

# **New Forest Local Action Group Local Development Strategy 2008 - 2013**



**January 2008**

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## **New Forest Local Action Group Local Development Strategy**

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## **New Forest Local Action Group Local Development Strategy**

### **1.0 Executive Summary**

#### **1.1 Key facts**

- The New Forest Local Action Group (LAG) area is based around the boundary for the National Park, an area with cohesive identity of landscape and culture. The area also includes a number of surrounding rural parishes in order to include sufficient land to sustain the traditional pastoral and forestry economy of the area.
- The total population of the LAG area is 130,921.
- The New Forest LAG has already delivered a successful LEADER+ programme and consists of members with a wide range of skills and expertise. The New Forest LEADER proposal has a wider remit than the previous LEADER+ programme, so additional LAG members have been recruited for their contribution to the range and depth of skills considered necessary for the successful delivery of the new programme.
- The New Forest LAG comprises 22 members drawn from the local business sector, agricultural and forestry sectors as well as community, government organisations and relevant stakeholder groups, in the proportions; 41% private sector, 32% public sector, 9% voluntary sector and 18% community sector.
- The New Forest LAG is seeking £2,417,322 to support the delivery of their Local Development Strategy.

#### **1.2 Issues**

The New Forest landscape and its associated wildlife habitats, which support the tourism sector – the major contributor to the New Forest economy, is dependant upon the continuation of traditional land management practices such as commoning, farming and forestry. These practices are increasingly under pressure from a combination of low commodity prices, high feed prices, high land prices and rising costs, which make it increasingly hard for these rural land-based businesses to survive.

In addition, key community facilities in many of the villages and hamlets within the New Forest have reduced in number over recent decades, resulting in an increasing lack of identity and cohesion for each settlement, given the lack of meeting places in which residents would have traditionally interacted.

#### **1.3 Purpose of the Local Development Strategy**

This LEADER proposal seeks to increase the economic viability of those land-based industries on which the Forest depends, and by integrating economic aims with those for the natural environment. The LAG will seek to support projects which link economic and social outcomes to outcomes for nature conservation, climate change resilience and environmental quality, thus delivering across all three axes of the Rural Development Plan for England (RDPE).

The programme also offers the opportunity for the wider community to benefit through the provision of improved community facilities and access to services, particularly those identified through the community planning process.

#### **1.4 The Objectives of the New Forest Local Development Strategy**

The Local Development Strategy is built around 4 objectives, designed to deliver the priorities agreed by the local community:

##### **Objective 1: To support and encourage the production and promotion of New Forest wood products.**

Some of the key areas of activity to be delivered under this objective will include:

- Providing support and facilitation to make links in the supply chain and enable co-operative working
- Providing grants to support strengthening the supply chain and collaborative working
- Providing support for collaborative promotion and new markets for New Forest wood products, including local branding

##### **Objective 2: To support the development and marketing of New Forest farm products and rural micro-businesses.**

Some of the key areas of activity to be delivered under this objective will include:

- Support for collaborative marketing to promote an increase in the use of New Forest produce
- Provision of grants for production machinery and infrastructure costs
- Provision of grants to support co-operative working to reduce processing costs
- Provision of grants to support producers to add value to their products
- Provision of support and infrastructure grants for diversification into alternative crops, technologies and rural business sectors

##### **Objective 3: To encourage and support sustainable land, farm and forestry management.**

Some of the key areas of activity to be delivered under this objective will include:

- Support for the installation of renewable energy systems on agricultural and forestry holdings
- Provision of grants to support collaborative working to improve efficiency
- Provision of grants to support infrastructure for the sustainable management of water, soil and waste on agricultural and forestry holdings

##### **Objective 4: To provide support for rural communities to provide sustainable community facilities and essential community services.**

Some of the key areas of activity to be delivered under this objective will include:

- Grant support and advice for the installation of renewable technologies in communities and community buildings
- Grant support for the provision of new community facilities and the renovation and improvement of key community facilities
- Improved access to key rural services

## 2.0 Description of the Local Action Group area

*Please note: The statistics within this document generally refer to either the National Park area or the New Forest District Council area, as these are both a close match to the proposed LAG boundary and are the key statistics available for the New Forest at this time.*

