

Report to	Governance Committee
Date	21 February 2017
By	Performance and Projects Manager
Title of Report	Project Evaluation Report

Recommendation: The Committee is recommended to

- 1) Receive the project evaluations**
- 2) Agree if it wishes to make recommendations to officers as a result of the learning from the evaluations**
- 3) Agree learning to be added to the improvement plan**

1. Summary and Background

- 1.1 This report presents a number of project evaluations for consideration by the Governance Committee. The Committee is asked to consider the evaluation reports and identify any recommendations it may wish to make as a result of the learning points and themes highlighted. The Committee is also asked to agree the corporate learning to be added to the improvement plan.
- 1.2 This report contains 2 evaluation reports.

2. Steyning Dukes Project

- 2.1 This project restored, expanded and reconnected patches of fragmented and declining Chalk Downland habitat near Steyning, to benefit the rare Duke of Burgundy butterfly and other wildlife. Chalk Downland is a national priority habitat, and is the defining feature of the South Downs National Park.
- 2.2 The total cost of the project was £56,800 the South Downs National Park Authority (SDNPA) contributed £4,498 from the Grassroots Fund and £2,100, in in-kind match funding. The rest of the funding was provided by a Heritage Lottery Fund contribution of £28,000 and £24,300 in-kind support from partners.
- 2.3 The project represented good value for money as the SDNPA contributed 12% of the project cost. This is a ratio of £1 of SDNPA funding to £8 of funding from other sources. The volunteers recruited will be available after the project to continue annual surveys and habitat work. Data from the project is contributing to regional trend monitoring. The major achievement has been that a small community group established around the project has submitted its own application to take forward awareness and education locally. The evaluation report is at **Appendix I**.

3. Hampshire Historic Landscapes Study

- 3.1 The Hampshire Historic Landscapes Study (HHLS) identifies the surviving historic features in the landscape to inform management and decision making. This work was required as the existing historic Landscape Character Assessment for Hampshire was an early pilot and did not match the methodology for Sussex and makes the studies across the National Park incompatible with each other.
- 3.2 The cost of the study was £28,050. The delays to the project did not have any impact on the overall cost. Given the need for the Study and the excellent quality of the work produced, the project is considered to be good value for money, despite the delays in delivery of the

final study.

3.3 The evaluation report is at **Appendix 2**.

4. Corporate learning

4.1 The corporate learning from the evaluations will be pulled together and added to the improvement plan as appropriate. The main recommendation for corporate learning comes from the HHLS project. The recommendation is that there is recognition in our tendering process of the risks around using sole traders. The Committee is asked to agree the additional improvement activities for inclusion in the improvement plan as set out in **Appendix 3**.

5. Policy and Programme Committee considerations

5.1 The South Downs Way Ahead, Nature Improvement Area project started in 2012 and an update on the achievements of that project was taken to the Governance Committee in September 2015. Elements of the approach developed as part of that project formed the basis for the Steyning Dukes project.

6. Other Implications

Implication	Yes*/No
Will further decisions be required by another committee/full authority?	No
Does the proposal raise any Resource implications?	Not in itself although the value for money of the projects themselves are reported as part of the evaluations.
How does the proposal represent Value for Money?	Each project is assessed separately for value for money. Overall the projects evaluated did represent either appropriate or good value for money.
Are there any Social Value implications arising from the proposal?	No
Has due regard has been taken of the South Downs National Park Authority's equality duty as contained within the Equality Act 2010?	Any such considerations are taken into account in the developments of the projects themselves.
Are there any Human Rights implications arising from the proposal?	No
Are there any Crime & Disorder implications arising from the proposal?	No
Are there any Health & Safety implications arising from the proposal?	No
Are there any Sustainability implications based on the 5 principles set out in the SDNPA Sustainability Strategy:	Learning from projects contributes to sustainability principle 2 ensuring a strong healthy and just society – considering social cohesion and wellbeing; principle 3 achieving a sustainable economy – considering impacts on or contribution to a sustainable economy; and principle 4 Promoting good governance – considering how to encourage active participation.

