natura 2000 project	Pilot project to develop strategic and sensitive site management and raise knowledge and awareness of the ecosystem in order to manage the impact of visitors on the ecosystem and allow more visits to the area	1	SO1.4	46,725	46,725
Welsh Tourism Ambassadors	Recruiting and training welsh speaking tourism ambassadors; and using them at the Urdd Eistedfodd May 2017	1	SO2.3	5000	769
Welsh Place Names Research	Workshops and research on Welsh Place Names in rural Bridgend with pocket book produced in time for Urdd Eistedfodd	1	SO 1.3	5000	1650
Bryngarw Country Park Customer and Retail Study	Research to map the commercial and retail opportunities at the Country Park, supporting other uses/users there and engaging local producers	2	SO1.2	4,800	1,200
Development Plan for Rural Crafts	Study to look at the potential for a viable local craft economy in rural Bridgend (and beyond)	2	SO1.2	5,800	674
Supply chain development for the local food economy	Looking at opportunities to increase the uptake and profile of local food in Bridgend.	2	SO2.1	Reach Officer time	
Competitive facilities for a growing visitor economy	Particularly looked at cycling and came up with proposals including bike loan scheme and small scale infrastructure improvements	2	SO2.3	Reach Officer time	
Tondu Wesley Chapel	Feasibility of developing access and parking arrangements to increase use of this community centre	3	SO1.1	2,500	350
Garw Sustainable Sports based community hub(s)	feasibility of an innovative sustainable sports based community hub to meet local sports and community needs – and potentially including complementary income generating uses	3	SO1.2	7,000	1,643
Outdoor physical activity in childcare project	Research and consultation into how childcare providers can increase the potential for outdoor physical activity using green spaces	3	SO1.2	5,400	0

Project Title	Brief Description	RDP Theme Fit	LDS Delivery Objective Fit	LEADER Funding £	Levered funding £
Nantymoel Boys and Girls Club Building drawings	Architectural drawings for refurbishment of building in order to be able to secure capital funding for the refurbishment works subsequently, from money allocated by BCBC	3	SO1.2	4999 approved	894
Community Asset Transfer Toolkit	Development of a toolkit to enable community groups to understand and plan for community asset transfer from BCBC	3	S01.2		16000*
Community Asset Transfer Business support programme	Support to community groups involved in community asset transfer, in order to ensure the transferred asset is viable and sustainable; supporting a small number of groups in rural Bridgend in this process	3	SO1.2		48,000*
Renewable Opportunities study	Assessment of community renewable energy opportunities	4	SO3.2	7,500	0
Green infrastructure and Healthy lifestyles report	Study proposed an ambitious six-year forward work plan highlighting two key opportunities to deliver strategic, integrated and complementary work programmes, one being a project at Kenfig NNR	4	SO3.2	Reach Officer time	
Building capacity for community led services in the 21st century	Developing options to support rural communities to gain the knowledge, skills and confidence to implement renewable energy solutions	4	SO3.2	Reach Officer time	
Resilient Economy Local Supply chains	Co-operation project involving 8 LAGs; working together to maximise the potential of the local supply chain across the region to drive growth. Specifically in the food and drink sector, links with hospitality etc	6	SO2.3	£22,180	All participating LAGs fund their own components

*Bridgend CBC matched funding which has been committed to LEADER in rural Bridgend

Annex Five: Socioeconomic analysis – update on indicators

The LDS was developed relatively recently (2014) and as a consequence it is unlikely that socioeconomic conditions in rural Bridgend will have changed markedly in the subsequent period. Equally, if conditions have changed then this may not yet have been reflected in updated data from those identified in the LDS (acting as a baseline for any subsequent socioeconomic analysis). Much of the data contained in the LDS was based on 2011 Census. As such, no updates are available. However, there have been some data updates which are important to highlight given their relevance to the LDS themes. These are set out below.

Labour Market & Population Statistics

According to the latest data (June 2017), 2% of residents of working age (16-64) within rural Bridgend are currently claiming Jobseeker's Allowance[3]. This broadly matches levels seen in Bridgend as a whole and Wales. 0.6% of the working age population in rural Bridgend have been claiming for JSA for more than 6 months, with 0.4% claiming for more than 12 months. Again, this broadly matches trends seen elsewhere. Government policy changes over the past few years have concentrated on reducing the levels of long-term unemployed.

Bridgend remains a relatively densely populated area of Wales. There are 571 persons per square kilometre compared to an average 150 across Wales[4]. Population growth has been relatively strong in recent years; between 2011 and 2016 it is estimated that population has grown by 2.7% compared to 1.6% across Wales. The data also shows that the biggest component of the population growth in Bridgend has been net internal migration, with natural change only a minor factor.

Industrial breakdown

As Chart 1 shows, there are some differences in the make-up of the business community in rural Bridgend compared to the local authority area as a whole. There is a slightly higher proportion of people employed in manufacturing businesses within rural areas (approximately 17%), although as elsewhere the numbers will have fallen over the longer-term. There are as well as those involved in the educational sector and accommodation and food – the latter reflecting the role of tourism in rural Bridgend[5].

Conversely, there are lower proportions of retail businesses, as well as in sectors that tend to have a greater urban focus such as public administration and health.

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[3] *Claimant Count, ONS*

[4] *StatsWales*

[5] *This data is taken from ONSs' Business Register & Employment Survey which does not comprehensively cover agricultural businesses which are therefore excluded from this analysis*