### 2.1 Features of the Area

- The New Forest Local Action Group (LAG) area is based around the boundary for the National Park (see map in Appendix 1), an area with a cohesive identity of landscape and culture. More than half of the National Park (56% or 31,887 ha) is designated of international value for nature conservation. This is far greater than any other English National Park.
- The grazing of ponies and cattle (commoning) is a traditional land management practice in the Forest and continues to shape the landscape of the Open Forest and adjacent commons. The commoners' holdings and the need for pasture as back-up grazing have influenced the pattern of settlements and fields on the enclosed lands.
- The LAG area is largely open countryside interspersed with small settlements and villages, with woodland accounting for 33% of this area (not including the Open Forest). The LAGs key target groups of foresters and farmers are scattered throughout the area, both within villages and individual holdings. In some cases, members of the target groups are finding that they are unable to afford to live in the area and consequently have to operate their rural businesses while living on the periphery of the Forest.
- The New Forest is fringed by the expanding residential and industrial areas of the Bournemouth and Southampton conurbations and the Waterside parishes. In addition, the New Forest is easily reached by road from large centres of population throughout southern England and beyond and attracts approximately 13.5 million visits per annum. This brings with it benefits to the local economy, combined with pressures on land-use and conservation.

### 2.2 Land Use

#### Farming

- The farming economy still remains the major land use in the National Park, with just under 5% of the total population of the National Park employed in agriculture (*Defra 2004*). This is higher than county, regional and national levels. Around 13,480 ha of the National Park classified as farmland and of this, 59% is permanent pasture and a further 9% is temporary grassland, demonstrating the importance of livestock production in the New Forest. Arable and horticultural crops account for a further 16%.
- 55% of farms within the New Forest are smaller than 5 hectares, with approx 5% (mainly large private estates) over 100 hectares in size (*Defra, 2005 figures*).
- There are significant practical barriers to production in the New Forest area. These include a lack of slaughter and processing facilities. Many landowners are forced to send raw products outside the Forest for processing, which leads to lower profit margins, reduces traceability and increases the chances of spreading disease.

#### Forestry

- Within the New Forest there are 22,379 ha of woodland in blocks larger than 2 ha, of which 9,830 ha are ancient semi-natural woodland. The Forestry Commission manages 14,140 ha of the total woodland area and of the remaining 8,240 ha in private ownership,

about 3,600 ha are managed through woodland grant schemes and licenses. Much of the remaining woodland is under managed and non productive.

- The New Forest already has some of the basic infrastructure needed to support the development of its timber and woodlands sectors. There are sawmills, wood treatment and manufacturing facilities within the LAG area however they source much of the timber from outside the area due to the lack of production in the New Forest.

### Rural Businesses

- The New Forest is characterised by a large number of businesses and high levels of employment in service based industries, particularly those relating to the tourism industry (accounting for around 15% of the total workforce). Whilst overall VAT registered business stock continues to grow; the rate of business start-ups is below that of the South-East average. (Ref: ONS 2007)
- In addition, the New Forest has a high number of small businesses, with levels of self-employment significantly above those for Hampshire, the South-East and England. (*HCC Economic Profile 2006*)

## **2.3 Coherence**

### **2.3.1 Geographic Coherence**

- The geology and soils of the Forest have had a clear impact on the way the land has been used traditionally, and have had a basic influence on the pattern of land we still see today.
- The forestry and pastoral economy has remained a central part of the social fabric of the Forest. The grazing of ponies and cattle continues to shape the landscape of the Open Forest and adjacent commons.

### **2.3.2 Social Coherence**

- Largely as a result of commoning, the New Forest has retained a strong social identity and for many years local communities have demanded a role in the shaping of plans and policies for the New Forest. This tradition has continued and been invaluable during the delivery of the present LEADER+ programme and will continue to be so in the new programme.
- Protective management and planning policies have been in operation for many years and in 2005 were formalised with the designation of the New Forest National Park. In 2003 “A Strategy for the New Forest” was published and is still relevant today, although it will be superseded by the developing “National Park Management Plan” in early 2009.
- An 80-strong grouping of local interests (representing all of the New Forest organisations and communities) has been meeting every two months since 1979 to act as a sounding board for the statutory bodies of the Forest. This organisation is known as the New Forest Consultative Panel. The Consultative Panel is represented on the LAG.