7. Risks Associated with the Proposed Decision

Risk	Likelihood	Impact	Mitigation
That learning from projects is not fully captured	2	2	Well understood mechanisms are in place to capture information about the progress of projects and identifying learning through evaluation. Evaluation reports and case studies are routinely produced.
Learning from projects is not fed into future project development	3	2	Improvement planning is in place but there is potential to review and improve how this takes place. Project specific learning is followed up by themed programme boards which meet several times a year. Corporate learning is beginning to be captured and disseminated in a more comprehensive way via a revised improvement plan and in any revisions to guidance that might be deemed appropriate.

ANNE REHILL PERFORMANCE AND PROJECTS MANAGER South Downs National Park Authority

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Appendices

1. Steyning Dukes
2. Hampshire Historic Landscapes Study
3. Learning to be added to the corporate improvement plan

SDNPA Consultees: Chief Executive; Director of Strategy & Partnerships; Director of Planning; Directory of Operations; Director of Corporate Services; Chief Finance Officer; Monitoring Officer; Legal Services, Governance and Support Services Manager

External Consultees: Report authors for the evaluations consulted SDNPA staff during the development of their evaluation reports.

Background Documents: [Update report on the NIA project](#)



End of project evaluation report of The Steyning Dukes Project

Author: Tom Parry

Date: 18/01/2017

Project Lead: Tom Parry

Executive summary

This project restored, expanded and reconnected patches of fragmented and declining chalk downland habitat near Steyning, to benefit the rare Duke of Burgundy butterfly and other wildlife. Chalk downland is a national priority habitat and is the defining feature of the South Downs National Park.

The project area sits within the South Downs National Park, and chalk downland has been identified as a priority habitat in the South Downs National Park Partnership Management Plan. Designation alone will not conserve this special habitat, active and appropriate conservation action must be taken to prevent further fragmentation and species loss.

Key project outputs:

- Recruitment of more than 100 volunteers to carry out habitat work, and biodiversity surveys in the area.
- The establishment of a bespoke conservation grazing scheme with trained volunteer lookers.
- The development of a youth steering group to assist in the continued management of the site.
- Building local capacity within partners to take the lead on developing new projects.

The shortcomings of the project, namely the lack of youth engagement is being addressed both through the development of the youth steering group and the development of a follow on project that is led by the Steyning Downland Scheme (SDS), and will focus on working with local schools to bring 'down to town' through the creation of butterfly reserves in school grounds. Thereby creating and reinforcing the link with the downland on the doorstep of many young people in and around Steyning.

The project

Chalk downland sites have great landscape, biodiversity, cultural heritage and access value but are suffering badly from loss, fragmentation and degradation.

Chalk downland has been identified as a priority habitat in the South Downs National Park Partnership Management Plan, however designation alone will not conserve this special habitat, active and appropriate conservation action must be taken to prevent further fragmentation and species loss.

One such species that has suffered significant decline since the 1950's is the Duke of Burgundy Butterfly, one of the UK's rarest and most threatened species. In Sussex only a few colonies remain, although progress has been made at some sites following targeted conservation efforts for example, Butterfly Conservation's 'Dukes on the Edge' project. Habitat loss and deterioration are the main causes of decline, not only for the Duke of Burgundy, many chalk downland invertebrates such as the small blue butterfly, also continue to decline.

Our changing society and economy has meant that management of many chalk downland sites are currently not economically profitable and many of the values provided by chalk downland sites such as access and

recreation are not measured or taken into account. Consequently much of the chalk downland habitat in the project area is in poor condition and is continuing to decline.

The South Downs National Park is the most highly populated and visited national park in the UK. Chalk downland sites here are particularly important for their access and recreational value. Part of the South Downs National Park was selected as a Nature Improvement Area (NIA) in 2012. The vision of the South Downs Way Ahead NIA was to restore, expand and reconnect chalk grassland habitat across the National Park; our project will help to make this vision a reality and will complement other chalk grassland work in the Park.

The South Downs Way Ahead Partnership undertook a range of stakeholder engagement work (including events and online questionnaires), which clearly demonstrated the need for this project and strong local support. Local people responded that they wanted local chalk downland sites to be more effectively managed, restored and reconnected; this engagement work helped to shape the project aims and activities.

