



**Countryside**

**Training**

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# **Legacy Planning for Landscape Partnerships**

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This briefing note has been written to help Landscape Partnerships think about how they might best secure a legacy from their activities after their scheme has completed delivery. It draws on a survey of 'mature' Landscape Partnerships carried out in 2012, together with inputs from a number of colleagues who attended a seminar where findings from the survey were subjected to scrutiny.

**DISCLAIMER:** this document does not form official HLF guidance and some recommendations in this report were not taken forward as requirements for the revised Landscape Partnership programme. Whilst the considerations in this document will be very useful for schemes developing their legacy plans, please refer to the HLF website for up-to-date information and policy requirements for this grant programme.

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## Summary

### Scope, purpose and origins of this note

- HLF and the organisations involved in the delivery of the Landscape Partnership Programme would like to maximise the legacy of these schemes. This briefing note has been written to help Landscape Partnerships think about how they might best secure a legacy from their activities after their scheme has completed delivery. It draws on a survey of twelve 'mature' landscape partnerships carried out in 2012, together with inputs from a number of colleagues who attended a seminar where findings from the survey were subjected to scrutiny.

### Current practice

- Our survey revealed a body of good practice around the country which landscape partnerships in development can draw on in the future.
- The legacy from landscape partnerships is diverse, relating to the wide range of outcomes which the programme seeks to deliver.
  - \* Some elements of LP legacy relate to the landscape as a whole. These elements include, for example, the way the identity of the landscapes is reinforced, the way the culture of organisations involved has become more 'pro-heritage', the way organisations are working together more effectively, and the way schemes have sometimes kick-started other ambitious heritage activities.
  - \* The legacy from individual projects has physical manifestations (covering both built and natural heritage) and also encompasses people and community outcomes.
- The legacy of landscape partnerships is secured in a number of ways:
  - \* Further resources become available, either as the result of fund-raising or through the development of more sustainable business models.
  - \* Third parties (usually members of the partnership or newly created community based groups) take on a long term legacy role for particular elements of the scheme.
  - \* Governance arrangements are put in place to cover the whole of the LP area. It may be that the landscape partnership stays together beyond the period of HLF funding, that the partnership's lead body takes on responsibility for the scheme's legacy, or that a new Trust, social enterprise or not-for-profit company takes this on.
  - \* Legacy plans are drawn up and implemented, at either a scheme-wide or on a project-by-project basis.

## Recommendations

- Landscape partnerships should be encouraged to take an ambitious view of the legacy they might create. Legacy in this context means much more than simply providing for the maintenance of scheme outputs over a ten year period.
- Legacy should be taken into consideration at an early stage of LP development.
- A formal mid-scheme review will often provide the best time to firm up legacy ambitions and arrangements. This could involve an element of external challenge to the Partnership, networking with other schemes and the production of an agreed legacy strategy.
- One possibility would be for HLF to retain a small proportion of the partnership's HLF funding and for this sum to be made available on receipt of an acceptable legacy plan. This money would then contribute towards the development of legacy arrangements (e.g. legal costs) and / or towards a legacy management fund to be used after the scheme has completed delivery.
- The Landscape Conservation Action Plan (LCAP) should play a central role in supporting a rigorous approach to legacy planning and be seen as the basis for the legacy strategy.
- Consideration needs to be given to how organisations co-ordinating legacy work will be resourced, and to how both legacy activities and legacy condition can best be monitored.

# 1 Introduction

## Legacy and why it matters

One aspiration for anyone involved in heritage work is that their projects should result in long-lasting benefits. This ethic is at the heart of Heritage Lottery Fund's new Strategic Framework, consequently entitled "A Lasting Difference for Heritage and People". Organisations in receipt of HLF funding will typically have a corresponding interest in sustaining the legacy of their work. Many heritage projects, including those funded by HLF, benefit from funding for only a fixed period, during which time careful thought needs to be given to an appropriate exit strategy.

Legacy in this context, means the enduring benefits which result from HLF-funded activities and which continue after the landscape partnership scheme has completed delivery. Time and money invested in heritage work can be quickly dissipated unless plans are made to secure the legacy. This means for example that restored buildings need to be protected from damage or decay, habitats may need ongoing management if they are to remain in favourable condition, and individuals and groups may need support and encouragement if they are to remain engaged in heritage activities.