Chart 1: Proportion of numbers employed in industrial sectors
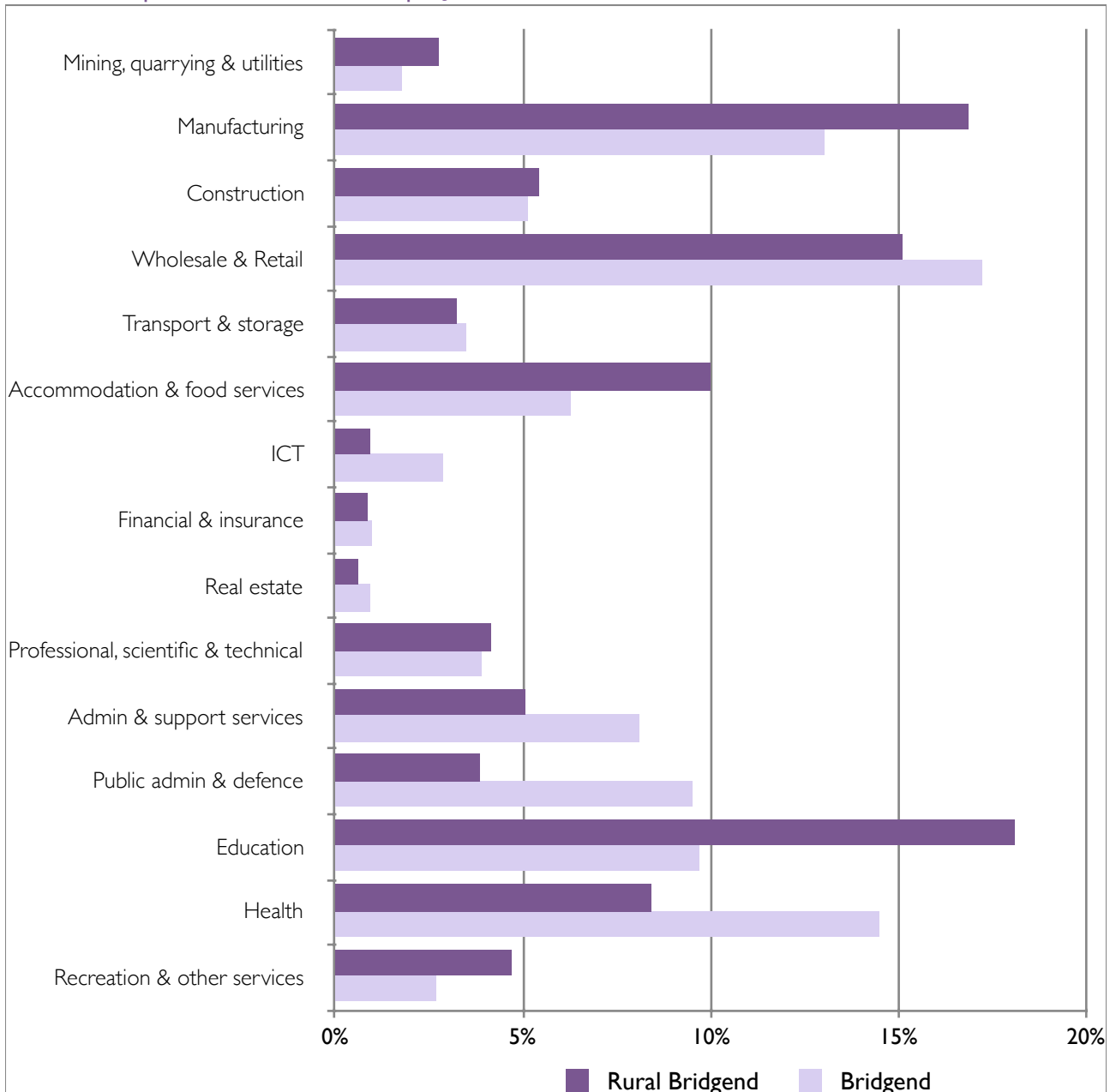
Source: BRES, ONS

Energy & Flooding

The latest data shows that there 1,754 low carbon energy projects[6] in Bridgend with an associated electrical capacity of 62 MW and 1.8 MW of heat capacity[7]. The number of installed projects has been growing over recent years, although this is largely dominated by the number of domestic photovoltaic installations i.e. solar panels on people's roofs.

2,600 properties in Bridgend are assessed at being of 'medium' or 'high' risk of flooding, with a further 2,300 assessed as having a 'low' risk. 52% of those properties assessed as having a risk of flood are classified as either 'medium' or 'high', compared to 29% in Wales as a whole. This could highlight the potential severity of a flood event within the area.

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[6] These are individual household projects

[7] StatsWales

Welsh Index of Multiple Deprivation (WIMD)

As highlighted in the LDS, many parts of the rural county suffer continued problems with deprivation, which comes in many forms and WIMD data illustrates which forms of deprivation are most prevalent across each area.

The WIMD is Welsh Government's official measure of relative deprivation for small areas in Wales. It is designed to identify those small areas where there are the highest concentrations of several different types of deprivation. As such, WIMD is a measure of multiple deprivation that is both an area-based measure and a measure of *relative* deprivation. WIMD is currently made up of eight separate domains (or types) of deprivation. Each domain is compiled from a range of different indicators.

WIMD is calculated for all Lower layer Super Output Areas (LSOAs) in Wales. Following the 2011 Census, 1,909 LSOAs were defined in Wales and they each have an average population of 1,600 people. There are 40 LSOAs in Rural Bridgend (out of a total of 87 in Bridgend County Borough as a whole), within the 21 wards within the programme area. The Index provides a way of identifying areas in the order of most to least deprived. It does not provide a measure of the level of deprivation in an area, but rather whether an area is more or less deprived relative to all other areas in Wales. The WIMD cannot be used to compare deprivation for one area with its deprivation in a previous edition of the Index.

The latest comprehensive update to the WIMD was in 2014, with the next update planned for 2019. This update will be important to understand how Rural Bridgend may have performed, in relative terms, on the measurements of deprivation[8]. However, a selection of indicators is updated annually. In this section, the results of the relative performance of Rural Bridgend for both the WIMD 2014 and the annually updated indicators are presented.

WIMD 2014

In terms of the overall (WIMD) index of deprivation[9], Rural Bridgend has 4 LSOAs[10] in the 10% most deprived areas of Wales. These LSOAs are located within the Mid Bridgend and Lower Bridgend Community First Poverty Clusters. Bridgend Borough County has 9 LSOAs in total within the 10% most deprived. This is broadly commensurate to the share of LSOAs within Bridgend that are within Rural Bridgend i.e. on a pro rata basis, and therefore the broad conclusion is that Rural Bridgend is not more, or less, deprived than elsewhere in Bridgend (based on a consideration of the combined domains).

However, it does perform relatively poorly in the measurements of health[11] (with 5 LSOAs considered in the 10% most deprived in Wales), and education[12] (with 6 LSOAs within the 10% most deprived). For both of these domains, Rural Bridgend has a proportionally greater share of deprived LSOAs in Bridgend Borough County as a whole. Conversely, Rural Bridgend performs

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[8] Although it is important to recognise that a ranking system should not necessarily be used to monitor change over time. This is due to it not being known whether a change in rank for an area is due to changes in that area itself, or to other areas moving up or down the ranks, changing its position without actual change in the area.

[9] The WIMD is constructed from a weighted sum of the deprivation score for each of the 8 domains. The weights reflect the importance of the domain as an aspect of deprivation, and the quality of the indicators available for that domain. Together, the 'income' and 'employment' domains represent 47% of the overall weighting.

[10] Bettws, Blackmill 2, Cornelly 4, Sarn 1

[11] This considers indicators such as standardised death rates, cancer incidence, long-term limiting illness etc.

[12] This considers indicators such as performance in Key Stage 2 & Key Stage 4, repeat absenteeism, proportion of 18-19 year olds not entering HE etc.

relatively well on the measurements of income, employment, access to services[13,14], community safety and housing. The number of LSOAs within the 10% most deprived areas in Wales for the WIMD and each of the domains are highlighted in Chart 2.