The project aimed to restore, expand and reconnect patches of fragmented and declining chalk downland habitat near Steyning, to benefit the rare Duke of Burgundy butterfly and other wildlife, and to educate local site users about the heritage; thereby developing a greater understanding and appreciation of local chalk downland habitat and biodiversity, engaging the local community in conserving the landscape for future generations. Key project activities included:

1. The creation of 28ha of suitable habitat for the Duke of Burgundy butterfly in the project area, helping to secure the future and range expansions expected of this beautiful butterfly in the South Downs.
2. Collaborative work with the SDS, the Wiston Estate, Neil Hulme (South Downs butterfly consultant), and the local community to ensure that the chalk downland heritage of the project site was enhanced and sustainably managed for the future.
3. The delivery of workshops on relevant land management skills for example coppicing, scrub clearance and shepherding/stock management for community groups, volunteers, landowners and managers, thereby helping to ensure the long term sustainable management of the area and continuation of activities beyond the life of the project.
4. The capture of a large amount of baseline data, focusing on target chalk downland species such as Duke of Burgundy butterfly, archaeological assets and European protected species within the project area that contributed to a more detailed picture of the heritage, further informing land management practice now and into the future.
5. Training volunteers in chalk downland species identification (particularly butterflies), survey techniques, practical habitat management and guided walk leaders.

Key findings and recommendations

Landscape and Biodiversity

The project has fully delivered, if not over delivered in terms of its landscape and biodiversity targets. Arguably the biggest success of the project has been the creation of new, and the enhancement of, existing areas of chalk downland within the project area.

This has been down to a combination of scrub management through mechanical methods using paid contractors and the efforts of an army of conservation volunteers.

The quantity of biodiversity data collected has been immense and is currently being entered into a database, ready for analysis with the following years. Although too early to identify trends or use the data to inform management decisions, anecdotal comments about the condition of the habitat by the projects' butterfly expert are encouraging.

The aim of this project was never to have the Duke of Burgundy on site at its cessation but rather to have habitat in a condition that is capable of supporting a population, as the butterfly spreads east. This could in fact be happening far quicker than anyone predicted, with the Duke of Burgundy being seen just 4km from the project area, as a result of work carried out through a preceding Duke of Burgundy project further to the west. Highlighting the value and forward thinking nature of the project.

Creating the habitat has arguably been the easy part.; the continued maintenance is where difficulties are often encountered. Taking this into consideration, one of the biggest successes of this project is the establishment and implementation of a suitable and sustainable grazing regime and associated infrastructure. This development has cemented the security and longevity of the benefits to biodiversity brought about by the project.

Volunteers and Community

The inclusion of a volunteer co-ordinator post has been vital to the successful recruitment, organisation and training of volunteers for this project. Without this post it would have been very difficult to obtain and keep the number and quality of volunteers that are evident in this project. It must also be recognised that the contributions of experts, in terms of advice and training, has far outstripped that which they were paid for. Although a strength in this instance it should not be taken for granted in future projects and could very easily become a significant weakness should experts not be so willing and enthused to give some of their own unpaid time to help further the project.

A by-product has been the increased publicity and local knowledge about both the project and the wider ongoing management of the area. This increase in local awareness, achieved through dedicated information events and other public events, has meant the number of volunteers giving their time to the project has far outstripped that originally predicted. It has also lead to individuals with no conservation interest coming forward and offering their time, to help with office admin for example.

The aforementioned grazing regime has also lead to the formation of a group of volunteers known as lookerers. These volunteers are responsible for inspecting the livestock daily and informing the grazier of any problems. An offshoot of this has resulted in the creation of 'superlookerers'. These individuals are being trained by the grazier to have a more in depth knowledge of livestock, including condition scoring and bucket training the animals.

One aspect that was overlooked during the project, were those groups that would not normally attend information evenings about conservation, young people for example. In an attempt to address this shortcoming the project steering group has been working with a local youth worker to develop a youth steering group, which will feed into the projects ongoing management and issues affecting young people.