Safeguarding legacy has additional benefits beyond simply maximising the value obtained through HLF funds. Partnerships and individuals, especially perhaps volunteers who have special stake in what has been achieved, become disillusioned and demotivated if the results of their efforts and enterprise are seen to come to nothing. Where legacy cannot be demonstrated the reputation of funded organisations - and of HLF itself - is damaged.

## Landscape Partnership Legacy

Landscape Partnership (LP) Schemes can be more complex than other HLF programmes. The schemes are built around a number of discrete projects which address a wide range of heritage outcomes, while delivery is achieved through a partnership of different types of organisation. LP legacy is diverse: it relates both to individual projects and across the wider landscape; it will often include the impact partnership work has had on partner organisations; it may be manifest in the emergence of new types of heritage organisation.

UK landscapes are the result of thousands of year of interaction between human and natural forces. Landscape is always subject to change, and this will continue to be the case. In this context an LP scheme will only ever make a modest impact over a comparatively short period. Thinking carefully about a scheme's legacy provides an opportunity to influence future landscape change in a positive way.

Landscape Partnership staff are usually appointed on fixed term contracts and the partnerships are often wound up once the funding is used up (even though partnership working, one legacy arising from the schemes, may continue). As a result there may be no obvious central mechanism or resource to manage the legacy or to monitor the condition of the heritage after the end of the scheme.

## 2 Current approach of Landscape Partnerships to legacy issues

The survey of Landscape partnerships revealed a diverse legacy which is being, or has been, created through the LP programme, and a range of ways in which this is being secured.

Some partnerships are adopting sound practice, which will usefully inform the work of schemes which are at an earlier stage. Other partnerships have a less comprehensive approach when it comes to maintaining the legacy of their work. Previous work with landscape partnerships revealed how different they can be from one another, each operating in its own particular landscape and within a unique organisational, social and geographical context. It is probably not particularly useful to make direct comparisons between partnerships, as legacy models which work in one situation might be inappropriate in another.

### What types of legacy have Landscape Partnerships created?

#### Landscape wide legacy

Some LP legacy relates to the landscape as whole, rather than being linked to a single project. For example:

- Creation of a new or significantly reinforced identity for the area. It is to be hoped that all LPs achieve this to an extent, but a particularly significant impact can be expected in areas which were previously considered unexceptional, even by those who live there (e.g. the coalfields of 'Limestone Journeys' - LJD<sup>1</sup>)
- A changed perception about the economic spin-off which can result from heritage projects. Research into the Tweed Rivers Heritage Project (an Area Scheme<sup>2</sup> led by the Tweed Forum) suggested that every pound invested resulted in £13 benefit to the local economy
- Significant changes to the culture or approach:
  - \* of the lead body (e.g. Chichester Harbour Conservancy – another Area Scheme)
  - \* of partner organisations (e.g. the Woodland Trust through HHC; Mount Stuart Trust through BUT)
  - \* of landowners (e.g. HHC, TRE).
- Improved relations between partners, e.g. NGOs which may at other times be in competition for members, grants or in pursuit of the acquisition of particular sites (National

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<sup>1</sup> When referring to specific landscape partnerships in this documents we are using the 3-letter codes developed as part the GIS mapping project carried out for HLF in the spring of 2012. The meaning of the codes is given in the appendix to this document.

<sup>2</sup> The Area Scheme programme was the predecessor of the Landscape Partnership programme

Trust, Woodland Trust, and Wildlife Trust, HHC) or between partners and ‘regulators’ (e.g. Natural England and Lafarge, MED),

- Wider habitat connectivity as a result of improvements delivered by a number of separate habitat projects
- Works or activities undertaken originally under the LP banner which then lead on to further projects. There are some instance where these will have greater impact or be at a larger scale than the original LP work (e.g. heathland creation works by RSPB / WFR, moorland restoration works by MFF, the £6m multi-use route planned by Sustrans / MED)
- Ways of working which have utility across a wider area than the original LP, or for other landscape partnerships (e.g. community archaeology toolkit created by WFR)
- New schemes or proposals developed as result of LP activity, for example the £4m Meikle Kilmory project on Bute (BUT), and the proposal for a follow up LP on the Isle of Wight (WEW);