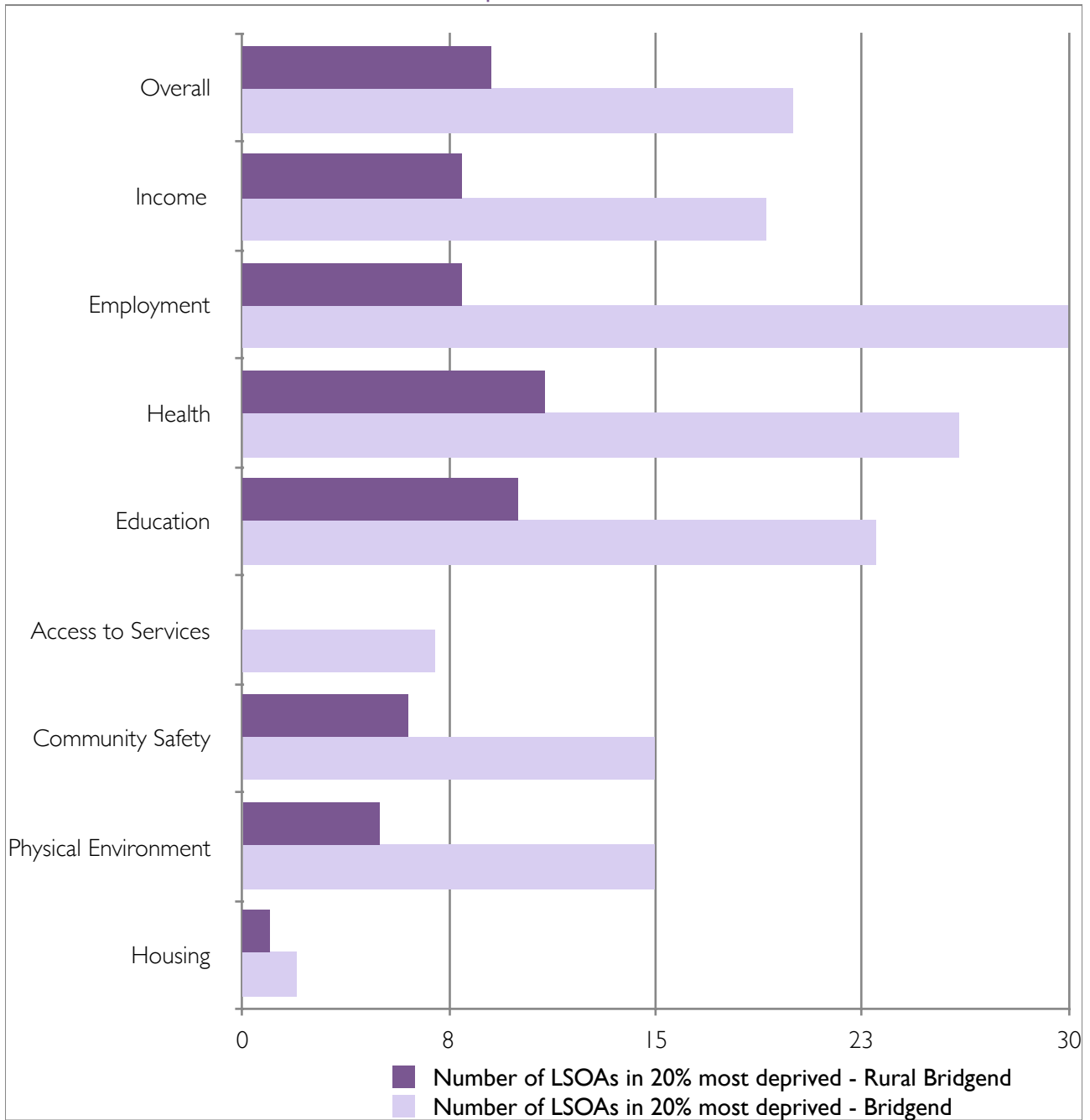Chart 2: Number of LSOAs in 10% most deprived areas in Wales (WIMD 2014)
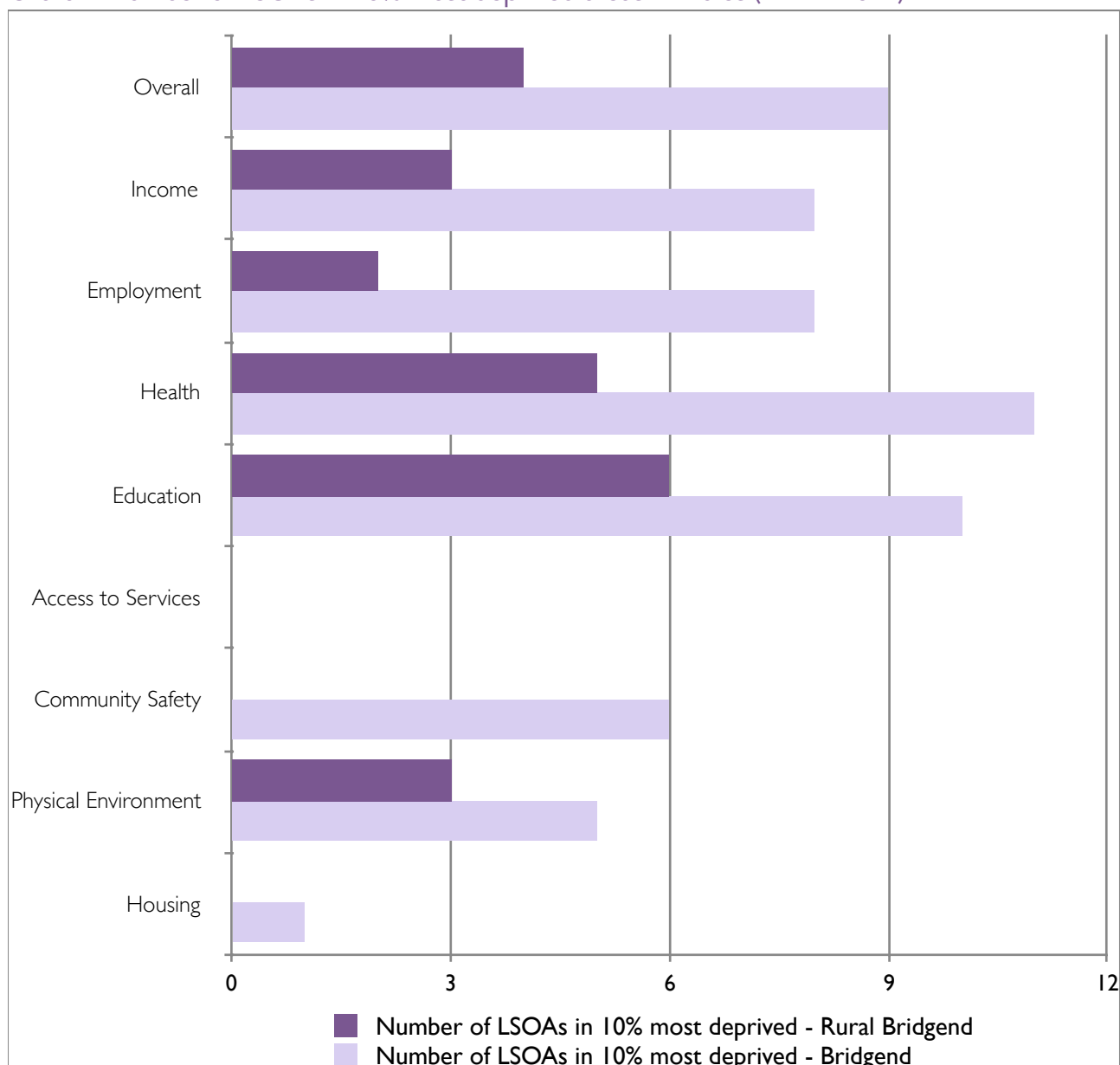
Source: WIMD 2014