### **2.3.3 Economic Coherence**

- The unique New Forest landscape, which supports the tourism sector – the major contributor to the New Forest economy, is dependant upon the commoning, farming and forestry sectors. In addition, a high proportion of farmers and commoners have secondary employment within the rural business and forestry sectors, demonstrating the complex links and inter-reliance of the land-based industries in the area.
- The New Forest Business Partnership which currently has approximately 500 members and is represented on the LAG, provides the opportunity for local businesses to network and coordinate their contributions to local government decision making.

## 2.4 LAG Area and Boundary

- The map in Appendix 1 shows the proposed New Forest LAG area and the parishes which will be included within the area. The boundary is based on that of the National Park but also incorporates a number of surrounding rural parishes in order to include sufficient land to sustain the traditional pastoral economy of commoning and mixed farming. This will ensure that the area includes the majority of the producers generating goods derived from the New Forest, as many are located around the periphery of the park due to high land prices and the availability of suitable business premises.
- The parishes of Burton and New Milton have been included as they feature large areas of grazing used by many of the farmers along the western edge of the Forest and as such are considered to have a direct impact on the proposed programme outputs. In addition, the area includes the small rural towns of Brockenhurst, Fordingbridge, Lymington, Lyndhurst, Milford-on-Sea, New Milton and Ringwood. These particular towns are critical to the success of the proposed projects, being a key element within the distribution chains for local produce, as well as key destinations for visitors. They contain the main populations of consumers as well as the shops and farmers markets that are the core retail outlets for many local products.
- A large proportion of the LAG area lies within the New Forest District Council area, with smaller areas within Test Valley Borough Council (both within the South-East region). In addition, the LAG area includes small areas of Salisbury District Council and Christchurch Borough Council (both within the South-West region).

## 2.5 Parishes and Rural Population Statistics

The total population for the proposed New Forest LAG area is 130,921 and the table in Appendix 2 lists the parishes and populations which will be included.

## 2.6 SWOT Analysis, Key Issues and Evidence

A full SWOT analysis for the New Forest is included in Appendix 3. This was developed during LAG meetings and through contact with organisations and individuals with specialist knowledge of the New Forest and our target sectors.

The key issues which emerged from the SWOT analysis are listed below and evidence to support these can be found tabled in Appendix 4:

### 2.6.1 Issues Affecting Agriculture in the New Forest:

- The farming and forestry sectors in the New Forest are struggling with economic viability, due to a wide range of issues including high land and housing prices, high input costs, low market prices and decreasing farmgate prices as a % of retail price (*Ref: Defra, Agriculture in the UK, 2006*). This is intensified in the New Forest owing to the predominance of small farms and the reliance on livestock farming, which makes them more vulnerable to fluctuations in input costs and unable to take advantage of economies of scale.
- Whilst there are potentially many opportunities for New Forest farmers to diversify and add value to farm produce, there has been a limited uptake of these opportunities due to a lack of resources and skills and evidence has shown that small farms are less likely to diversify and achieve viability in their new business venture (*Ref: Defra, Barriers to Farm Diversification, 2007*).
- Partly as a result of the factors listed above, the number of young people entering the agricultural sector, either as a full-time or part-time occupation is limited and this is

demonstrated by the ageing farming community (Ref: J Ivey, *Commoners of the New Forest: A Study based on Census Data 1996 to 2001.*)

### 2.6.2 Issues Affecting Forestry in the New Forest:

- The New Forest has a substantial resource (8,240 hectares) of private woodlands, many of which are either unmanaged or under-utilised (Ref: *Forestry Commission, 2007*).
- As a result of high production and harvesting costs and low timber prices, it has become difficult to economically manage those small-scale woodlands which are prevalent in the New Forest (Ref: *ONS and Forestry Commission, Timber Price Statistics, 2007*).
- There is a limited and fragmented wood-fuel supply chain within the New Forest, despite the large hectareage of woodland. However there are many private woodland owners who are interested in bringing woodlands back into management, but lack the skills, knowledge and support to do so (Ref: *Woodland Workshops, 2007*).
- There are a number of large private and public sector organisations in the area that are considering installing wood fuel heating systems and who will be sourcing wood fuel from a wide area, unless local markets can be developed.