Governance and Project Management

All primary purposes of the project have been achieved and some exceptionally so. It could therefore be argued that project management and governance were efficient and fit for purpose. However, despite there being a suitable reporting and decision making framework in place, there were times when things slipped, the change in project end date and movement of funds during the project for example.

This is primarily down to the fact that the day to day running of the wider Steyning Downland Scheme is done through a steering group that, while informed of this project, is on the whole separate and has a much larger remit. This led to issues relating to the project perhaps not having sufficient time allocated to them meaning that it was not possible to drill down to the crux of the issue. As a result things may have been less efficiently dealt with.

The reporting procedure between the secondary partner, carrying out much of the work on the ground, and the lead partner was lacking. Leading to a difficulty in assimilating and centralising information.

Partnership Working

This project had a number of very different disciplines, from the science of seed collection and propagation, to the intricacies of public engagement and volunteer recruitment. On this occasion disciplines complimented each other fantastically and each organisation seemed to mesh seamlessly with one another to fulfil project objectives.

An example of this is when we combine Kew at Wakehurst specialist seed collection and propagation knowledge to collect and grow *Primulus spp* seed, with butterfly consultant Neil Hulme's ability to identify the perfect aspect, location and surrounding vegetation for the resulting seedlings that were grown by Steyning horticultural society and planted by the SDS and SDNPA volunteers, to culminate in the creation of the perfect growth form of *Primulus spp* to attract the extremely fussy Duke of Burgundy butterfly to lay eggs on the plants!

The success of these partnerships has now given a small community run charity the confidence and capacity to submit and lead on a new project, working with local schools to help increase the habitat in and around Steyning for blue butterflies. The SDNPA are an integral partner in this project but this time will be taking a supporting rather than lead role, freeing up staff time and resources to assist other community lead groups that may have the ability but lack the confidence to carry out similar projects.

Sustainability

As previously mentioned the main driver for the retention and improvement of the project outcomes, at a biodiversity level, is the continuation of the grazing regime. This is set to carry on as long as all parties are happy to do so, which is aided by the good personal relationships of those involved and the willingness on all sides to do what is best for the habitat.

The huge number of volunteers recruited for this project has been assimilated into the SDS and will continue to carry out the work including habitat restoration, lookering and annual biodiversity surveys. The administration and co-ordination of these volunteers has been taken on by the Steyning Downland Scheme. The enthusiasm and commitment of partners, and the willingness to give up their time for the scheme, allows the continued training and recruitment of new volunteers to continue on an annual basis.

It has been recognised that the wave of local enthusiasm for the surrounding downland and associated species, brought about through this project, must be capitalised upon. This is being done by recognising and addressing a short fall of this project, to engage with young people. By utilising links with local schools, and the creation of a new project bid to compliment and improve on the work done in this project, it is hoped that the wave of enthusiasm will spread to the schools of Steyning and leave with the pupils as they continue onto adulthood.

Value for money

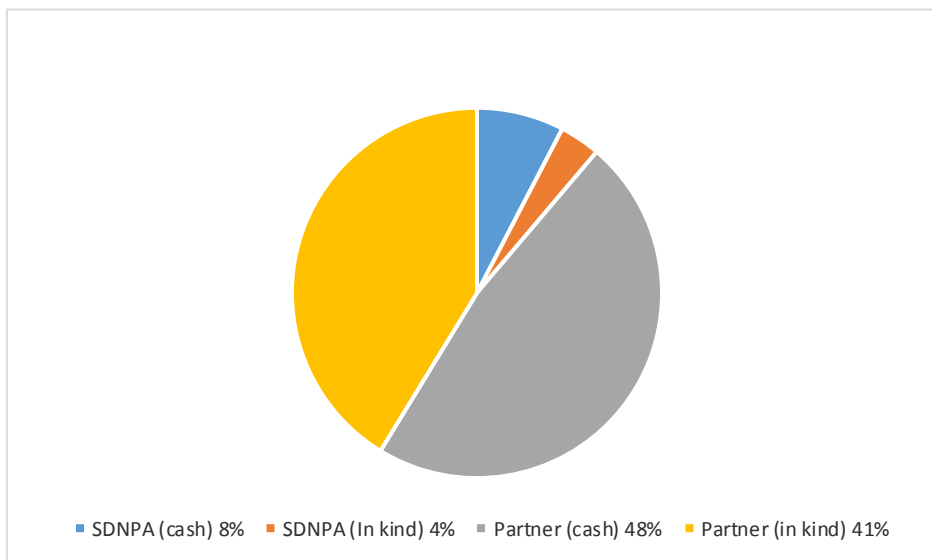
This project has achieved fantastic value for money, and represents an efficient and effective way for the SDNPA to utilise resources, both cash and officer time, to achieve park purposes and duties. Examples to support this statement are set out below.

