

**SoTHW Evaluation Follow-up plan for the implementation of Recommendations**

Number	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
<b>Project Management skills, capacity and systems</b>									
1	Part of any future planning and project scoping phase should contain a risk assessment with mitigation strategies Heathlands Reunited appropriate to reduce critical systems failures and identify additional cost and resource implications	Corporate applicability	Accept	This is already a requirement of our project planning process. It is also applicable to external major projects Heathlands Reunited SDNPA is on steering group	Introduction of better monitoring and quality control to ensure all project managers create risk assessments as core part of project set up planning.	SDNPA Project Leads and Project Support Officers	Sep-17	Ongoing	Risk assessments and mitigation to be reviewed on a regular basis as risks and associated mitigation strategies may shift within the lifespan of a project. Dates for review should be included in project
9	<b>Use evaluation as a driver for improvement</b>	Corporate applicability	Accept	Formative and summative evaluation is essential alongside strong project management and monitoring. It is acknowledged that it would be useful for strategic leads to have a solid understanding of monitoring and evaluation methods being adopted.	Proposals for in-house training will be developed and delivered to help staff develop their understanding of evaluative methods used and the importance of their participation in the process.	Performance and Project Manager and PLIG	Oct-17	Mar-18	Not started
18	<b>When planning future projects start with the legacy the NPA wishes to achieve and work backwards</b> to ensure the alignment of one-off projects with corporate priorities	Corporate applicability	Accept	This will be a core part of the project management role in future. Constant back-checking to original purposes and ambitions of the project to keep it on track are vital to success of any project. This needs to be made explicit at the project proposal stage and accepted by all.  Note that not all projects will need to have a legacy that goes beyond the lifetime of the project. Do however need to allow for some flexibility as project legacy can shift - being too rigid can be detrimental to scope and project development	This will be built into project planning and actively managed when more project resource is available in house.	Project Manager, OMT PLIG, theme programme boards	Dec-17	Ongoing	Business case for new capacity accepted by SMT.  Specialist job descriptions have been developed and are currently being evaluated.  It is the intention to begin recruitment by the end of December 2017.
6	Future projects would benefit from <b>much greater administrative support</b> , particularly with regard to volunteer management; promotion and communication; event fulfilment; and any form of production - digital, exhibition, publication etc.	Corporate applicability	Accept	It has been widely accepted that this skills set was missing from SoTHW and has been addressed in the Heathlands Reunited project through recruitment of dedicated admin person. Important to make full use of the probationary period for project staff to ensure they are working effectively.	All future large scale projects to have dedicated administrator/project support officer	Project Manager and OMT	Sep-17	Ongoing	Will be picked up in the development of future large scale projects
2	Adopt a <b>universal project management system</b> (such as Asana or Prince2)  <i>(or a universal way of delivering projects, (which might include Prince 2 people for some projects and not so for others))</i>	Corporate applicability	Partially accept	SDNPA has already adopted the Chris Croft project management approach and training was rolled out during the initial SoTHW start up period and subsequently. It is considered sufficient for the type of project delivered by eh SDNPA. We have provided training on project management to all relevant staff. Project management guidance and resources are available on the intranet to support project managers.	Guidance which already exists for project management in the organisation will be promoted - and kept under review  Specialist project management capacity will be created in the organisation to ensure robust project management approach is taken across all SDNPA projects.	Performance and Project Team Manager & OMT	Dec-17	Mar-18	Business case for new capacity has been accepted by SMT.  Specialist job descriptions have been developed and are currently being evaluated.  It is the intention to begin recruitment by the end of December
4	Future project teams to contain <b>people with the requisite skills and experience to successfully deliver the programme</b>	Corporate applicability	Partially accept	It is not always possible to have full complement of skills in one project team - especially if skills are not required throughout the lifetime of the project.  Specialists are sometimes brought in once the project starts. Heathlands Reunited are times this will be crucial (e.g. technical knowledge, area specific experience/advice). This will be particularly pertinent if we are employing project managers with more generalised skill set as opposed to sector specific knowledge and experience.  If inviting partners onto interview panels for project staff Heathlands Reunited the SDNPA is leading the project then be clear that they are Heathlands Reunited to advise not to appoint. If it is a high risk project then	Specialist project management capacity will be created in the organisation to ensure a robust project management approach is taken across all SDNPA projects.	Project Management Lead and OMT	Dec-17	Ongoing	Recruitment of specialist project management support is due to be complete before the end of March 2018. The post holder will work cross-organisationally to support all those managing projects, with a specific focus on large scale high risk projects.