### Legacy of individual projects

The table below summarises the sorts of legacy arising from individual projects:

<b>Legacy</b>	<b>How it is being sustained</b> <i>The LP examples given below are not comprehensive</i>
Built features (e.g. historic buildings, drystone walls, bird hides).	Buildings taken into active use (WEW, TRE)  Owner enters into 10- year management agreement (LNP, SCF, BUT)  Property incorporated into the owner’s long term asset management plan (United Utilities / SPW).
Improved condition of archaeological sites.	Will often need ongoing management / protection (HHC, TRE).
New historical data or information e.g. community history archives, Lidar survey results, other archaeological results.	This information is made available to both specialist archaeologists and to wider interests through county Historic Environment Records and via specialist portals such as Archaeological Data Services. (WFR, HHC, DAL, SPW).
Habitat creation and restoration works (e.g. grassland, heathland, woodland, fresh and salt marshes, reedbeds, hedgerows).	Such habitats will frequently will need ongoing management, e.g. particular grazing regimes or water level management (WFR, LNP, MED, HHC, TRE).
New biological data.	Held by county record offices (HHC).
Interpretation material.	Much is web based. All LPs have set up or have plans

<b>Legacy</b>	<b>How it is being sustained</b> <i>The LP examples given below are not comprehensive</i>
	<p>to establish a legacy website</p> <p>Provision to re-print publications (LNP, HHC)</p> <p>Guide book taken up by commercial publisher (WFR)</p> <p>Repair / replace outdoor interpretive panels (LNP, HHC, DAL)</p> <p>Museum / visitor centre exhibits taken on by host organisations (SCF, SPW).</p>
Improved access routes.	<p>Rights of Way maintenance taken on by county council (as local highway authority), by parish councils (WEW), by volunteer groups (BUT) or by landowners (LNP, DAL)</p> <p>Some access works (such as stone paving) will last indefinitely with minimal or no maintenance (SPW).</p>
Training / environmental education facilities.	<p>Remain in use by partners (WEW, PUR).</p> <p>Self-funding forest schools (NER)</p>
Creating a network of schools who want to be engaged in heritage activities.	<p>The North Pennines AONB sees this network as a resource, and so will engage with them in the future (LNP).</p>
Establishing new volunteer groups, or supporting existing groups.	<p>E.g. a new river warden scheme (MED); people who had been involved in the LP went on to join Friends of North Pennines (LNP), volunteer groups on Bute (BUT), volunteers co-ordinated through the local museum (DAL), strengthened existing groups (HHC, SPW).</p>
Grazing herds.	<p>Managed by partners with a land management / nature conservation remit, e.g. wildlife trusts, National Trust (NER, HHC, TRE).</p>
Boost to the visitor economy.	<p>New tourist association (DAL).</p>
Enforcement of trespass / anti-social behaviour laws.	<p>Independent group to continue, chaired by a senior police officer (MED).</p>



## **Mechanisms used by Landscape Partnerships to secure legacy**

These fall into four principal but overlapping categories:

### **Obtaining further resources**

This is seen by some as the principal strategy to secure legacy. Can be achieved through:

- Further fundraising (HLF, other lottery, industry, other external funds)
- Creation of sustainable business models. These can either be purely commercial operations or more often some sort of not-for-profit venture, e.g. social enterprise, co-operative venture, community land trust. One way LPs support such initiatives is through the provision of an initial endowment. Some current examples include the Burngate Stone Carving Centre at PUR, and the proposal by the newly created Allen Valleys Landscape Partnership to establish a social enterprise providing a range of services including electric vehicle charging points, hire of electric bikes and yurts, and a mobile observatory
- Establishment of a management and maintenance fund to cover the 5-10 year period following scheme completion. This can be derived from HLF's standard budget heading 'Increased 10 year management and maintenance costs' and also complemented by match funding from other sources. In all cases schemes aim to use legacy funds to help lever in additional money in future years.