### 2.6.3 Issues Affecting New Forest Businesses

- New Forest businesses are reliant on a small spectrum of industry types (e.g. tourism and agriculture) and these contribute to a relatively low Gross Value Added per head of total population (a measure of productivity) compared to adjacent areas (Ref: *HCC Economic Profile 2006*)
- A characteristic of businesses in the New Forest is that they are small (by employment size) and have specific needs with regard to business support & advice (Ref: *NOMIS*). This is particularly the case with rural industries as many local small scale producers have limited business experience and therefore lack the necessary skills to manage, develop and safeguard their businesses. However evidence suggests that this sector is unaware of, and are unlikely to access, professional business support and advice, (Ref: *J.Mitchell, Enterprise First, 2008*)
- The New Forest's location, sandwiched between the conurbations of Southampton and Bournemouth, places pressure on the limited amount of land available for development, and results in a scarcity of suitable 'rural' business premises. This factor, coupled with stringent planning policies in the District and especially in the National Park, is proving restrictive for businesses who wish to expand or relocate their operation within the Forest (Ref: *New Forest Business Needs Survey 2005*). Whilst the environment of the area is an economic asset, there is therefore a greater need to support the more limited range of economic activity which can be accommodated.

### 2.6.4 Climate Change Issues

- Given the predictions for the impact of climate change in the New Forest (Ref: *UKCIP02 scenarios, Hulme et al. 2002*), farmers and foresters will need to embrace new farming and forestry practices to mitigate and adapt to the effects of:
  - An increased risk of drought and water shortages, resulting in a reduction in soil moisture and changed hydrology. This will lead to a decrease in the quality of grazing land and a lack of water sources for animals grazing on the Open Forest.
  - An increase in hot weather health problems for livestock
  - An increased flood risk leading to increased soil erosion and pollutant leaching

## 2.6.5 Lack of Access to Community Facilities

- Community facilities in many of villages and hamlets in the New Forest have reduced in number over recent decades (Ref: Consultation with Parishes, New Forest National Park Authority, 2006). This will be compounded by the proposed closure of 8 rural post offices in the New Forest.
- Limited access to services in some areas of the New Forest is evidenced by the Access to Services domain in the Indices of Deprivation. This has implications for the high proportion of elderly residents who often do not have access to a car, and so have limited access to essential facilities (Ref: Defra Rural Statistics Unit, *Census 2001 and Access to Services, Focus on Rural Areas: New Forest, 2004*).
- Existing village halls are mostly older buildings which are expensive to heat and run, putting an additional financial burden onto the parishes trying to keep these community facilities viable.

## 2.7 Evidence to Support Areas and Types of Disadvantage

Although the New Forest is generally not considered to be a deprived area, this does hide a specialist agricultural and forestry sector that suffer on many levels from low incomes, marginal sustainability and an ageing workforce.

The District level analysis of the Rural Evidence Research Centre for 2005 (based on changes 1998 – 2001), categorizes the New Forest as a significantly rural, low productivity, district. Defra classify the New Forest as being one of five districts in the South East with significant poor rural economic performance (Ref: *Local Futures Group: The Knowledge Economy in Rural England, 2004*).

The Index of Multiple Deprivation (IMD) takes into account a wide range of domains when calculating the overall deprivation score. Whilst the 2007 IMD shows that almost 50% of the Lower Layer Super Output Areas (LSOAs) in the Forest are amongst the 25% least deprived in England, there are a significant proportion of deprived LSOAs within the domain which refers to the Access to Services. Of the 32,500 LSOAs in England (115 in the New Forest), one of those located within the Downlands and Forest ward is ranked at 325 (within the bottom 1%) and overall, 25 LSOAs within the New Forest, fall within the bottom 25% in this domain.