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5	7 SDNPA should expect to pay <b>considerably more</b> if it wishes to attract contract staff of suitable quality and experience, or alternatively, offer a bonus based upon performance - this should be factored into future budgets and bids	Corporate applicability	Partially accept	This has been flagged before as potentially being an issue when recruiting permanent staff, let alone contract staff. It is however unlikely to be an organisational priority, but may be taken on a case by case basis to recruit specialist staff or fill hard to fill roles.	Consider if such cost recovery can be implemented for large projects. Increased capacity in the organisation is being implemented - the job roles are currently being evaluated. Heathlands Reunited may be times when this is justified. Some projects in the future MAY require outside expertise which commands a certain rate of pay. Buying in this expertise can save issues with the project, so is a quantifiable investment/expense	N/A	N/A	N/A	N/A	
3	8 <b>In-house departments and staff should always play a central role</b> in future project design and delivery. Ensuring that funded projects are effectively incorporated into SDNPA's day to day activity and not siloed	Corporate applicability	Partially accept	Heathlands Reunited is a requirement to involve all relevant departments in project development at bid writing stage to ensure buy in and staff resource allocated (e.g. to help run events, to work on interpretation etc.) for the length of the project.  Some teams such as Comms may be called upon to a greater extent than others and the resource implication of this needs to be considered.  This was implemented in June 2015 during planning for Heathlands Reunited stage 2 application.	This will be actively managed by Project leads and Project Support Officer and Project Management Lead when in post.	Project Management Leads and Project Support Officer and OMT	Mar-18	Ongoing	Recruitment of specialist project management support due to be complete before the end of March 2018 to provide cross-organisational project management support.	
10	9 Attract a small number of <b>external experts to contribute to the quarterly project steering meetings</b> etc.	Corporate applicability	Partially accept	If paid then admin costs of running project increase. Noted that there may be an impact of the extra admin resource on the viability of the projects.	Do skills audit of partners to ensure everyone is bringing something different. Potentially use contractors (e.g. evaluators) for particularly skilled work	Project Manager and Project team	Skills audit to happen early in lifetime of any project.	Ongoing	Will be incorporated in to the next appropriate project	
12	10 Urgently <b>review financial systems and procedures</b> to ensure they are fit for purpose	Project specific	Not accept	Our systems are generally appropriate. The issue was specific to this project which had unnecessarily complicated budget lines that were incompatible with the SDNPA in house financial system. The project team had unrealistic expectations of the procurement process.	N/A	N/A	N/A	N/A	N/A	
	<b>Communication and audience engagement</b>									
7	11 <b>Involve all relevant departments in the creation of future public engagement projects</b> in order to draw out their expertise, to guarantee buy-in and future commitment, and to ensure prioritisation of resources at the right time	Corporate applicability	Accept	Involvement already improving with Heathlands Reunited. Having Communications and Engagement Officer working in the Comms team is proving effective	Performance and Projects Team will work with the Communications Team to provide support and make sure these issues are taken into account early enough in the development of these types of project.	Project Manager and OMT, and Communications Team	Date of next appropriate project	Ongoing	Involvement already improving with Heathlands Reunited. Having Communications and Engagement Officer working in the Comms team is proving effective	
14	12 All future projects should <b>integrate NPA Comms staff into the wider project team</b>	Corporate applicability	Accept	This is being done for major project and all projects moving forwards	This is essential and already happening with Heathlands Reunited to good effect	Performance and Projects Team, Communications Team, PM and OMT	Date of next appropriate project	Ongoing	Comms staff currently sit on the Heathlands Reunited steering group and Heathlands Reunited Comms and Engagement Officer works from Comms office much of the time	
15	13 Ensure <b>adequate planning and development for all types of event</b> . At least 6 months, and longer for larger events.	Corporate applicability	Accept	With Heathlands Reunited involving the wider SDNPA and by having project admin and dedicated Comms and Engagement Officer, should be easier to achieve than with SoTHW	As part of project development identify those types of event which might need longer term planning	PM and Project Team and Comms	Date of next appropriate project	Ongoing		
16	14 <b>Digital output should be part of a holistic audience development plan</b> that creates numerous touching points between the project and its potential audience - more emphasis on project-long digital engagement	Corporate applicability	Accept	Needs to be appropriate to target audience for future projects	Future projects should incorporate: early development of Facebook page, Twitter account etc. so people can get involved and buy into project much earlier in process and know to look out for events, volunteering opportunities etc.	PM and Project Team and Communications Team	Date of next appropriate project	Ongoing		