### **Third parties take on legacy role**

This can happen in at least three different ways:

- Partners take on responsibility for individual projects, nearly always the ones where they have taken the lead during LP delivery.
  - \* Many will involve adopting a management plan / management agreement produced as part of the work of the landscape partnership.
  - \* Formal liability agreements are often drawn up between the lead body and landowners / partners. These will generally mirror the agreements which the lead body enters into with HLF, and usually last for a 10-year period. With smaller bodies (parish councils, smaller voluntary organisations) LP's typically do not enter into an enforceable legal agreement, but instead there is an exchange of letters in which parties undertake to look after particular items.
  - \* Funds may be allocated to third parties by the LP to cover costs which are likely to be incurred after the scheme has closed.
- New (or existing) volunteer / 'Friends of' groups take on legacy responsibility (e.g. BAS created 4-5 independent groups in final year of delivery), or in some instances the group is a legacy in itself (e.g. the LNP film group)

- Third parties are tied into a legacy safeguard role through other agreements, for example under agri-environment schemes or woodland grant schemes. Compliance with these becomes the responsibility of bodies such as the Forestry Commission, Natural England, CCW or the Scottish government.

### **Ensuring suitable institutional arrangements are in place after the scheme has completed delivery**

After a scheme has closed it is of great benefit if a mechanism is created at a landscape level to:

- Be the 'ring-holder' or conscience for the landscape
- Monitor implementation of agreed management and maintenance works
- Monitor condition of the heritage
- Appoint contractors to undertake works
- Disburse funds to partners and others who are organising works themselves.

This has been achieved in a number of different ways:

- In some cases the Landscape Partnership itself continues beyond the HLF funded period, building on at least some of the LP mission. The Grow with Wyre Partnership is entering a new phase of planning and activity, funded by the Forestry Commission and Natural England (see box); Moors for the Future (an 'Area Scheme') continues to thrive and has raised more than £10m in the five years since the Scheme closed. The principal goal of the Partnerships in these two examples is to undertake new activities, rather than just to secure the legacy of works completed under HLF funding.
- Where the lead partner / accountable body for an LP has a broad landscape conservation remit safeguarding the LP legacy may be seen as part of their mission (although the reality may be that this is seen as a lower priority as new projects are taken on in years to come).  
The obvious examples falling into this category are AONB partnerships (e.g. LNP, WFR, MED), although in some instances an NGO has a relevant status or remit (e.g. BUT). Protected landscape bodies will often be working within their formal boundaries, but sometimes (where the LP area goes beyond these) have extended their horizons (e.g. N Kent Downs AONB / Valley of Visions; Dedham Vale AONB / Stour Valley).
- Part of the exit strategy for some Partnerships has been to pass on responsibility for scheme legacy to newly established bodies:
  - New community / voluntary sector organisations (e.g. the Blackdown Hills Trust at NER, the Sandstone Ridge Trust at HHC)
  - Not-for-profit company (Dalriada).

## Legacy planning

### i) Management and maintenance plans (MMPs)

Recipients of Heritage Grants who spend more than £200,000 on capital works are required to produce an MMP. The MMP guidance (2008) suggests this approach might be of interest to Landscape Partnerships (and other targeted programmes), but it is not a formal requirement. MMPs were originally conceived as a way of guaranteeing the benefits of a project on a single site in single ownership, and so the concept needs to be adapted to suit the LP context.

One third of the LPs surveyed for this report had completed or were developing MMPs, usually covering the 10-year period after closure of the scheme. Landscape Partnership MMPs produced to date have taken a number of different approaches:

- A spreadsheet detailing on a project-by-project and site-by-site basis what needs to be done where and when, what funds which have been allocated or are required, the method to be implemented and who is charged with carrying out these works (HHC)
- A detailed plan presenting on a partner-by-partner basis maintenance responsibilities and monitoring / reporting requirements. Partners submit annual reports to the legacy body, which are brought together into a single publication (DAL – see box)
- A brief summary statement about the legacy arrangements, together with commitments from the landowner and a range of partners explaining in general terms how they will contribute to legacy over the coming years (BUT).

### ii) Project legacy plans

Where there is no overall legacy plan, arrangements are often incorporated into a number of individual project plans (WFR – see box)

## Legacy Case Studies

### A. The Dalriada Landscape Partnership

***A not-for profit company delivering the Scheme's legacy with the benefit of a £250,000 legacy budget, allocated via a comprehensive Management and Maintenance Plan.***

The Dalriada Scheme, based in Argyll, was in delivery between April 2007 and September 2010. The lead body was the Dalriada Project Company, established in 2005 as a not-for-profit company with the express intention of developing, managing and delivering the landscape partnership scheme. Company directors include representatives of government agencies, the voluntary sector and the local authority.

