

End of project evaluation report

Hampshire Historic Landscape Characterisation

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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			To be considered in assessing risk in projects.	Project leads; performance officer	Feb-17		