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# KERRY HILLS, VALES AND TRAILS

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## Feasibility Study



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# Executive Summary

## Background

Resources for Change (R4C) was commissioned by Campaign for the Protection of Rural Wales, Montgomeryshire branch (CPRW) to undertake a feasibility study into the viability of developing a Landscape Partnership Scheme (LPS) for submission to Heritage Lottery Fund (HLF), if possible at the end of May 2017.

## Timing

The feasibility study (and development of the application had been originally planned to last a year, this was then reduced to eight months; in the event only four months was available, as the work needed to focus on the HLF deadline for submission of 31<sup>st</sup> May. This reduction in time considerably constrained the ability to work in a developmental way with the bodies that would be key to the success of an LPS, for example NRW, PCC and NPTC.

## Heritage Lottery Fund Landscape Partnership Scheme

The LPS aims are wide and far-reaching offering considerable opportunities for the landscape and the people within and adjacent; and R4C emphasised the requirement to meet all nine outcomes listed in the HLF guidance, and the high level of competition to become an LPS.

- Some of the project ideas met some of the HLF objectives, but there remained gaps, these needed considerably more time and capacity to develop.

HLF Landscape Partnership Schemes must demonstrate **landscape scale difference** through the scheme; this means that the larger the area, the more challenging the work, and the greater the capacity and funding required to achieve that difference.

## Partnership

The potential partners for an LPS, who submitted projects, and /or indicated they would be willing to play a role in delivery include:

Powys County Council	Natural Resources Wales
PAVO	Ridgeway Artists
CPRW	Newtown Textile Museum
Conservation of Upland Powys	Severn Rivers Trust
Kerry Local History Group	Brynllowarch Hall School
Sarn Local History Group	Montgomery Town Council
Montgomery Waterways Restoration Trust (Friends of Montgomery Canal)	Neath Port Talbot College Group, Newtown
Montgomeryshire Wildlife Trust	

Some of the groups listed have limited capacity for practical delivery, strategic planning and expertise in project management. Others are well placed and have registered a strong interest and enthusiasm.

## Alternatives and options

The Landscape Partnership Scheme offers a unique approach by drawing together individuals, groups, organisations, public bodies and businesses with a common, shared vision. Their projects have a shared aim and work in tandem, as part of a whole.

The majority of individual projects, can still achieve much, by applying for funding and working within their existing networks; however, it will not be possible to make the whole scheme, landscape scale difference that an LPS offers, and without partnership at their core there is less opportunity for shared learning across sectors and areas of expertise.

Groups that have identified projects may wish to proceed on an individual basis, and PAVO has funding advisors and the software to search for appropriate grants to assist them.

## Recommendations

It must be borne in minds that an HLF Landscape Partnership Scheme is up to two years in its funded Development Stage and up to a further five years in its implementation stage. These recommendations are made in light of the longevity of any such scheme which will still be operational in 2025 / 26.

1. PAVO is new to LPS, but not to large scale Lottery funding of course. They are an ideal partner in this scheme as there is such potential for developing a stronger volunteering community within and adjacent to the LPS, as well as improving internal readiness of the voluntary groups to recruit, manage and support greater numbers of volunteers. Any potential partnership taking this forward should be aware that HLF has greatest experience in dealing with lead bodies that are local authorities, other significant public bodies or major charities from the natural heritage sector. Because of this a lead body that does fit into one of the categories above will need to demonstrate its knowledge of LPS and its capacity.
2. The Steering Group should be expanded to include those partners who are willing to engage with the LPS, and who have the experience, capacity and resources to make a real difference. These include PCC, NRW, NPTC, Brynllwarch School, SRT, MWT and FUW (or NFU). They should be represented by officers at a senior enough level to make either decisions at meetings on behalf of their organisations, or drive them through their own organisations.
3. The Steering Group should draft a set of rules for how decisions are made, who records meetings etc. It may be that one of the “newer” partners can offer support with this, and some of the existing group take a step back.
4. The Steering Group needs seriously to consider the size of the area once more, and recognize it is not about making a better case to HLF, but more listening to, taking note of, and acting upon their advice. Because of the circumstances of this particular steering group their chances of success are greatest with an area of under 100sq km and a total grant application of under £1 million.

5. The Steering Group needs to identify “real” matched funding opportunities, (cash / staff time/ goods and services) as opposed to “virtual” opportunities (volunteer time) in order to strengthen the application. These may well come from the partners on the enhanced Steering Group.