In terms of the number of areas within the most 20% deprived areas of Wales, the WIMD 2014 shows that 9 LSOAs were within Rural Bridgend (out of 20 in Bridgend as a whole). Again, Rural Bridgend performed relatively poorly in the measurements of health and education (as shown in the Chart 3). Again, Rural Bridgend performs relatively well in areas such as access to services and housing.

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[13] The purpose of this domain is to capture deprivation as a result of a household's inability to access a range of services considered necessary for day-to-day living such as food shops, GP surgery, schools etc.

[14] Perhaps somewhat surprising given that rural areas tend to perform more poorly on this measure. This may however reflect the fact that some of the areas within Rural Bridged are relatively near settlements. It is important to reiterate that this is a relative measurement so the fact that no LSOAs are within the 10% most deprived areas in Wales reflects that there are a large number of rural areas in Wales which are more remote from service centres

Number of LSOAs in 20% most deprived - Rural Bridgend
Number of LSOAs in 20% most deprived - Bridgend

Source: WIMD 2014

The WIMD 2014 data can be presented in an alternative way to understand Rural Bridgend's relative performance. When presented as the average ranking for the LSOAs within Rural Bridgend, when compared to the LSOAs in Bridgend as a whole, you can understand the domains/types which it relatively more or less deprived. This is shown in the chart below (noting that a rank of '1' is the most deprived, therefore the higher the ranking the less deprived it is on average for that measure).

The chart illustrates in a different way that Rural Bridgend suffers from higher levels of deprivation, compared to Bridgend Borough County as a whole, for health, education, access to services, and physical environment. However, the chart also illustrates that there are only marginal differences (in terms of ranking) between Rural Bridgend and Bridgend as a whole.

Chart 4: Average ranking of LSOAs (WIMD 2014)
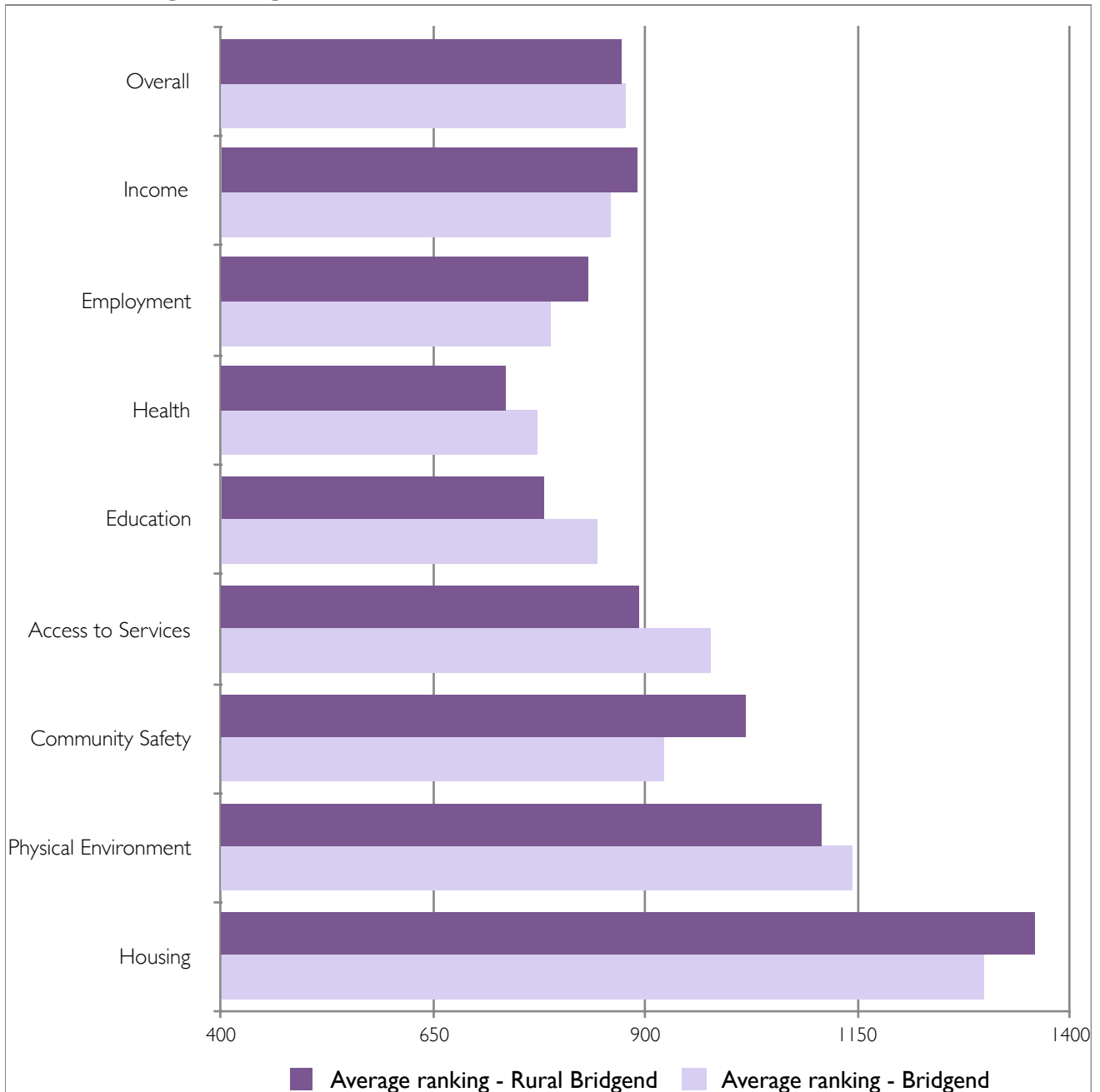
Source: WIMD 2014

WIMD Annual Indicator Update

Some of the underlying data of the WIMD is updated on an annual basis, where possible. The most recent updated data were published in April 2017. It is important to note that the updates are the underlying data and not updated rankings, the focus of the more comprehensive WIMD. However, the data is available at LSOA level and allows us to understand socioeconomic conditions in Rural Bridgend compared to wider comparators i.e. Bridgend County and Wales. Not all data for each of the 8 domains are updated on an annual basis (specifically community safety, physical environment and housing), but for others updated underlying information is available.