- SDNPA contributed to 12% total project costs, meaning that every £1 of SDNPA funding was matched by more than £8 of partner funding.
- The volunteer resource recruited through this project will continue to carry out annual surveys and habitat restoration work, most probably for the life of the SDS.
- The data collected from these surveys is being entered onto a database and can be used to help monitor the regional trend of butterfly populations across this part of the South East.
- A small community charity has developed the confidence and capacity to develop and submit their own project, in partnership with us, to further increase awareness and education about the downland around Steyning.

Table 1: Breakdown of costs and project outputs.

In kind (£)	£24,300
Cash SDNPA (£)	£4,498
HLF contribution (£)	£28,000
SDNPA officer time (£)	£2,100
Public engagement (People)	~1445
Volunteers recruited (People)	106*
% officer time to total cash and match**	4%

Fig 1: Project funding broken down by organisation and cash to in kind (%).



NB: All values are for life of project.

* Directly as part of project, therefore only surveyors and seed growers, does not include additional influx as result of increased awareness of project i.e. conservation volunteers, lookers and office/admin volunteers.

** Not including SDNPA contribution from grassroots fund

Management Response

This has clearly been a very successful project, showing good value for money, exemplary joint work with partners and meeting many of the PMP priorities. Community development is ongoing and flourishing and has led to a follow-on bid, which the SDNPA is pleased to be able to support.

We look forward to the Duke moving in

Appendix I

Approved Purposes	Summary of Progress
Undertake species monitoring work including a baseline survey to compare data across the project.	Base line data has been collected and butterfly transect routes have been created by Neil Hulme butterfly consultant. These routes are now being walked at least once a month May-September by 25 volunteers.
Work to improve the chalk downland habitat based on areas identified in the project application, to include the restoration of approximately 20.5ha and re-creation of 7.5ha of chalk downland.	Volunteers have worked on 13ha of exsiting Chalk downland, helping to restore it to good quality habitat. Contractors have carried out specialist work on 5ha of exsiting chalk grassland.
Recruit a part-time Project Volunteer Officer and extend the role and hours of an existing member of staff to act as Project Manager.	Officer Recruited September 2014
Recruit 50 volunteers and provide training in survey methodology and species identification and monitoring. Provide further training in the skills required to undertake chalk downland restoration skills.	Currently 63 vounteers recruited and 3 training days held attended by over 60 volunteers
Create interpretation and participation materials including content for the Internet to be hosted on partner websites.	Volunteer project Officer had appearance on BBC Radio Sussex to promote the project, as well as several articles in local newspapers. The current Steyning Downland Scheme Website is undergoing a makeover that will include a page on the Steyning Dukes Project. Facebook and Twitter are also being used to promote the project and associated training workshops and informatione events. Specially made Duke of Burgundy Pin Badges have also been made to celebrate the poject and have been on sale at information events.
Host events including information/open days for project participants and local people. Offer additional training workshops in land management for the wider community.	5 information events held with over 100 members of the public attending.