## Background

Resources for Change (R4C) was commissioned by Campaign for the Protection of Rural Wales, Montgomeryshire branch (CPRW) to undertake a feasibility study into the viability of developing a Landscape Partnership Scheme (LPS) for submission to Heritage Lottery Fund (HLF), if possible at the end of May 2017. Funding was received for from the Arwain (Leader) Funding scheme run by Powys County Council by CPRW, who led a Steering Group to develop this work. The original request for funding was made in June 2016 to allow sufficient time to meet the HLF deadline, but owing to the delay in receiving funding the work and any subsequent submission to HLF had to be completed in four and a half months. Tender brief see appendix 1

The initial Steering Group comprised five members, representing the following bodies: CPRW Montgomeryshire, Montgomery Rural Cluster Group, Montgomeryshire Wildlife Trust, Conservation of Upland Powys, Sarn and Kerry History Groups. In addition, cultural heritage expertise was provided by Dr RJ Silvester and the treasurer of CPRW Montgomeryshire and the Powys County Council Regeneration Officer attended each meeting.

Scoping had been undertaken during the previous two and a half years by two of the voluntary groups and this had produced a list of approximately fifteen organisations and public bodies that had registered an interest in developing an LPS at a facilitated session held in Autumn 2015 to consider the prospect of developing a partnership that would develop and deliver an LPS. Three volunteers had also attended an HLF LPS training day in early 2016 at Loggerheads, Mold.

All of the bodies, organisations and groups that had shown interest were emailed by CPRW upon confirmation of the grant, and invited to join the Steering Group; however, owing to the intensive work needed over the short timescale the steering group was as set out above.

## The HLF Landscape Partnership Scheme context and process

HLF supports Landscape Partnership Schemes, which can cover an area of 20 square kilometres up to 200 square kilometres (larger by exception) the majority of which are developed and managed by statutory bodies such as County Councils, National Parks, AONBs and by larger Third Sector organisations, such as RSPB, Wildlife Trusts etc.

Their purpose is as follows:

*Landscape Partnership schemes put heritage conservation at the heart of rural and peri-urban regeneration. Local, regional and national organisations work together to make a real difference to landscapes and communities for the long term. They do this by conserving habitats at landscape-scale, promoting joined-up management, reviving long-lost skills, and much more. HLF-funded projects make a major contribution to work in the UK on implementing the European Landscape Convention.<sup>1</sup>*

Grants for the schemes, which can last up to seven years range from under £1 million pounds to over £3 million pounds. There is an expectation of significant partnership working, matched funding,

(some of which can be “in kind”) and that the nine objectives expressed by HLF in their guidance will be met.

The HLF Landscape Partnership Scheme process is in two stages:

The first stage: an application is made for a potential scheme; the provisional area, overall costs, partners, likely individual projects, and scheme outcomes are identified. If successful, the body is invited to submit a second stage application. This includes all the above information, but in accurate detail, together with additional requirements as outlined by HLF, including a Landscape Character Assessment, an Audience Development Plan, a Monitoring and Evaluation Plan.

This study was to look into, and if possible, submit a first stage application. They are assessed annually by HLF, with a deadline for submission of 31<sup>st</sup> May 2017.

## Process

### Initial meetings and project analysis

Upon appointment R4C met the steering group and reviewed the workplan, meetings and communications. At the inception, the steering group decided that they required more frequent meetings than planned owing to the speed at which the contract had to be undertaken and that written updates would be provided for dissemination.

A workshop was held two weeks later to which potential stakeholders, comprising 75 individuals, councillors, groups, organisations, businesses and public bodies, were invited. 27 attended and 12 apologies were received, including those who wished to remain engaged with the process.

The area identified prior to being awarded Arwain funding was just over 200sq km and maps, produced by PCC, were discussed. A pro forma was provided to enable participants to bring forward their suggestions for projects that would mesh together to form a shared vision and partnership, and which included the activities, costs, gifts in kind, voluntary and cash contribution and the level of funding they would require.

R4C undertook an initial analysis of the project proposals to ascertain:

- a. Whether they fell within the HLF guidance for a Landscape Partnership Scheme
- b. Whether they were feasible
- c. Whether the indicative costs were reasonable
- d. Whether the objectives were deliverable within a five-year timescale

A few projects were not able to be included at this stage, because they were for capital works on land or buildings that a group did not own or lease; because the potential costs made them too expensive; or because there were overlaps with other proposed projects. Where possible, projects undertaking similar activity with the same potential outcomes were grouped together and the opportunity for partnership working and shared learning and support was identified.

All the groups and individuals who submitted potential projects were contacted, to talk through the partnership process, their projects and identify how they met the LPS criteria, and outcomes. Meetings were also held with Neath Port Talbot College, Powys Campus (NPTC) and Powys County Council. Detailed discussions were also held with Natural Resources Wales and HLF.

#### Four broad themes emerged:

- Trails and Transport
- The Story of Sheep
- Opportunities for Wildlife
- Contested Country

The next stage was a meeting with HLF Development Officers to ascertain whether the potential proposal was one that met HLF guidelines and had a chance of success in a very competitive funding environment.