It is estimated that 17% of the population in Rural Bridgend suffers from *income deprivation*[15]. This is broadly comparable to the wider areas (as shown in Chart 5). Similarly, 13% of the working-age population was experiencing some form of *employment deprivation*[16]. Again, this was broadly comparable to the wider areas.

Chart 5: Percentage of population experiencing income or employment deprivation

The performance of Rural Bridgend on educational measurements also broadly compare with comparator areas. In chart below shows that pupils in Rural Bridgend gain similar test results (at Key Stage 2 and Key Stage 4) than elsewhere in Wales.

Chart 6: Average Key Stage educational attainment
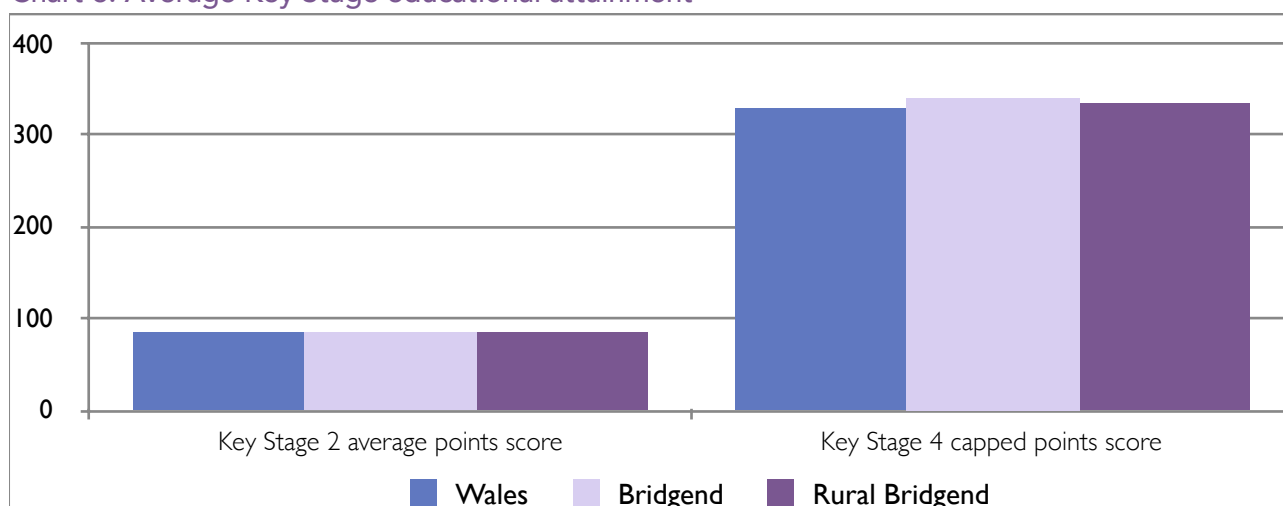
On other educational measures such as repeat absenteeism and the proportion of pupils achieving the equivalent of at least 5 GCSEs at A*-C (Level 2 inclusive), Rural Bridgend again performs broadly average (although Level 2 attainment is slightly lower than in Bridgend as a whole).

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[15] *Defined as percentage of population in receipt of income related benefits or tax credits with an income 60% below the Wales median*

[16] *Defined as percentage of working-age population in receipt of employment-related benefits*

Chart 7: Repeat absenteeism & Level 2 attainment
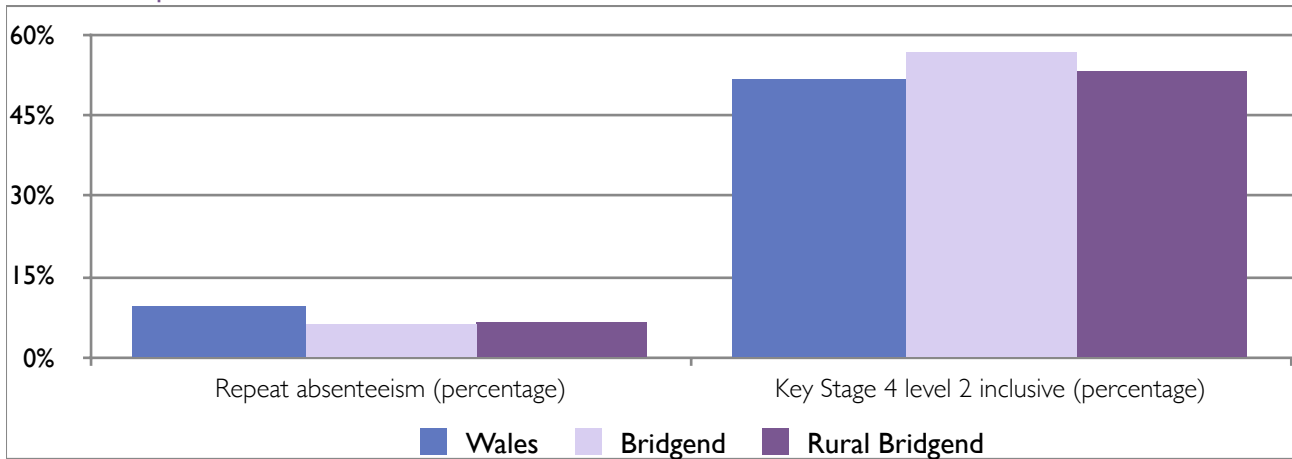
Source: WIMD annual indicators – 2017

The annual WIMD *health* indicators do highlight some differences in Rural Bridgend to elsewhere. It has marginally higher death rate (standardised on an age-sex basis to take into account any demographic differences), incidence of cancer, as well as a marginally higher incidence of low weight births. This is illustrated in the charts below.

Chart 8: Annual WIMD indicators - health
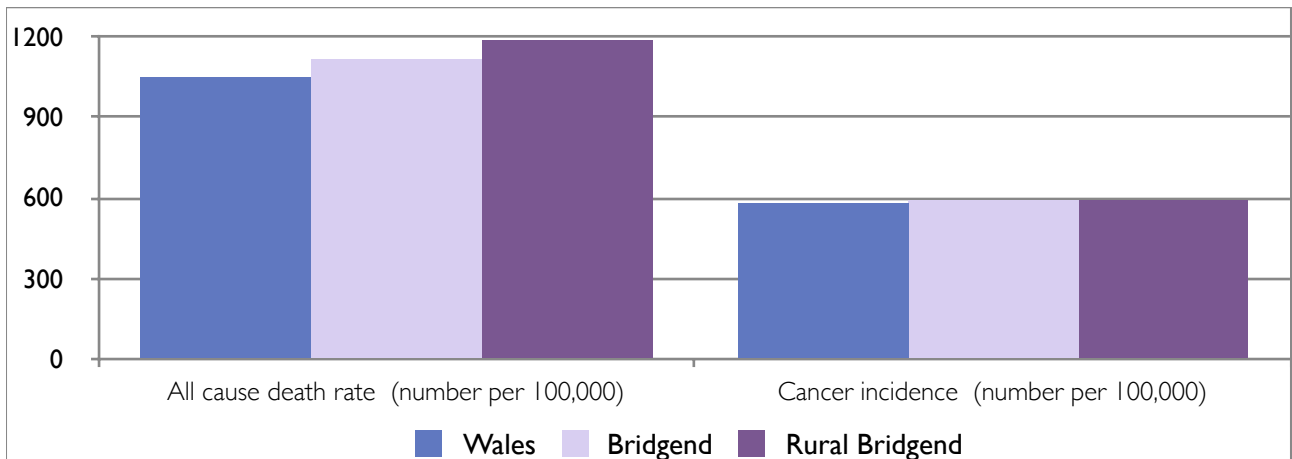
Source: WIMD annual indicators – 2017 (indirectly age-sex standardised)