<p>Undertake species monitoring work including a baseline survey to compare data across the project.</p>	<p>Butterfly transect routes have continued to be walked at least once a month May-September by 25 volunteers. The baseline data has been entered into a database, and this year's data has been submitted to the schemes butterfly consultant and a volunteer, to be entered onto said database. This process will continue annually for the foreseeable future. This will allow for comparisons, and trends in butterfly populations to be observed over the years and management of the site adapted accordingly.</p>
<p>Work to improve the chalk downland habitat based on areas identified in the project application, to include the restoration of approximately 20.5ha and re-creation of 7.5ha of chalk downland.</p>	<p>Volunteers have worked on 23.5ha of existing chalk grassland to restore it to good quality habitat. Contractors have worked on a further 3ha of chalk grassland. 300 local school children have been involved in the creation of 3ha of newly created chalk grassland.</p>
<p>Recruit a part-time Project Volunteer Officer and extend the role and hours of an existing member of staff to act as Project Manager.</p>	<p>N/A see previous report</p>
<p>Recruit 50 volunteers and provide training in survey methodology and species identification and monitoring. Provide further training in the skills required to undertake chalk downland restoration skills.</p>	<p>Currently 81 volunteers recruited and 7 training days held on butterfly monitoring, seed collection, seed propagation and chalk grassland management. Attended by more than 70 volunteers.</p>
<p>Create interpretation and participation materials including content for the Internet to be hosted on partner websites.</p>	<p>Interpretation panels created for strategic points on site, and course material created for training days, as well as guides for surveyors, and seed propagators.</p>
<p>Host events including information/open days for project participants and local people. Offer additional training workshops in land management for the wider community.</p>	<p>Community feedback event held, updating local people on the progress of the project. Attended by 45 people. Annual Big Picnic event held, attended by 500+ people. Although not a project specific event it was an opportunity to promote the project and recruit volunteers. A trip to the Millennium Seed Bank Kew, at Wakehurst place also held, to look at seed collection and propagation techniques. Trip to Heyshott Down, a current Duke of Burgundy stronghold, carried out by butterfly consultant. To allow potential volunteers to see first-hand what prime Duke habitat and the butterfly themselves look like.</p>

Appendix 2

Please insert the evaluation follow-up plan for the implementation of recommendations (a template is available on the intranet).

SDNPA Evaluation Follow-up plan for the implementation of Recommendations								
Recommendation	Project Specific OR Corporate applicability	Management Response (accept/partially accept/not accept)	Comments (if not accepted please provide reason/explanation)	Follow-up Actions	Responsible person	Start date	End date	Status of implementation
Develop clear reporting procedure between lead and partner organisations.	Project	Accept	SDNPA guidance now available but was in early stages of development at time of project commencement.	Closer links with lead applicant and project team at early stages of project.				
Have regard to evaluation process as project progresses and ensure all relevant individuals aware.	Project	Accept	SDNPA guidance now available but was in early stages of development at time of project commencement.	Closer links with lead applicant and project team at early stages of project.				
External promotion of SDNPA's role in project could have been more prevalent. Develop communications plan, to promote project prior to approval.	Project	Accept	SDNPA guidance now available but was in early stages of development at time of project commencement.	Closer links with lead applicant and project team at early stages of project.				

Recommendation	Project Specific OR Corporate applicability	Management Response (accept/partially accept/not accept)	Comments (if not accepted please provide reason/explanation)	Follow-up Actions	Responsible person	Start date	End date	Status of implementation
<p>Having an external partner that is capable and willing to take on and continue with much of the work done by the project, ensures legacy. Therefore essential to have this in agreement before projects commence, or have clear exit strategy with no loose ends at cessation of project.</p>	<p>Corporate</p>	<p>Accept</p>	<p>Exit strategies are written into PID's, but occasionally projects leave resource hungry legacies that divert staff from core work.</p>	<p>Identification of organisation to continue project legacies identified in the PID. If SDNPA some form of organisational resilience test developed, and regard given, not only to resource implications during project, but also post project.</p>				
<p>Having a dedicated volunteer officer was a great asset to the project. Consideration given to efficiencies of new post vs existing staff and backfilling.</p>	<p>Corporate</p>	<p>Accept</p>		<p>Some form of resilience test pre-project approval, would be useful to ascertain most efficient method for managing elements of or whole project.</p>				



End of project evaluation report Hampshire Historic Landscape Characterisation

Author: Anne Bone

Date: 30th December 2016

Project Lead: Anne Bone

Executive summary

Historic Landscape Characterisation (HLC) identifies the surviving historic features in the landscape to inform management and decision making for this part of the cultural heritage of the National Park. This work was required because the SDNP is covered by the two HLC studies, Hampshire and Sussex. The existing Historic Landscape Character Assessment for Hampshire was an early pilot study (in 2000) and so lacks the use of the improved methodology used in the Sussex HLC. Development pressure in the Hampshire part of the National Park, especially around Petersfield, highlighted the difference in functionality and quality of the two county HLC data sets and evidenced the need for this work to be undertaken by suitably experienced consultants.