#### HLF meeting and advice

A meeting was held with the HLF LPS Development Officers, R4C and the Client (Chair of the Steering Group) and advice was given on how to develop the proposals into a strong application. The HLF Development Officers identified the following as issues to be addressed before submission:

- There needs to be a strong lead body to manage the funding, monitoring and contractual agreements. This body must have experience of major fund / project / partnership management.
- The proposed area at 200sq km was too large for the capacity of the group and they recommended starting at 20sq km, focusing on a specific landscape feature and then extending outwards.
- Some of the projects were disproportionately large and costly but could work better as standalone projects, for which funding could be sought independently, rather than within the scheme; then they could work with / mesh into the LPS. These projects could be considered as providing matched funding.
- The Kerry Hill Sheep worked well as a brand and the story could hang together well.
- Some projects had a tenuous connection with the ethos of the LPS, and might weaken the whole if included.
- The partnership at that stage was small and actual delivery partners were very limited. The steering group should be realistic about its ability and capacity to deliver a landscape-scale project over a very large area with limited public partnership involvement.



- The steering group should not focus on location of communities but on the landscape and heritage, as the adjacent communities, and especially their residents, could still be part of the scheme.
- No capital works could be allowed outside the scheme area, using scheme funding
- The committee making the decision would expect to see 'major players' such as Powys County Council, and Natural Resources Wales **actively involved** in the process

### Acting on the HLF Officers' advice

R4C undertook further detailed analysis of the projects and the proposed scheme area. In line with HLF Officer recommendations a reduced and revised area was identified. This included the whole of the River Mule and its catchment, part of the canal and River Severn from north of Newtown to Abermule and amounted to over 70 sq km as shown on this map.

R4C considered that this option would include almost all the potential project partners, apart from just three potential groups/ organisations that now fell outside the proposed area.

R4C recommended that the Steering Group could increase the likelihood of a successful submission to HLF by:

- Reducing the proposed LPS area to the Mule catchment area which would measure approximately 70 sq km and which would enable the delivery to be more in proportion with known and existing capacity.
- Creating a more clearly identifiable landscape with Kerry Hill sheep, water, woodland and the tracks & trails as the focus; thus, strengthening the Kerry Hill sheep brand.
- Encouraging larger projects to apply for other funding and this could increase the LPS matched funding pot and complement the scheme through partnership working.
- Ensuring local communities would be engaged through the scheme activities and events as before.
- Identifying, early in the process, a lead body for the application.

R4C produced a SWOT analysis for the steering group meeting to help inform their decision about establishing the boundaries of the area; this is set out below:

### OPTION 1 - WHOLE (original) AREA WITH TRAILS AS BOUNDARIES (over 200 sq km):

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>• This is what we started with, people know / have heard about it</li> <li>• Groups / orgs submitted for the wider area</li> <li>• The name works</li> <li>• Clearly defined boundaries, in most places, but not all</li> </ul>	<ul style="list-style-type: none"> <li>• Very large area, without much landscape difference at the end of the scheme</li> <li>• It prevents further LPSs within the boundary</li> <li>• HLF recommend that we reduce the area There are at least 2 potential schemes within the area.</li> <li>• 2 projects could be submitted outside this proposal.</li> </ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>• Engage more organisations</li> <li>• Increase the project delivery through developing projects in the Steering group and get contractors to implement</li> </ul>	<ul style="list-style-type: none"> <li>• HLF will reject the scheme, <i>[as it is contrary to their advice]</i></li> </ul>

The boundaries of the area would be Severn Way, Offa's Dyke, Kerry Ridgeway, Glyndŵr's Way.  
No map is available for Option 1.

OPTION 2 MULE CATCHMENT ONLY (APPROX 70 sq kms)

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>• Clear focussed area with clear simple story – <i>[Kerry sheep and travel/trails]</i></li> <li>• Visually simple</li> <li>• Involves a good range of partners</li> <li>• Opportunity to make a significant difference to biodiversity, water quality locally</li> <li>• Strongest option for HLF</li> </ul>	<ul style="list-style-type: none"> <li>• Doesn't include as much built heritage, although Canal has some but is it in the right place</li> <li>• None of the Registered Historic Landscape included</li> <li>• Loses some of the projects e.g. Dolforwyn Woods, Montgomery <i>[walls]</i>, Llandyssil Community nature reserve.</li> </ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>• Advice from HLF indicates this is most likely to be funded</li> <li>• Small and focussed project within the capacity of the partnership so</li> <li>• Likely to be successful</li> <li>• <i>[Offers]</i> an opportunity for another LPS focussing on the historic landscape and castles [/ hillforts]</li> <li>• Small applications for 'excluded projects' may be easier to fund</li> </ul>	<ul style="list-style-type: none"> <li>• Having engaged and enthused a wider partnership some may be excluded.</li> <li>• Montgomery and Llandyssil communities not included in capital works</li> <li>• This 1st application may mean that nobody wants to develop a 2<sup>nd</sup>.</li> </ul>

Some time was spent discussing this option; however, a majority of the steering group wanted to extend the area beyond the Mule catchment and undertake further analysis of this larger area (which included part of the Vale of Montgomery Historic Landscape, Offa's Dyke and several hillforts and castles as well as additional small communities. The map below shows Option 2:

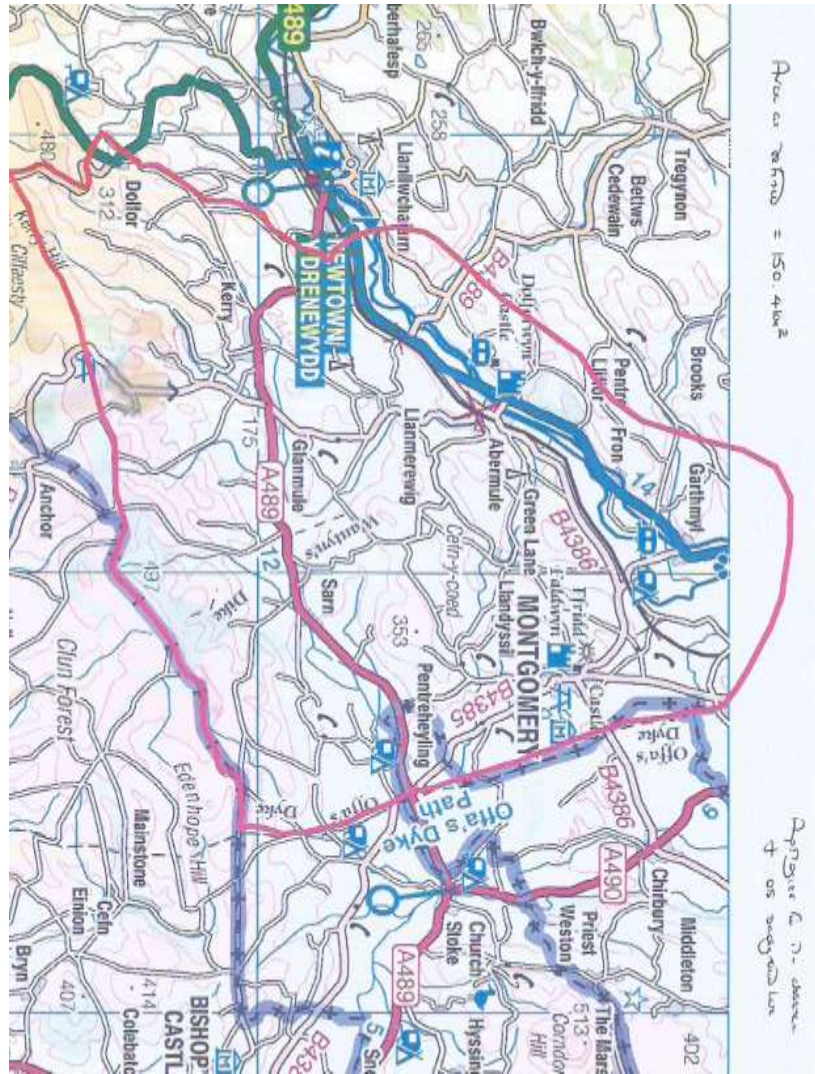


OPTION 3 Larger than the Mule, but smaller than the original area (150 sq km)

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>• Reduced area <i>[compared to the initially proposed landscape area]</i> but includes all communities in the Vale of Montgomery Rural Cluster</li> <li>• Includes <i>[part of the]</i> Outstanding Registered Historic Landscape</li> <li>• Includes greater number of stakeholders within scheme area</li> <li>• includes National Trail , Offa's Dyke</li> </ul>	<ul style="list-style-type: none"> <li>• Not a simple focussed story</li> <li>• Almost doubles the <i>[landscape]</i> area for little <i>[additional]</i> delivery</li> </ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>• Links with Montgomery Town Council walking and tourism</li> <li>• Engages a community project in Llandyssil which could add PR opportunities</li> <li>• Encompasses 4 MWT sites exemplifying different habitats</li> </ul>	<ul style="list-style-type: none"> <li>• More likely to be rejected by HLF</li> <li>• The breadth of area and <i>[additional]</i> themes may dilute the scheme and weaken delivery</li> <li>• <i>[Appears less coherent than the Mule area, as combines more themes]</i></li> </ul>

After discussion, the Steering Group agreed to proceed towards making an application to HLF for a Landscape Partnership Scheme that reflected an area as outlined in Option 3, because a majority of the steering group felt this larger area was strengthened by the inclusion of the

Historic Landscape Area, Offa's Dyke and additional communities. The map below shows Option 3.



Several options for the lead body were discussed, including Powys County Council, and Powys Association of Voluntary Organisations (PAVO).

Given the reservations that the HLF officers had expressed about the size of area and delivery capacity of the group, the client voiced some concerns about the appropriateness of the LPS process, and discussed whether alternative funding would be available for some, if not all the work. The steering group agreed that R4C would:

- a. Identify and work with a potential lead partner
- b. Continue to work with individual project partners to gather sufficient information about potential projects to inform the application process
- c. It was agreed that R4C should make an initial approach to PAVO on behalf of the steering group.
- d. Continue to work towards a draft application form for submission by the May deadline based on option 3.