The Scheme's legacy includes:

- An independent tourist association (<http://www.heartofargyll.com>) which has recently been awarded £150,000 follow-up funding by Creative Scotland (successor body to the Scottish Arts Council)

- A much improved 'heritage access network', now largely the responsibility of the Argyll and Bute Council access team
- A range of Interpretation boards and other outdoor signage which is being looked after by a number of different landowners including Forestry Commission Scotland, SNH and Scottish Canals (successor to British Waterways in Scotland)
- Improved Black Grouse habitat which is being maintained by Forestry Commission Scotland
- A community history archive which is being maintained by and can be accessed through the Kilmartin House Museum
- A legacy website which is being maintained by the Dalriada Project Company.

The Scheme drew up a detailed management and maintenance plan, containing not only a detailed works schedules and specifications but also clear protocols for monitoring and reporting.

The Dalriada Project Company now has the role of overseeing the Scheme's legacy. Partners are required to report on both their management activities and the results of their monitoring work each year. The Dalriada Company then pulls these reports together into an annual progress report for the whole Scheme.

Initial allocation of the management and maintenance budget:

Black grouse habitat	£3,300
Upland footpaths	£42,000
Lowland footpaths / furniture / bridge	£124,000
Interpretation panels	£12,000
Interpretation reprints	£4,000
Website	£1,000
Electronic information points	£28,000
Support for the tourist association	£3,000
Public liability Insurance	£30,000
Accountancy	£10,000
Company secretary	£12,000
Monitoring and Reporting costs	£5,000

## B. Weald Forest Ridge landscape Partnership

***A partnership operating within a protected landscape. From the outset it was agreed that legacy responsibility would lie almost entirely with partner organisations. The Scheme has developed an impressive project planning system, but has no central legacy budget.***

The Weald Forest Ridge Landscape Partnership commenced delivery in January 2009 and by the autumn of 2012 was winding down. The Scheme area is nearly all within the High Weald AONB, and the accountable body was the AONB Partnership / East Sussex County Council. The partnership team adopted a strategic role, and delivery was mostly achieved through partner organisations. The central team led on communications, promotion and partnership development.


The Scheme’s legacy includes:

- A £500,000 heathland creation project delivered by the RSPB, who will not only maintain works undertaken as part of the LP Scheme, but who also plan substantially to extend the heathland area over the coming ten years.
- Three community archaeology toolkits, which are available on-line, and a regional Archaeology Forum which will continue to develop woodland archaeology knowledge and skills across the south-east of England.
- A £100,000 Lidar survey which is accessible to all through the internet and via County HERs.
- A range of interpretive materials, both digital and hard copy

The Scheme managed this suite of outsourced projects with the help of a comprehensive project planning system. Each project implementation plan included a section on ‘sustainability and legacy’, which focussed minds on this aspect from the outset.

There is no central ‘legacy fund’ but some ongoing management and maintenance costs were built into individual project budgets and passed on to the delivery partners. There is for example a reprint budget for a set of 13 self-guided walks leaflets.

The AONB unit intends to monitor delivery of these project plans over the coming years.

Project Name		Project Code
Eridge Rocks habitat enhancements		PA18
Project Theme Code		
P1.2		
Delivery Partner		
Sussex Wildlife Trust		
Other Key Delivery Partners		
n/a		

**Project Sustainability and Maintenance of Benefits**

No.	Objective	How will the Project’s Benefits be Maintained and by Whom?	Who will Fund the Maintenance
1	To enhance the sandstone rocks through rhododendron removal	Ongoing removal until it is eliminated	Sussex Wildlife Trust funds
2	To enhance the woodland through ride widening	Ongoing work as part of SWT management plan	Sussex Wildlife Trust funds
3	To enhance public understanding of the site	Maintenance of the interpretation board	Sussex Wildlife Trust

**Project Finances**

**C. Grow with Wyre Landscape Partnership Scheme**

**Legacy arrangements at Wyre Forest are focused on a new Landscape Partnership, with an initial tranche of funding from the Forestry Commission and Natural England. The intention is to develop a new management strategy endorsed by all key players, and then to identify a long term, sustainable approach to governance.**

The accountable body for the Grow with Wyre Landscape Partnership was the Forestry Commission. The Scheme received an HLF round two award of £1.85m in September 2008 and delivery was completed early in 2012.