In July 2014 Wyvern Heritage was appointed as the clearly preferred candidate (some 10% higher marks than the second choice) and they had a positive reference from English Heritage. The appointed consultant soon proved to be technically very competent.

Two periods of illness suffered by the consultant resulted in a major impact on the programme so that delivery has been concluded in January 2017 instead of September 2015; the project team and internal project manager took the view that the work of the consultant was of a high quality and it would have taken any other consultant a significant amount of time to get up to speed on the work in a significant time delay.

A high quality final report was received in January 2017 and the work will not require repeating unless or until there is a major and radical change in the national standards for this type of work. The project budget was set at £29,000 and the successful tenderer submitted a price of £28,050 which has not been exceeded. The total cost has been borne by SDNPA, partly from the Local Plan Evidence budget, was assessed as providing good value for money.

There is always a risk in appointing a sole trader consultant and this was recognised but neither should this prevent the best tenderer being appointed. The learning from this piece of work is to explore with a sole trader at interview stage or preferred supplier meeting to explore their planning for any delay due to ill-health, loss of equipment or other issues to reassure the client before appointing a sole trader.

The project

Historic Landscape Characterisation (HLC) identifies the surviving historic features in the landscape to inform management and decision making for this part of the cultural heritage of the National Park. This work was required because the SDNP is covered by the two HLC studies, Hampshire and Sussex. The existing Historic Landscape Character Assessment for Hampshire was an early pilot study (in 2000) and so lacks the use of the improved methodology used in the Sussex HLC. The county boundaries are to some extent artificial when working at a National Park scale and so the difference in the HLCs' content and their ability to be expressed in GIS is a hindrance to the work of the National Park Authority in managing the landscape with partners and in its role as the local planning authority. Having one integrated data set would improve our work in delivery of the policies of the Partnership Management Plan, and inform the development of partnership projects in the two study areas. It would also contribute to the evidence base for the Local Plan and inform the development of Plan policies and be evidence for the consideration of individual development management cases. Development pressure in the Hampshire part of the National park, especially around Petersfield, highlighted the difference in functionality and quality of the two county HLC data sets and evidenced the need for this work to be undertaken by suitably experienced consultants.

The tender was sent out end June 2014 and four tenders were received and evaluated by the project team (landscape and heritage leads, and data manager). Wyvern Heritage was appointed as the clearly preferred candidate (some 10% higher marks than the second choice) and they had a positive reference from English Heritage. A preferred supplier meeting was held at end August 2014 and the contract was then issued with completion of delivery of the outcomes by end September 2015.

The appointed consultant soon proved to be technically very competent and identified pilot areas for development of both characterisation and GIS outputs. These were reviewed and found to be very satisfactory and the work then was then progressed. The agreed timetable and phased payments progressed well until February 2015 when the consultant was taken ill and notified us that this would delay project delivery. This was agreed to as the work delivered to date was to a very good standard. The consultant resumed full time work on the contract in September 2015 and a meeting was held to agree a new timetable, the changes in the Local Plan timetable meant that the slippage on the HLC work was not time critical. In July 2016 a progress review meeting was held when delivery of the GIS outputs was scheduled for late September 2016 (as the consultant had been commissioned as an expert witness for SDNPA on a planning inquiry) and a draft of the report for late October 2016. The consultant also agreed to a variation of contract so that she satisfactorily delivered a two hour training session to SDNPA officers on historic landscape characterisation. These deadlines were missed by the consultant and phone calls and emails were not answered. The lead officer issued a formal letter (after consulting the Head of Business Services) stating the contract would be dissolved if no reply was received. At this point the consultant contacted SDNPA with apologies stating that she had been unwell and proposing completion dates. The work has now been delivered and is to a good standard so that all the outcomes have been achieved.