The date of the Validation meeting was agreed as 26<sup>th</sup> April at Kerry, and a steering group meeting was booked for 18<sup>th</sup> April.

### Drafting an HLF application

The meeting on 18<sup>th</sup> April was not quorate owing to illness, accident, holidays and other personal circumstances. This meant that making a decision on the project area, now the revised draft map had been emailed to the group was difficult and there was insufficient time for a quorate meeting prior to the Validation.

It was agreed that owing to the low attendance and limited time, R4C should circulate an email to all steering group members with what the small meeting had identified as key options. The decision would be presented at the Validation meeting to the wider partnership group, who had submitted projects. The options were:

- A) *Develop a scheme in line with the HLF advice i.e. smaller scale, with a clearly defined landscape and a lower budget (ideally under £1million)*
- B) *Continue with the larger area (and more expensive project) as identified in the previous meeting*
- C) *Not make an application to HLF for an LPS in this round, but accept a feasibility study which would identify how the individual projects could be taken forward by the respective groups*

The steering group had differing views. Reservations were voiced by the chair as to the appropriateness of the LPS Scheme and whether other funding schemes might be a better fit for the projects they wished to undertake.



It was decided that R4C should prepare a bid for HLF for a LPS covering approximately 150 sq km (Option 3 above) and to present the outline of this at the Validation meeting.

### Validation meeting

The validation meeting was held on 26<sup>th</sup> April, when findings, conclusions and recommendations were presented and discussed with the potential partners. Representatives from Powys County Council, and PAVO were also present. Powys County Council had produced an updated map for the meeting.

A draft Vision Statement and Scheme Summary were presented and agreed see below.

### Shared Vision

Our hills, vales and trails will continue to be a special place, where quality of the natural environment and heritage inspires and is valued; where welcoming communities, proud of their heritage and surroundings share experiences and skills to sustain a thriving and healthy landscape for all people.

### Scheme Summary

The scheme will gather and tell the history of the Severn Valley, Vales of Montgomery and Kerry to the Ridgeway; reconnecting communities with their past, to understand the present and how we can work together for the future. Occupied for over 3000 years, this mosaic of small fields and ancient hedgerows, scattered with castles, hillforts, ancient woodlands, historic byways, stock farms and settlements has yielded a wealth of knowledge about our heritage that will be shared more widely than ever before.

Working with local communities, farmers and, landowners we will restore habitat; create wildlife corridors and develop processes; inspiring others to emulate best practice in conservation, increasing biodiversity. We will tell the story of Kerry Hill Sheep, to revive our own sense of place; weaving the landscape's threads together using local materials, skills and traditions and rekindling the relationship between the landscape and the people, whether residents or visitors.

The HLF Development Officer attended the meeting to provide advice and guidance to the partnership; she was also able to respond to questions put forward by the participants, and advised on weaknesses in the proposed scheme and how to strengthen it. There was considerable discussion on the total cost, matched funding and the size of the area.



Following the meeting the HLF Development Officer set out the key points in an email:

*Following on from the meeting that we had last month, you have reduced the project size to 150 km<sup>2</sup> and reduced the grant to approx. £1m. This is still a large area and you will need to make sure that the grant will still have a big impact on the whole area. It is up to you how you do this, I feel that there are a few options:*

- *Reduce the area further to have a bigger impact across the whole space. I know the partnership are not keen to do this and you do have to keep the landscape character in mind.*
- *Increase the money coming into the project, either from HLF or other sources. As we discussed in the first meeting, this is a relatively small partnership so I wouldn't encourage you to significantly increase your grant request from us.*
- *Evidence how you will have an impact across the whole area using your plans as currently presented.*

## PAVO

R4C and the Chair of the Steering Group met with PAVO at the beginning of May, and it was agreed that in principle, they would consider supporting the application as lead partner, subject to examining the draft application. PAVO expressed concern about the amount of time available to prepare this draft bid, and suggested, that, if the group was unable to proceed with a bid in 2017, they would offer to support the steering group to build its capacity, together with that of other partners, to develop an application for submission in 2018.

R4C produced a draft HLF application within the parameters agreed by the steering group and presented it to the steering group and PAVO for consideration. PAVO considered this carefully but decided they were not, at this stage willing to support such an application in the role of lead body. They repeated their offer to work with the groups and organisations involved so that a viable application can be submitted in 2018.

This left the group unable to submit a 2017 HLF Landscape Partnership Scheme application because there was no lead body.

## Analysis

### Timing

The feasibility study (and development of the application had been originally planned to last a year, this was then reduced to eight months; in the event only four months was available, as the work needed to focus on the HLF deadline for submission of 31<sup>st</sup> May. This reduction in time considerably constrained the ability to work in a developmental way with the bodies that would be key to the success of an LPS, for example NRW, PCC and NPTC.