There are also signs of deprivation with regard to education, skills and training. Two New Forest SOAs are in the bottom 10% of most deprived nationally within this category, and 6 in the bottom 20%. The area has a greater proportion of those without qualifications (27.6%) compared to the county (24.8%) and regional levels (25.1%) (Ref: *OCSI, The Rural Share of Deprivation in the South-East: Hampshire, version 2, 2007*). Many residents of the New Forest suffer from rural isolation. 10.5% of households in the New Forest fall into this category, compared to 5.6% for Hampshire and 5.4% for the UK.

The New Forest has an atypical structure of employment. Local jobs are biased towards skilled trades, operatives, personal services and elementary occupations. All of these are lower skilled and lower income occupations. 6.3% are engaged in agriculture, compared to 2% for the SE, 12.5% in Hotels and Catering compared to 6% in SE.

### **3. Local Development Strategy**

#### **3.1 Engagement with Rural Communities and Businesses**

The New Forest Development Strategy is based on a package of themes, projects and initiatives identified through four key stakeholder workshops held during July (pre-expression of interest stage) and October 2007, as well as through a number of individual meetings and contacts with organisations and individuals unable to attend the workshops.

Participants at the workshops were drawn from a wide range of stakeholder groups including farmers, commoners, community groups, foresters, forestry contractors, local producers, land managers, local businesses and relevant statutory organisations.

The organisations and businesses (individual farmers and foresters have not been listed) that have contributed to the development of the New Forest Local Development Strategy are listed in Appendix 5.

Letter of support for this bid from New Forest organisations and businesses are included in Appendix 14.

#### **3.2 Building on the New Forest LEADER+ experience**

The New Forest has received funding under the existing LEADER+ programme from 2002-2008. This programme largely focused on helping secure the long term viability of the commoning community through adding value to local produce and encouraging sustainable land management.

Projects included the setting up of a local quality assurance scheme - where efforts concentrated on persuading commoners and small local producers that there is merit in working collectively under a local quality brand and the development of small scale markets where commoners and producers could test out their products on the public. Both these initiatives were complemented by produce development and sustainable land management support.

This programme has been very successful in encouraging commoners and small producers to think about their enterprises as small businesses and to begin to develop the skills and capacity to better secure their long term future. This work is now considered to be mainly completed and the focus now needs to shift to allow larger scale commoners and producers to take advantage of opportunities provided through the new LEADER programme.

Using the experience from LEADER+, the new LEADER programme has been designed to focus on farmers, foresters and micro-businesses and will be aimed at medium and larger scale enterprises. Projects will concentrate on developing the skills and infrastructure for commercially viable operations and practices both in the forestry and farming sector. This will require a different approach to LEADER+, but will draw on and further develop successful initiatives developed under LEADER+ such as the New Forest Marque. New approaches include developing links with surrounding urban populations, increasing the scale of production of a range of farm products and kick-starting the development of new markets in the woodland and forestry sectors.

### 3.3 Description of the Main Themes and Activities That Will be Addressed, the Objectives and Priorities for the Area and Indicative Projects

The New Forest Development Strategy is focussed around 4 key objectives;

#### **Objective 1 - To support and encourage the production and promotion of New Forest wood products**

Woodland is a key component of the New Forest landscape and contributes to the South-East's position as England's most wooded region. In the New Forest a substantial proportion of the woodland is managed (by the Forestry Commission), as it is on Crown land. However there is also a substantial resource of private woodlands which are difficult to manage economically. This potential resource is underutilised; due to a variety of factors including the fragmented nature of many private woodlands, under investment, poor economies of scale and poor returns from forestry activities.

The lack of young people entering the forestry industry is also cause for concern. If under-managed woodlands are to be brought back into management then the lack of opportunities for young people entering the forestry sector will need to be addressed.

There is considerable opportunity for farmers and foresters in the New Forest to improve income and competitiveness from woodlands, though this will require skills development, greater collaboration and the development of fully integrated supply and distribution networks for all woodland produce (including wood-fuel, game etc). As has been shown during the development of the New Forest's local food networks, raising awareness of the availability of local timber and wood-fuel supplies amongst the general public and retailers will be an essential component of this work. The surrounding urban areas offer potential markets for wood products, especially wood fuel. In addition, the proposed growth in housing provision in South Hampshire (4,000 new homes per annum to 2026) will increase this potential market.