Key findings and recommendations

There is always a risk in appointing a sole trader consultant and this was recognised but neither should this prevent the best tenderer being appointed. The consultant's work has been to a high quality and without any variation in cost. Additionally she has undertaken delivery of some data in advance to meet the needs of SDNPA officers (e.g. historic parks and gardens data). However the two periods of her ill-health had a major impact on the programme so that delivery has been concluded in January 2017 instead of September 2015.

Any project has a triangle of variables to project manage – time, budget and quality. In this case the project team and internal project manager took the view that her work was of high quality and it would have taken any other consultant a significant amount of time to get up to speed on the work. There has been no cost implications in the delays and so the variable of time was allowed to flex to achieve project completion.

Value for money

The project budget was set at £29,000 and the successful tenderer submitted a price of £28,050 which has not been exceeded. The total cost has been borne by SDNPA, partly from the Local Plan Evidence budget. There are no partners in this project.

As the quality of the results are very high and the conformity to the Sussex HLC is excellent this project has been good value for money. The work will not require repeating unless or until there is a major and radical change in the national standards for this type of work, which would hopefully be accompanied by Historic England grant to encourage local planning authorities to revise this evidence base.

Management Response

The project group's view is that this work is to a high standard and that it would not have been effective to dismiss the consultant or another firm to be appointed to start again. The decision was taken to allow the time to be delayed, which would not be appropriate in every case but has not been a major problem in this instance.

Use of a sole trader always carries a risk in consultancy work as there is no succession planning but it would be unfair and probably illegal to discriminate against them as compared to a larger consultancy. There are also potential benefits in working with a sole trader in terms of ownership of the quality of the resulting work. The impact of consultant illness will depend on the importance of time (in particular) within a project and if this is time critical it should be identified in the project's risk register and if need be on the team/directorate or corporate risk register. The learning from this piece of work is to understand the risks in each project and to explore to the appropriate level the resilience and contingency planning of any consultancy with a sole trader at interview stage or preferred supplier meeting to explore their planning for any delay due to ill-health, loss of equipment or other issues to reassure the client before appointing a sole trader.

Appendix I

Please insert a table recording progress against the original outputs/outcomes written in your PID and record the key aspects of the project legacy, both the intended and unintended legacy issues.

Output or outcome	PMP Outcome and or Policy/ Corporate Plan indicator	Progress
Project report on use of HLC and methodologies in the study area	PMP Outcome I	Completed
Project archive – all the information revealed in this study in a searchable format	PMP Outcome I	Completed
GIS layers for HLC of Hampshire and HSC	PMP Outcome I	Completed

Appendix 2

SDNPA Evaluation Follow-up plan for the implementation of Recommendations

Recommendation	Project Specific OR Corporate applicability	Management Response (accept/partially accept/not accept)	Comments (if not accepted please provide reason/explanation)	Follow-up Actions	Responsible person	Start date	End date	Status of implementation
Sole traders being appointed as consultants should make clear their contingency plans if they are taken ill and work is delayed, especially if time is critical in a project. This is taken up through the resources section of tender forms.	Corporate	Accept	Clear guidance for staff and support to make sure this issue is picked up will be put in place. Any changes to the tendering process will be considered and put in place.	To be considered in assessing risk in projects.	Project leads; Performance and Projects Manager/ Business Services Manager	Feb-17	Jun-17	

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Summary of corporate learning from evaluations

There were a number of learning points from the evaluations, many of which were similar in nature.

It is proposed that the following improvement activities are added to the improvement plan

Improvement action	Start date	End date	Owner
<i>From the Steyning Dukes Project</i>			
Provide support and guidance to projects as they are developed, to ensure that legacy management from projects, particularly where there is a call on SDNPA resources is incorporated into guidance and staff resource is available to support project leads.	April 2017	March 2018	Performance and Projects Manager
<i>From Hampshire Historic Landscape Characterisation</i>			
Ensure that where contracts are entered into with sloe traders an appropriate risk assessment is carried out and suitable provision made for contingency in tender and contract documentation	February 2017	June 2017	Performance and Projects Manager / Business Services Manager