- The Steering Group, comprising entirely of volunteers, gave their time and skills willingly within the short time frame.
- The focus of the Steering Group, with its emphasis and experience on volunteering on landscape and heritage groups might initially look suitable, but many of the HLF outcomes focus on the benefits of a LPS for people, and therefore the inclusion of representatives of groups working directly with beneficiaries is key.
- Some of the project discussions held by the Steering Group at a local level, whilst useful did not convert into offers of matched funding, although those partner organisations remain interested and willing to participate.
- Larger partner groups (NRW, colleges, county councils etc.) also have more structured decision-making processes, so a commitment of finance, as matched funding, for example would need to be authorized at Board level. The timetable did not allow for this, and was too short to meet these organizational processes, which were furthered hampered, in the case of the County Council, by local council elections (May 2017).

### Meeting LPS Aims and Outcomes

The LPS aims are wide and far-reaching offering considerable opportunities for the landscape and the people within and adjacent; and R4C emphasised the requirement to meet all nine outcomes listed in the HLF guidance, and the high level of competition to become an LPS.

- Some of the project ideas met some of the HLF objectives, but there remained gaps; these needed considerably more time and capacity to develop.

HLF Landscape Partnership Schemes must demonstrate **landscape-scale difference** through the scheme; this means that the larger the area, the more challenging the work, and the greater the capacity and funding required to achieve that difference.

- The funding required to achieve landscape change, together with a requirement of matched funding was beyond the reach of the Steering Group
- The Steering Group, lacked experience in the types of on the ground delivery that can provide evidence for a physical difference.

- PAVO has strong experience in managing large scale funding projects, but it has little experience in large-scale landscape change projects, and no experience of HLF landscape partnership schemes, because none have been developed in Powys.

## Partnership

The potential partners for an LPS, who submitted projects, and /or indicated they would be willing to play a role in delivery include:

- CPRW
- Powys County Council
- PAVO
- Conservation of Upland Powys
- Kerry Local History Group
- Sarn Local History Group
- Montgomeryshire Wildlife Trust
- Montgomery Waterways Restoration Trust (Friends of Montgomery Canal)
- Natural Resources Wales
- Ridgeway Artists
- Textile Museum
- Severn Rivers Trust
- Brynllwarch Hall School
- Neath Port Talbot College Group, Newtown
- Montgomery Town Council

Some of the groups listed have limited capacity for practical delivery, strategic planning and expertise in project management. Others are well placed and have registered a strong interest and enthusiasm. Some who might be expected to provide support in the form of matched funding, (albeit in staff time etc) did not become engaged soon enough or at the right (senior) level early enough to be able to make a decision about the level of their engagement, although they remain interested.

## Alternatives and Options

The LPS offers a unique approach by drawing together individuals, groups, organisations, public bodies and businesses with a common, shared vision. Their projects have a shared aim and work in tandem, as part of a whole.

The majority of individual projects, can still achieve much, by applying for funding and working within their existing networks; however, it will not be possible to make the whole scheme, landscape scale difference that an LPS offers, and without partnership at their core there is less opportunity for shared learning across sectors and areas of expertise.

Groups that have identified projects may wish to proceed on an individual basis, and PAVO has funding advisors and the software to search for appropriate grants to assist them.



## Conclusions

1. This Feasibility Study has found that currently the proposal is not ready to be submitted as a Landscape Partnership Scheme in 2017 for the following reasons:
  - 1.1 The Steering Group is too small in numbers, and lacks the capacity to drive through such a complex, multi- partnered scheme.
  - 1.2 The period of time available to engage with willing partners (who have much to offer such an LPS in terms of skills, expertise, capacity and matched funding) is significantly more than that allowed under this feasibility study (our recommendation is that this work would take at least another 9 months to complete). Larger bodies require a longer period for partnerships such as this to be discussed at Board or senior level before committing; meetings need to be booked months in advance.
  - 1.3 Some of the individual partners lack capacity within their groups and so would need additional support to develop and deliver projects.
  - 1.4 The identification of a lead partner is key, and this should be re-visited, with an early commitment obtained
  - 1.5 HLF is used to applications from large-scale organisations with a known track record. If it is to award a significant sum of money to a partnership of groups with little track record in the Heritage and Landscape field, it will need to be confident about the risk before making such an award. This will include the capacity of partners, and their willingness to work with HLF, taking appropriate advice where necessary.
  - 1.6 The area remains larger in size than HLF has indicated they would be willing to fund for the current Partnership.
  - 1.7 Some of the projects identified have not been approved or authorized by their governing bodies.
  - 1.8 There is currently insufficient capacity to make a landscape scale difference to the selected area.