The Wyre Forest is the third largest area of ancient semi-natural woodland in England, but has no overall landscape designation. Prior to the establishment of the landscape partnership it appears there was little co-ordination across the area, and the lack of previous joint working has been identified as one reason why a particularly strong partnership emerged. The HLF award acted as the glue which pulled different interests together, and an important legacy of the Scheme is a much greater awareness of the value of a partnership approach.

The principal legacy ambition of the Scheme is to increase the amount of native woodland within the Wyre landscape over the next 50 years, while also developing the nature-based local economy. A major step towards this goal was taken when Natural England and the Forestry Commission agreed jointly to support a new manifestation of the landscape partnership for a further three year period, underpinned by the appointment of a strategic development manager.

The new partnership will bring together community interests with those of the statutory agencies. One community based organisation which will be closely involved will be the Wyre Community Land Trust, which has brought a number of orchards into Higher Level Stewardship and manages a grazing herd of Dexter cattle.

During years 1 and 2 the new partnership will focus on drawing up a new management plan for Wyre Forest. This will be a strategic document following the sort of approach adopted by national park plans and AONB management plans. A key part of the planning process will be to identify long term and financially sustainable governance options for the area.



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This post is being funded jointly by Natural England and the Forestry Commission, with the Forestry Commission acting as employer on behalf of the Wyre Landscape Partnership.

### 3 Recommendations

#### An ambitious view of legacy

Through the Landscape Partnership Programme significant funding is allocated to particular landscapes. To capitalise on this investment the projects included in each scheme and the legacy we seek to create should be built around an overall vision for that landscape. Where this approach has been followed it can be demonstrated that the totality of the scheme is greater than the sum of its individual projects. If there is no overall landscape vision the result can be a set of unrelated and perhaps ephemeral projects.

Beneficiaries of HLF funding sign up to various obligations over a ten-year period. This is a useful starting point, but may result in only a medium-term view of the legacy created by landscape partnerships. What is required is a more expansive view of legacy:

#### HLF funding should be seen as just a starting point

Some of the mature landscape partnerships view their award from HLF as just one step in looking after their particular landscape, and from the outset they were seeking to establish mechanisms which would sustain landscape distinctiveness in the long term. This is a philosophy which needs to be embedded in the philosophy of new landscapes partnerships.

#### The European Landscape Convention (ELC)

The ELC focuses on the protection, management and planning of all landscapes. Signatories also sign up to goal of raising landscape awareness, understanding and involvement. One conclusion of the Landscape Partnership Programme evaluation carried out in 2011 was that the LP Programme is contributing significantly to the UK's commitment to implementation of the ELC.

HLF's recently published "Landscape Conservation Action Plan Guidance" suggest that landscape partnership should use the ELC as a concept which will underpin their scheme.

For some LP outcomes we should be thinking of our legacy lasting indefinitely. Two examples:

- Habitat management.

Given the twin challenges of highly fragmented habitats across much of the UK together with the need to adapt to a rapidly changing climate, there is much to be said for the philosophy of RSPB's Futurescapes programme:

"This is a multi-decade programme; a three-year or even a ten-year spike in activity would be of limited use. To reverse the habitat fragmentation which has occurred over the last 40 or 50 years will take us a very long time"

- Institutional and financial arrangements.

One of the goals of the European Landscape Convention is that we should manage landscapes across Europe in ways which value and conserve local identity. That will never happen if we rely only on short term programmes and our ability continually to raise more funds. Legacy considerations for LPs should therefore include:

- How organisations might move from a grant-led culture to more sustainable forms of funding (sustainable business models, identifying how payment for ecosystem services can support landscape management, funding linked to other major programmes such as the Water Framework Directive or the Common Agricultural Policy)
- How to establish effective, locally based institutions (partnerships, trusts etc.) which will retain a long term responsibility for a particular landscape.