Chart 9: Incidences of low weight births (less than 2.5kgs)
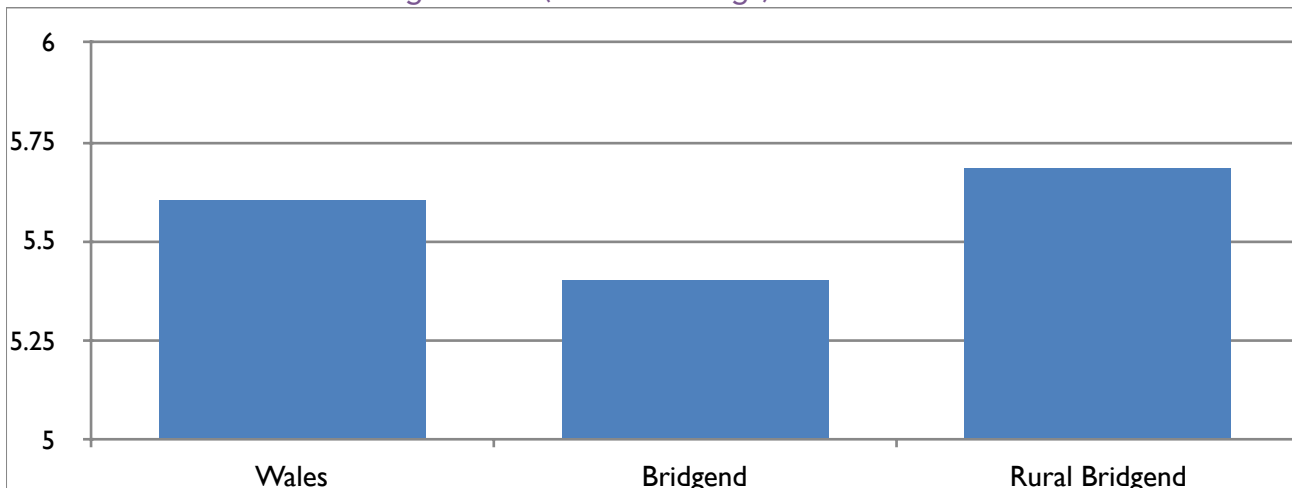
Finally, the annual indicators relating to *crime* shows that generally Rural Bridgend tends to experience lower levels of crime than elsewhere.

Chart 10: Incidences of crime
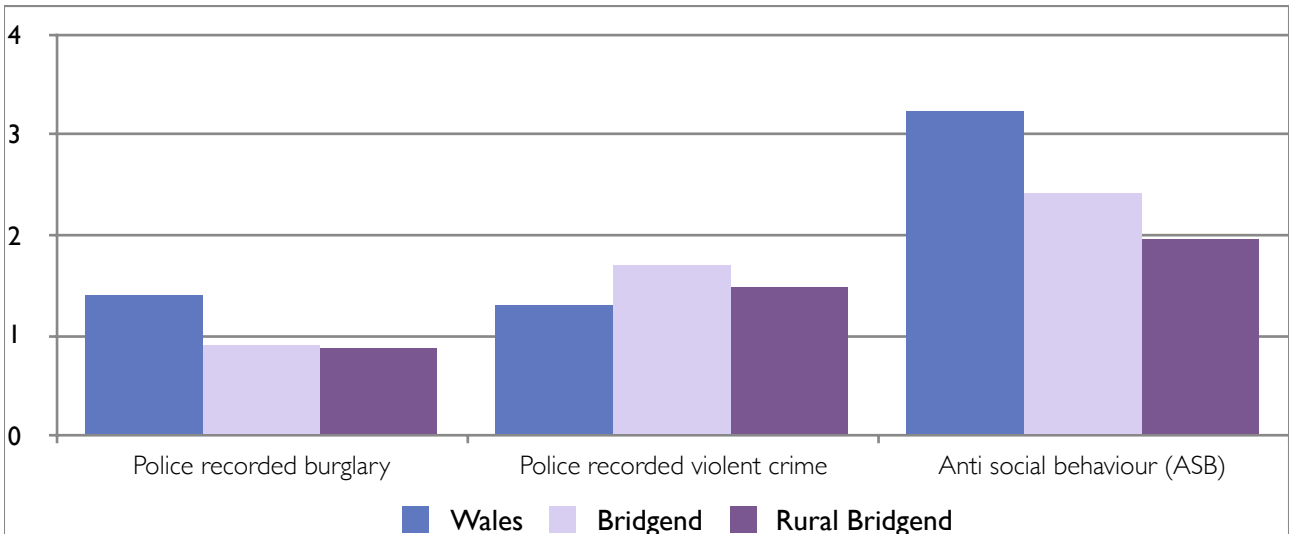
Welsh Speaking Trends

According to data derived from the ONS' Annual Population Survey, the proportion of the population within Bridgend who state that they can speak Welsh continues to grow relatively strongly (as shown in Chart 11). This fits with the Welsh Government's objective of creating a vibrant Welsh language. However, some caution needs to be used when interpreting this data given that it is a survey-based measure and subject to differing degrees of sampling variability.

Chart 11: Proportion of people in Bridgend who say they can speak Welsh

There are some other data sources that show changes in socioeconomic circumstances within Wales. However, many of these do not allow specific analysis of those eligible areas in rural Bridgend. They do, however, allow insight into conditions within Bridgend compared to elsewhere (as we have seen from the above analysis, socioeconomic conditions in rural Bridgend tend not to differ too much from elsewhere in Bridgend) and some of the indicators are relevant to the themes in the LDS.

One example of regularly updated data is from The National Survey for Wales (NSW). This involves surveying over 10,000 people a year across the whole of Wales and the results are used by the Welsh Government in a variety of ways. Some of the results are presented below.

In terms of having a sense of 'belonging' to the local area[17], residents of Bridgend largely felt similar to the views reflected elsewhere in Wales. The majority – just over 70% - of those surveyed felt that they did feel a sense of connection with their local area. 10% felt that they did not have this sense of connection, with the remainder neither agreeing nor disagreeing to the statement (as shown in Chart 12)[18].