The significance of including PAVO as the lead partner or as a member of the Partnership Management Board should not be underestimated. The aspect of legacy is vital to any scheme or project, but for an HLF scheme it is intrinsic to the development of the entire process. There is a clear understanding that the current climate is unlikely to allow for significant public funding to be available for ongoing support and maintenance of any works that are not a legislative requirement. The role of volunteers, and more importantly, well organized and trained groups that are self-sustaining is going to be the main method of ensuring robust, healthy rural communities. Utilising the skills, energy and commitment of local people benefit the environment, community and individuals meets the outcomes set out by HLF and embeds the scheme solidly within the local community.

## Recommendations

It must be borne in mind that an HLF Landscape Partnership Scheme is up to two years in its funded Development Stage and up to a further five years in its implementation stage. These recommendations are made in light of the longevity of any such scheme which will still be operational in 2025 / 26.

- 1 PAVO is new to LPS, but not to large scale Lottery funding of course. They are an ideal partner in this scheme as there is such potential for developing a stronger volunteering community within and adjacent to the LPS, as well as improving internal readiness of the voluntary groups to recruit, manage and support greater numbers of volunteers. This would be an unusual partnership for a LPS; in our experience (over 45 LPS evaluations) we have not met one where a similar organisation has a key role. Any potential partnership taking this forward should be aware that HLF has greatest experience in dealing with lead bodies that are local authorities, other significant public bodies or major charities from the natural heritage sector. Because of this a lead body that does fit into one of the categories above will need to demonstrate its knowledge of LPS and its capacity.
- 2 The Steering Group should, with the support of PAVO be expanded to include those partners who are willing to engage with the LPS, and who have the experience, capacity and resources to make a real difference. These include NRW, NPTC, Brynllwarch School, PCC, SRT, MWT and FUW (or NFU). They should be represented by officers at a senior enough level to make either decisions at meetings on behalf of their organisations, or drive them through their own organisations. Using officer time, means the committee is not constrained by absence owing to individual circumstances, as organisations will be expected to send another representative. This will strengthen the Steering Group, which would then form the nucleus of any Partnership Management Board under a LPS.
- 3 The Steering Group should draft a set of rules for how decisions are made, who records meetings etc. It may be that one of the “newer” partners can offer support with this, and some of the existing group take a step back.
- 4 The Steering Group needs to seriously consider the size of the area once more, and recognize it is not about making a better case to HLF, but more listening to, taking note of, and acting upon their advice. Because of the particular circumstances of this particular steering group their chances of success are greatest with an area of under 100sq km and a total grant application of under £1 million.

- 5 The Steering Group needs to identify “real” matched funding opportunities, (cash / staff time/ goods and services) as opposed to “virtual” opportunities (volunteer time) in order to strengthen the application. These may well come from the partners on the enhanced Steering Group.
  
- 6 Some of the smaller groups need to consider whether they could achieve their own aims better by applying for a small grant in their own right to undertake the projects they have identified they want to do. This should not exclude them from enjoying and benefitting from the activities within a LPS.
  
- 7 That this report is shared with all potential partners, and especially those who submitted projects which were accepted for consideration.

Steering Group members have worked hard and given a lot of time to this study, and the R4C team wish this to be noted and acknowledged; without these six volunteers, the Feasibility Study and draft application would not be where they are now.

## Appendix

Tender brief:



**Ymgyrch Diogelu Cymru Wledig (Sir Trefaldwyn)**

**Campaign for the Protection of Rural Wales (Montgomeryshire)**

Cadeirydd / Chairman Christopher Fuller

**Kerry Hills, Vales and Trails Partnership**

### **Invitation to Tender**

**Background:** This partnership was instigated by the Montgomeryshire Branch of the Campaign for the Protection of Rural Wales along with a number of other community, voluntary, business and statutory sector organisations who identified the potential of co-operative working to better promote understanding, enjoyment and appreciation of the Kerry Ridgeway area and expand existing and new economic opportunities.

The area has the Kerry Ridgeway as its backbone and abuts the Shropshire Hills Area of Outstanding Natural Beauty sloping down through the Ceri and Montgomery Vales to the Severn Valley. It is bounded by the important National Trails of Glyndwyr's Way and Offa's Dyke Path and the Regionally Promoted Trails of the Kerry Ridgeway and the Severn Way allowing walkers to enjoy the breathtaking and largely unspoilt scenery.

The area is of key historic importance with, for example, the Kerry Ridgeway Drover's road, the oldest road in Wales; world renowned Kerry sheep and the first sheep fair, and the Rhydwyman Severn crossing where the English and Welsh princes signed the Treaty of Montgomery. Virtually the whole area is classified as '*outstanding*' in historical importance.

Respecting the unique past and, most importantly, valuing the future makes this an ideal area to take forward as a landscape partnership and potentially a substantial Heritage Lottery Fund bid to develop the economic, tourism and cultural potential.

CPRW Montgomeryshire are seeking tenders from experienced community development project managers to deliver to the following specification between February and June 2017.