Management planners have long recognised that we need firstly to identify the enduring significance of heritage, and only then to undertake activities over a fixed time which help secure that significance. The same applies in legacy planning: the ten year agreements are subordinate to a long term legacy vision, and are of limited value unless they contribute to that vision.

## **Mechanisms to support legacy planning**

### **Think about legacy early on**

Experience suggests that landscape partnerships should start to identify their broad legacy aspirations and opportunities at an early stage. The legacy which a scheme might achieve should be a significant criterion when HLF assesses an LP proposal. Round one LP applicants should:

- Think about the wider landscape / institutional legacy their scheme might deliver, rather than seeing the partnership as a short term initiative (or even more cynically a way of securing HLF funds to deliver their own projects)
- Identify the legacy which might result from individual projects. Experience suggests that initially it may be most useful to focus on a few large legacy projects rather than trying artificially to show there will necessarily be a legacy from all scheme activities.

As an example of how this thinking might play out in practice, one way of embracing the Futurescapes' philosophy outlined above would be that applicants' habitat management / restoration works should take into account the 30-50 year legacy they might create, meaning they should:

- Consider the UKCIP / UK Climate Projections scenarios for climate and sea level in their area over that time period, and
- in the light of those projections identify target habitats likely to be resilient under different scenarios.



## **A legacy review process midway through delivery**

The bulk of detailed legacy planning will need to be undertaken when the scheme is half / two-thirds of the way through delivery. By then:

- The partnership will have a much better idea of what the scheme will achieve. On the one hand some projects might have proved impossible to deliver (WEW), while on the other significant new works may have been taken on (WEW, HHC)
- The social / institutional context may have changed. People may, as a result of LP activities, be creating a viable Trust or social enterprise to an extent not anticipated at the outset (NER)
- The wider political context may also have changed. An example of this is that Defra made it very clear following the 2010 election that its Arms Length Bodies must work more closely together. This may well have helped secure the joint NE / FC initiative at WYR.

The legacy review process could include:

- Collection of mid-term output data, under the system used in January 2009 and January 2011
- Networking events to 'up the game' across all partnerships. Colleagues involved in landscape partnership work are unanimous in their enthusiasm for events such as the workshops on LCAP production which are organised for those in receipt of a Round One pass. As well as sharing intelligence between partnerships, the agenda could include advice on different legacy governance models, which many find confusing. Two national workshops could be convened annually, which could jointly accommodate the twelve or so partnerships which reach mid-delivery each year
- An element of external scrutiny. One way of delivering this would be to re-organise the way the evaluation budget is spent. At present schemes commission an external terminal evaluation, typically costing between £8,000 - £15,000. This budget might be better spent if it were spread across both a formative evaluation at mid-delivery and a subsequent summative end-of-scheme evaluation. There would be economies of scale if the same company / individual was involved in both evaluations. The South Pennines Watershed LP commissioned a mid-way evaluation at the end of 2011, in the light of which they the partnership is now developing its legacy plan.

## **A legacy strategy**

The principal outcome of a mid-delivery legacy review would be an agreed legacy strategy. This would be broader in scope than is generally the case with a management and maintenance plan, which is often seen primarily to be about how money can best be spent.

The legacy strategy would build on the scheme's LCAP (or its constituent project plans) and could:

- Revisit the broad brush legacy aspirations identified at the outset, at both a landscape and a project level
- Identify actions required and resources needed at this stage to embed legacy arrangements (e.g. support for new institutional arrangements, consideration of how works and activities might be funded)
- Identify actions which will be required / agents who will deliver once the delivery period is completed
- Act as a public declaration by partners of their intent to support the scheme's legacy arrangements
- Establish long term monitoring systems, which would cover both heritage condition and implementation of the strategy.

The legacy strategy would need to be more flexible than the LCAP, not least so resources can be diverted to where they are most needed. Those charged with oversight of the scheme's legacy would need to respond to changes in heritage condition, to changing priorities and opportunities, and to the resources available to them. In some instances the strategy in itself will be quite light touch, especially when elements of the legacy are absorbed into another delivery plan.

Some of the options within the strategy would need to be of a 'sweeping up' nature. If, for example, interpretive panels have deteriorated, the action could be repair and reinstatement, or it could be removal. Leaving battered and illegible panels in place is the worst option.