Chart 12: Proportion of people who feel they belong to their area
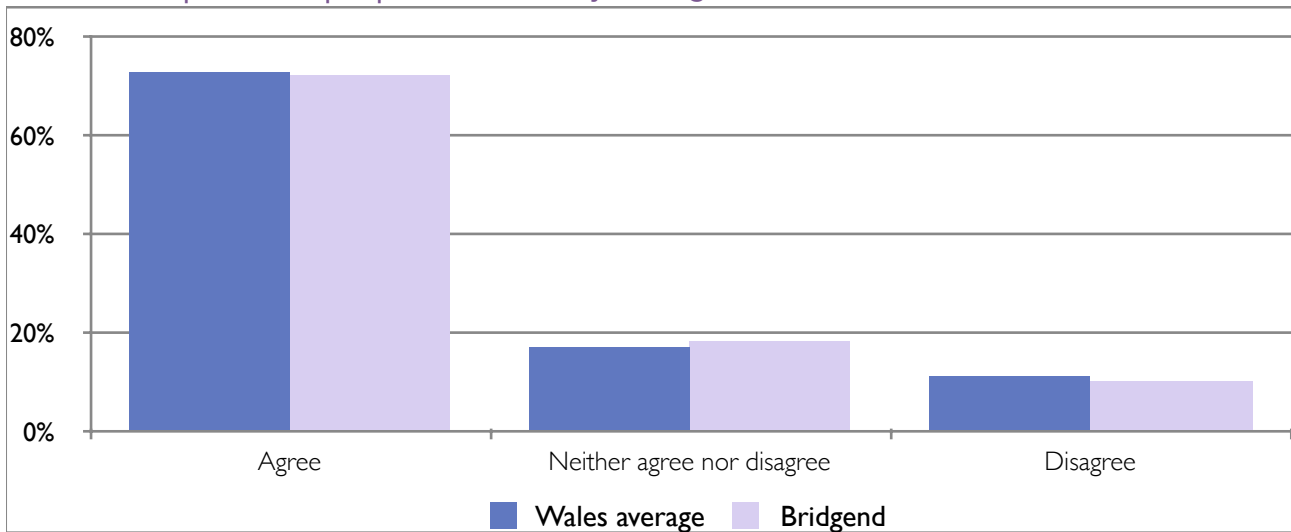
Source: National Survey for Wales

In terms of views on feeling safe in their local area, again residents in Bridgend expressed broadly similar views to elsewhere. Perhaps worryingly, 30% of residents felt that they did not feel safe either at home, walking in the local area, or travelling.

Chart 13: Proportion of people who feel safe in their area
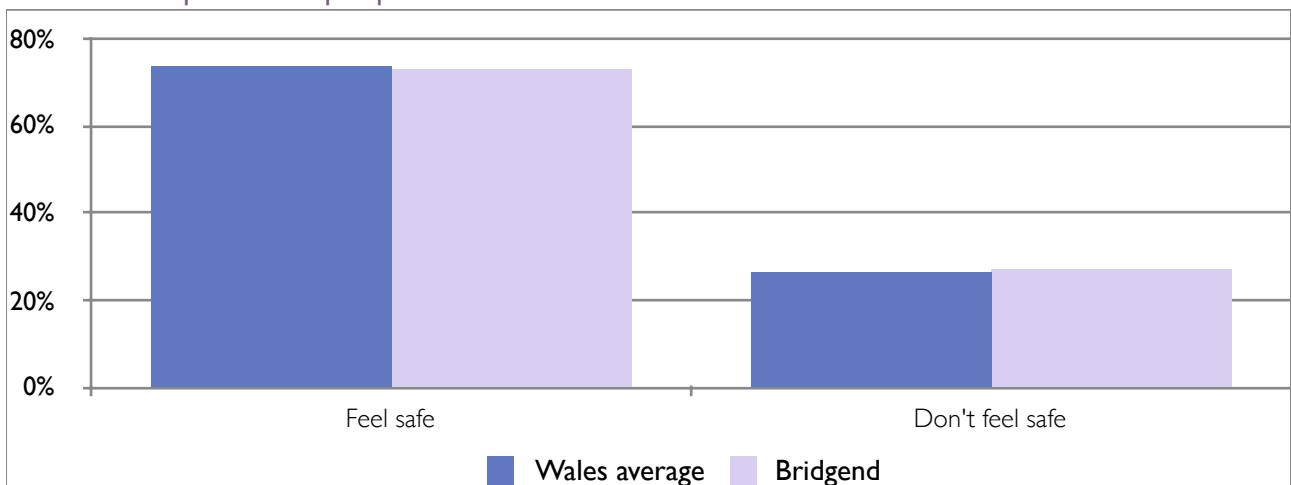
Source: National Survey for Wales

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[17] This is connected to the Welsh Government's objective of nurturing cohesive communities

[18] It should be noted that the confidence intervals for this data at an individual local authority level tend to be relatively wide. Therefore this should be understood when interpreting the data

The survey also asks people about their current financial position in terms of their ability to keep up with paying bills (relevant to the LDS theme of Tackling Poverty and Social Exclusion). Broadly, only 60% of Bridgend residents of non-pension age felt that they are able to fully keep up with bill payment without any struggle, the remainder experiencing difficulties either constantly or from time to time. Again, the profile broadly matched that seen elsewhere. The survey data suggests that a greater proportion of people of pension age within Bridgend (82%[19]) are able to fully keep up with bill payments at all time, matching levels seen elsewhere.

Again, one of the LDS themes relates to digital inclusion and broadband connectivity, with the aim of increasing digital technology across rural businesses and communities. The NSW data suggests that the number of individuals who have internet access at home within Bridgend could be marginally lower than seen elsewhere in Wales. 81% of those who responded to the survey had an internet connection at home, compared to 84% in Wales as a whole[20].

However, in terms of broadband connectivity, the latest data released by Ofcom[21] shows that 91% of premises in Bridgend had potential access to superfast broadband connections in 2016, compared to 85% in Wales. Therefore superfast broadband connectivity is high in Bridgend when compared to other areas (for example in parts of rural North & West Wales superfast availability is broadly around 75%).

Conclusion

The broad conclusion from the analysis of available updated socioeconomic data is that conditions within rural Bridgend do not appear to differ markedly from the wider Bridgend area. The rural and non-rural parts of the local authorities – whilst facing their own specific challenges – are relatively similar.

In terms of understanding whether some of the socioeconomic issues identified in the LDS have changed as a consequence of any activity, it is simply too early to say. It is our expectation that, given that scale and nature of the projects supported thus far, that it is unlikely any macro-level changes in socioeconomic conditions would yet have occurred.