#### **Specification for a feasibility and development study:**

- Work with partner organisations to identify their strengths, contribution, aspirations and commitment to the development of a cross-sector partnership. Their contribution to be assessed in terms of building community involvement and engagement and the



economic and educational / vocational potential of the cultural heritage and landscape of the area in promoting future sustainable rural development.

- Facilitate community consultation to raise awareness of the partnership scheme and identify the benefits the wider community would wish to see and contribute to / engage with.
- Provide a feasibility report into the viability of a Landscape Partnership Scheme (LPS) and of submitting a Stage One bid to HLF to secure funding to take forward such an initiative. This should include a detailed rationale; SWOT analysis and risk assessment; budgetary projections and analysis; project partnership proposals and any other matters in order to meet the requirements of submitting a Stage One application.

### **Outcomes**

- A full feasibility report of the potential to develop a major Partnership Scheme based on the landscape and heritage of the area and based on the requirements for a stage One HLF bid. A report on partnership development including expertise identified, organisations engaged; cross-sectoral involvement; future potential.
- An analysis of how the partnership could contribute to enhancement / better management of the natural and built heritage including sustainability, identification and recording, improved 'visibility' / accessibility and understanding by local communities and visitors.

The successful applicant will be responsible to the KHV&T Steering Group to whom they will make regular progress reports.

## List of proposed projects for an initial application in May 2017

### Trails and Transport

NRW	Circular Walks	Walks linking the perimeter of the area with existing path
Montgomery Town Council	As above	As above
MWRT	Narrowboat story.	Provide a narrowboat on the canal at Newtown
Kerry and Sarn History Group	Rivers and watercourses in history	Mills, watercourses and other features
Partners	Guided, themed walks	Understanding / reading the landscape

### The Story of Sheep

Newtown Textile Museum and Community artists	From wool to weave	Demonstrating the story, using Kerry Sheep of wool from the fleece through to garments. Using raw and made materials to create art works in communities across the area. Could link to Brynlllywarch Farm and Oriel Davies
Brynlllywarch School	Farm development	Develop the farm and its use as a community resource. Could link to the Newtown Textile one
Kerry and Sarn History Group	Dating domestic and agricultural buildings using dendrochronology	Work to identify the age and history of buildings
Kerry and Sarn History Group	Welsh field, river and farm names - what do they tell us?	Research into place names, in partnership with the Welsh Place Names Society
Kerry and Sarn History Group	History of land use in the area	Using maps and field visits to examine how land use has changed.
NPTC	Construction dept.	Offering heritage, traditional building skills
NPTC	Hospitality dept.	Linking with hospitality for training on local produce, Plot to Plate. Link with the Cultivate project or the David Jones project.

### Contested country

Kerry and Sarn History Group	Church and monastic lands	Kerry church and the Cistercian grange at Gwernygo
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## Opportunities for Wildlife

CRT	Hedgerows	Restoration of the hedgerows adjoining the canal
CUP/CPRW	Wildlife habitats network 'Pontbren 2'	Replication of the Pontbren project
SRT	River Mule Brown Trout Project	Habitat improvement to develop fishing potential
SRT	Trees in the Caebitra Catchment	Work with landowners to identify tree planting potential across their land and they pay them as contractors to undertake the work.
Partnership	Small Grants Programme	Small grant for habitat restoration for landowners/ managers
NPTC	Agriculture dept	Work on their own farm, hedgerow restoration to replace fences - involving traditional skills training

## Funding options

The alternative to approaching the identified activities and delivery as a single LPS, would be to apply for a range of smaller grant schemes. These would include grant making trusts and larger funds including those managed by the local authority and Lottery. Below are some examples:

BIG Lottery - Awards for All Awards for All offers grants of between £500 and £5,000 for grassroots and community activity that aims to improve life for local people and neighbourhoods. It doesn't have a deadline and you can apply at any time. This funding encourages a wide range of community, health, educational and environmental projects.



People and Places

People and Places will fund projects that enable people to work together for strong communities, social justice and better rural and urban environments in Wales. We want to empower local people to make their communities better places to live. £5,001 - £1,000,000 People and Places is a rolling programme – there is no closure date. We will accept applications from organisations based anywhere in the UK, but projects must mainly benefit people in Wales.



Heritage Grants

This open programme is for grants over £100,000 for any type of project related to the national, regional and local heritage of the UK. Grants of more than £100,000 – None Open grant programme, applicants can apply at any time, except for grants of £5million and over - see HLF's website for more information [www.hlf.org.uk](http://www.hlf.org.uk).



Our Heritage

This is a general programme for all types of heritage projects across the UK. £10,001 - £100,000 Rolling grant programme, applicants can apply at anytime.



Arts Grants for Organisations

Provides support for arts organisations based and primarily working in Wales. £250 - £100,000. Various - see the guidelines on our website: <http://www.artswales.org.uk/what-we-do/funding/apply/organisations>

Rural Community Development Fund

<http://gov.wales/topics/environmentcountryside/farmingandcountryside/cap/ruraldevelopment/wa>