### **Redistribute funding to support legacy**

There is some confusion as to how or whether schemes can set up a legacy fund. One clearer system which might encourage better legacy planning would be if a proportion of a Landscape Partnership award was retained to support legacy activities.

A scheme awarded £2m might under such a system be allocated £1.9m as its round two award, with a small percentage of this ring-fenced for the partnership to spend on legacy development work, such as the legal expenses incurred in the establishment of a new Trust, or to set up management agreements.

These legacy funds would only be released on receipt of a robust legacy strategy as described above.

### **Issues**

A number of issues were raised in the course of this research, which may merit further consideration:

### Capacity to deliver legacy work

- Generally there will be a marked reduction in activity / resource when the LP scheme closes. Successor trusts etc. often will not have dedicated staff, and partner organisations may become focussed on new activities which are not necessarily closely aligned with those previously delivered by the LP.
- It has been shown that it is useful if one or two staff remain in post after the end of the scheme, or if the lead or other partner organisation can retain key personnel in other roles which allow them to maintain an overview of LP legacy.
- A legacy strategy needs to be carefully worded to avoid scaring people off. Some partners might be discouraged from getting involved if they thought they had to make long term (10+ year) commitments to ongoing funding.
- Having a legacy fund means there has to be a mechanism to manage it, and that mechanism may need to be resourced.

### Monitoring legacy

- Monitoring legacy and compliance with agreed actions is often weak.
- HLF staff do not generally have the time to take on a 'mystery shopper' role, and in any event the benefits of such interventions might not justify the costs.
- A structured legacy review, perhaps seven years after a scheme has completed delivery, might be incorporated into ongoing engagement with HLF's principal partner organisations.
- Bodies such as Natural England, the Forestry Commission, CCW and SNH have a statutory duty to monitor how the grants they have disbursed are spent, while (for example) English Heritage carry out field monument inspections on a regular basis. There would be benefits if HLF were able to link its monitoring work into such systems.

## 4 Appendix

### Appendix 1: Partnerships from the survey with management and maintenance plans / post scheme budgets

Partnership	MMP	Legacy fund *	As % of gross budget
Dalriada	Yes	£250,000	8%
Discover Bute	Yes	£50,000	3%
Habitats and Hillforts	Yes	£60,000	2.8%
Living North Pennines	No	No	
Neroche	No	£80,000	c. 4%
Scapa Flow	No	No	
South Pennines Watershed	Yes	No	
Trent Vale	No	No	
Valley of Visions	No	Not as such	
Weald Forest Ridge	No	No	
West Wight LP	No	No	

\* figures for a 'legacy fund' do not include match funding / contributions in kind which in some instances are considerable.

### Appendix 2: Acknowledgements

My thanks as always to Richard Clarke who has commented on a number of drafts of this document.

#### **Other People who have provided information which has informed this report**

##### Managers of Landscape Partnerships or their legacy bodies

Will Self	Dalriada	DAL
Bridget Paterson	Discover Bute	BUT
Ellie Morris	Habitats & Hillforts	HHC
Jon Charlton	Living North Pennines	LNP
Chris Dean	Moors for the Future	MFF
Gavin Saunders	Neroche	NER
Julian Branscombe	Scapa Flow	SCF
Robin Gray	South Pennines Watershed	SPW
Virginia Green	Trent Vale	TRE
Rick Bayne	'Valley of Vision'	MED
Simon Aguss	Weald Forest Ridge	WFR
Peter Fellows	West Wight Landscape Partnership	WEW

HLF monitors / expert advisers

Adrian Phillips  
Fiona Southern  
Mike Harding  
Simon Lees

Other interviewees

David West	Forestry Commission
Brian McDonald	Natural England (Nature Improvement Areas)
Aidan Lonergan	RSPB (Futurescapes)
Paul Wilkinson	The Wildlife Trusts (Living Landscapes)
Simon Pepper	HLF Scotland Committee
Chris Spray	UNESCO Centre for Water Law, Policy and Science, University of Dundee

Other Landscape Partnerships / Area Schemes mentioned in the report

Bassenthwaite	BAS
Grow with Wyre	WYR
Limestone Journeys	LJD
Purbeck Keystone Project	PUR
Rhythms of the Tide (Chichester Harbour)	CHI