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[19] *Again noting the relatively wide confidence intervals associated with this data*

[20] *Again noting the wide confidence intervals associated with geography at lower levels*

[21] *Connected Nations 2016 - Ofcom*

Annex Six: The changing policy context

City Regions

Swansea City Region

Although not within the Swansea City Region[22] as such, rural Bridgend is adjacent to this and with projects such as Kenfig Natura 2000 on the doorstep of the City Region, has potential links and an interest in what is happening.

The City Region City Deal which was signed in March 2017 is described as a '*£1.3 billion deal that will transform the economic landscape of the area, boost the local economy by £1.8 billion, and generate almost 10,000 new jobs over the next 15 years*'[23]. Life science and wellbeing is one of the strands that runs through the City Deal with one major development proposed at Llanelli (a Wellness Village and Life Sciences Village incorporating a 'state of the art' sports and leisure centre, a wellness hotel, assisted living village and a wellbeing centre set within a green eco park). Another element is a 'Homes as Power Stations' project led by Neath Port Talbot Council with a main aim to reduce fuel poverty with consequent health and wellbeing benefits. There might be potential for joint working with Neath Port Talbot Council (and Swansea University who are also central to it) on the 'Homes as Power Stations' project, linking it with the work beginning around community renewable energy opportunities.

Cardiff Capital Region

Bridgend County Borough is part of the Cardiff Capital Region. Its City Deal, signed in March 2017, is worth £1.2bn, to deliver 25,000 new jobs and lever in £4bn of private sector investment. It has four themes: Connectivity, Skills, Innovation & Growth and Identity. One dimension of the City Deal is the South East Wales Metro proposals which include electrification of the Valleys Railway lines. Improved transport links could be a major benefit to the rural areas of Bridgend including access into the valleys. The timetable for this development over the next 15 years, and with contracts following tenders not anticipated to start until 2018, will put the opportunities well beyond that of the current LEADER timetable though. Investing in the digital network is another strand of activity including looking at next generation technologies, wifi on public transport and other digital solutions.

Cardiff Capital Region City Deal Growth and Competitiveness (2016) discusses the need to move forward with growth plans on several fronts, to develop its inter-connectivity, to address improving productivity and competitiveness and also reducing poverty. Green and blue infrastructure are recognised as a potential economic driver for the Capital region and as important to the quality of life as to development of tourism, as demand for tourism is significantly from residents of the Capital Region. It looks at international comparators and draws out conclusions on the need for long term planning, and that investment in individual projects and fragmented action is not going to work. It identifies that coordination and integration of activities and governance are critical to success of City Deal. Whilst it does make a number of recommendations on how City Deal might shape itself, the two aspects which seem most relevant are (a) the potential of the South East Wales Metro which could open up access to areas of rural Bridgend and (b) its strong focus on the need for integration and coordination, a principle which is strong in LEADER and re-emphasised even for the Capital Region level. ADD

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[22] *It covers four local authority areas; Neath Port Talbot, Swansea, Carmarthenshire and Pembrokeshire.*

[23] *http://www.swanseabaycityregion.com/en/t0_cd.htm*

Three Linked Acts

Three linked Welsh Government Acts look at the long term wellbeing of Wales

1. The Wellbeing of Future Generations Act (Wales) 2015

This sets out seven wellbeing goals[24] with the intention of getting public bodies to work together more, look to the long term and take a more joined up approach (it sets out five ways of working to do this)[25]. Local authorities and Natural Resources Wales are both organisations covered by the requirements of this Act, and both important players in TRC in Bridgend. These seven goals combined with a requirement to work to a sustainable development principle (as well as publish wellbeing statements) means that public bodies will be looking to meet these requirements. Again the emphasis is on collaboration, integration, involvement are important, all also important in LEADER. Looking to the long term is also important. Where this might be relevant in the LEADER context is looking to the sustainability of the initial investments made with LEADER funding to identify possible paths forward beyond the early stages of work that TRC can help with (and assuming early stage work proposes subsequent development). The issue of thinking longer term can also run counter to programmes where there is a requirement for delivery of output targets within a given timescale – but TRC may be helpful here as the Preparatory Support Scheme could have the potential to integrate some longer term thinking into it; for example could it support early stage planning on how the South East Wales Metro proposals could support development opportunities in the Bridgend Valleys in the longer term?

Bridgend CBC has been out to consultation on a draft wellbeing assessment (January 2017). It raises some relevant (to the LDS) challenges for economic, environmental, social and cultural wellbeing moving forward that include:

- An economic divide between those doing OK and those on the economic margins; and a particular problem with economic opportunities for young people
- Issues of linking public transport and green infrastructure; and the wider point about availability of public transport limiting access to services and facilities
- Keeping cultural and historic assets, a reducing Welsh speaking population and issues of digital inclusion

These could be themes where TRC is well placed to undertake some initial preparatory work, addressing the issues in the rural context.

2. Environment Act Wales 2016

Again this is about integration and a joined up approach, the main aim being about managing resources '*in a more proactive, sustainable and joined-up manner and to establish the legislative framework necessary to tackle climate change*'. Area statements are one of three provisions in the Act to take forward this approach. Area Statements are about applying a proposed National Natural Resources Policy at the local level. A consultation to inform preparation of the NNRP was closed earlier this year (February 2017). This looked at proposed priority themes covering:

- 'Accelerating green growth by increasing resource efficiency, renewable energy and supporting innovation

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[24] *A prosperous Wales, a resilient Wales, a healthier Wales, a more equal Wales, a Wales of cohesive communities, a Wales of vibrant culture and thriving Welsh language, a globally responsible Wales*

[25] *The five ways are taking a long term view, integrated approach, involving a diversity of population, working collaboratively and understanding the root causes to take a preventative approach.*

- Delivering nature-based solutions to improve resilience and the benefits derived from natural resources
- Improving community and individual well being by taking a place and landscape based approach'

All three have a good relationship with the LDS and its strategic/delivery objectives. It also looks at the wider question of what it means to achieve sustainable management of natural resources and also the question of ecosystems resilience. IS THIS ALL RELEVANT TO NEXT STEPS WITH KENFIG?

3. Planning (Wales) Act 2015

The most relevant aspect of this is its focus on sustainable development in the field of development planning and management and a requirement to carry out sustainable development *'for the purpose of ensuring that the development and use of land contribute to improving the economic, social, environmental and cultural well-being of Wales'*.

Welsh Language Standards

The Welsh Language Standards came into being following the Welsh Language Measure of 2011. There are annual Welsh Standards Regulations. The 2015 Regulations[26] are the ones specific to County Boroughs. They set out standards for service delivery (to promote or facilitate the use of the Welsh language), policy standards, operational standards, promotional standards, record keeping standards and other supplementary matters. We assume that all these standards are embedded in BCBC processes including those of Reach (as BCBC is its administrative body). Subsequent annual Regulations have dealt with other public bodies.

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[26] *2015 No. 996 (W. 68) WELSH LANGUAGE. The Welsh Language Standards (No. 1) Regulations 2015*