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15	Ensure <b>adequate planning and development for all types of event</b> . At least 6 months, and longer for larger events.	Corporate applicability	Accept	With Heathlands Reunited involving the wider SDNPA and by having project admin and dedicated Comms and Engagement Officer, should be easier to achieve than with SoTHW	As part of project development identify those types of event which might need longer term planning	PM and Project Team and Comms	ongoing	Ongoing	
16	<b>Digital output should be part of a holistic audience development plan</b> that creates numerous touching points between the project and its potential audience - more emphasis on project-long digital engagement	Corporate applicability	Accept	Needs to be appropriate to target audience for future projects	Future projects should incorporate: early development of social media approaches including a project specific Facebook page, Twitter account or other appropriate mechanism.	Project Manager and Project Team and Communications Team	Ongoing	Ongoing	
8	Adopt the tried and tested <b>Development Cycle</b> which will help to re-vision how the NPA engages with audiences and develops new content. The Development Cycle helps to encourage thinking and acting in an audience-focused way by delivering activity and communication using a planned and targeted approach. This provides SDNPA with an overarching framework by which to deliver a new and innovative approach to learning and <b>engagement content development</b>	Corporate applicability	Partially accept	We do have development cycle in place and accept that we always look to improve implementation.	All future projects will utilise this approach and SDNPA will ensure future project managers are familiar with the methodology or similar methodologies.	Project Manager, OMT and PLIG	Ongoing	Ongoing	Is this already happening with Heathlands Reunited
11	<b>Continue to develop public engagement systems</b> at the NPA and upskill staff to be proficient in their use- i.e. automating digital communication and engagement; adopt project management software; ensure project management systems are universally adopted across the NPA	Corporate applicability	Partially accept	SDNPA has these skills in house it is therefore more about capacity and whether we need more in-house resource.	Need to ensure project team work closely with in house team. Ensure allow plenty of lead in time if planning public engagement activities/events to maximise engagement	PM and Project team and the Communications Team	Ongoing	Ongoing	Is this already happening with Heathlands Reunited
17	<b>SDNPA should look to provide a more stimulating digital experience on its website</b> that incorporates user content and champions discussion etc. rather than being a one-way (broadcast) channel	Corporate applicability	Not accept	This would involve significant changes to the web system SDNPA uses. Changing our web system entirely is out of the question for a specific project - all such changes would need to be assessed on a cost benefit analysis - in this case, the changes required were not deemed proportionate to the cost involved	N/A	N/A	N/A	N/A	N/A
	<b>Volunteering</b>								

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13	21 Continue to <b>actively explore how best to develop cultural heritage volunteer opportunities</b> , either as part of a SDNPA programme or through partnership projects	Corporate applicability AND project specific	Accept	<p>Volunteers have been offered roles on the Heathlands Reunited project and they have been linked in with partners, but it has been agreed that SDNPA does not need to offer volunteers recruited for a project further opportunities outside of the above.</p> <p>Cultural heritage volunteering opportunities has been identified as a potential gap in our offering for our volunteers and heathlands Reunited is clearly a significant level of interest in such opportunities.</p> <p>Lessons learnt includes managing volunteer expectations and demands (i.e. undertaking tasks as specified in the project plan - only increased/deviated from with good reason/justifiable and not at the cost of other agreed actions/activities).</p>	<p>In future the SDNPA volunteering offer will include cultural heritage activities. This will be incorporated into the development of opportunities to be considered during creation of Volunteer Development Plan</p> <p>Future projects will set a ceiling on the number of volunteers recruited.</p>	Cultural Heritage Lead, Heathlands Reunited PM and Learning Outreach and Volunteering Lead	Volunteer Development Plan due to go to Members Dec 17	Dec-17	Underway