#### **Our vision**

The New Forest vision for this area of work, as discussed and agreed at the Forestry and Woodland stakeholder workshop in October, is summarised in the following statements:

- Local forestry-based industries will be thriving businesses that will attract future generations.
- We will secure the future of the New Forest woodland resource by achieving financial viability for sustainable woodland management.
- We will maximise the contribution that trees, woods and forests make to the quality of life for those living in, working in and visiting the New Forest.
- Our woodlands will make an increasing contribution to the New Forest economy, whilst also contributing towards the reduction in carbon emissions.

#### **Broad areas of activity and indicative projects**

- 1) Provide support and facilitation to make links in the supply chain and enable co-operative working

Indicative projects:

- Identifying supply and demand for wood products
- Developing woodfuel supplies on estates to encourage self-sufficiency
- Developing links in the distribution chain
- Developing of supply and producer networks
- Developing collaborative working practices and shared equipment and machinery rings\*

2) Provide grants to support strengthening the supply chain and collaborative working

Indicative projects:

- Infrastructure and establishment grants and support for new and existing woodfuel producers
- Grant support for machinery to improve supply chain for individual farmers and foresters eg. automated saw-wood production / firewood processors
- Grant support for cooperative projects such as sharing equipment, machinery, storage sites and transport eg. mobile sawmill and infrastructure for storage, chipping and pellet-making
- Development of collaborative uses for surplus chip and unused wood cuts eg. local hub for small woodland owners to feed into
- Support for local businesses to develop and produce required amenity products eg. picnic tables

3) Support for collaborative promotion and new markets for New Forest wood products, including local branding

Indicative projects:

- Development of a Forest Forum for woodland and forestry owners and managers\*
- Development of a New Forest quality assurance scheme for wood products
- Development of marketing opportunities for New Forest timber and wood products, especially wood fuel, particularly collaborations with developers in surrounding urban areas
- Development of green wood uses in local building projects
- Development of a directory promoting suppliers of New Forest woodland products
- Development of New Forest area on Woodnet – easily accessible information on timber supplies

4) Provision of training and mentoring schemes (where not available through existing providers)

**Indicative projects:**

- Initial woodland event for professionals incorporating machinery demonstrations, workshops and presentations by those involved in existing projects.
- Training in technical skills eg. Ignite courses for new wood-fuel producers\*
- Development of a furniture and woodcraft training facility / design school (including training in rural crafts eg. coppice products)
- Development of a furniture-making apprenticeship scheme
- Mentoring scheme to develop skills in wood-fuel production\*

*\*The delivery of these particular projects will be subject to discussions with RBAT and will be delivered either through RBAT providers or where this is not possible, through bespoke arrangements within the New Forest.*

**Objective 2 - To support the development and marketing of New Forest farm products and rural micro-businesses**

The combination of low commodity prices, the high cost of grazing land off the Forest and the lack of affordable housing have placed farming in an extremely vulnerable position in the New Forest. Livestock farming is also increasingly under pressure from a combination of high feed prices and rising costs, which make it progressively harder for smaller rural land-based businesses to survive. The lack of local processing facilities is also a major issue.

Commoning has always been a part-time occupation dependant on other areas of the local economy to supplement incomes. Initial work has shown that adding value to locally produced goods will increase prices, but continuing measures are needed to support a better and sustained financial return for farmers. Further work is also required to build on the increasing demand for local produce, ensuring that the supply chains and markets are linked in a way which will provide long-term sustainability. The provision of local processing facilities would also help to stabilise the industry during disease outbreaks. Support for farming and forestry industries will also benefit commoning through the supply of additional land-based work which provides essential supplementary income for the commoners.

**Our vision**

The New Forest vision for this area of work, as discussed and agreed at the Local Produce stakeholder workshop in October, is summarised in the following statements:

- Forest products will be produced, processed and packaged within the New Forest but distributed countrywide.
- New Forest products will provide viable economic returns for their producers and are sought after by residents, visitors and retailers from across the UK.
- Local land-based industries will be thriving businesses which will attract future

generations.

- There will be long-term mutually beneficial partnerships between all members of the local food chain.

### **Broad areas of activity and indicative projects**

1) Support for collaborative marketing to promote an increase in the use of New Forest produce (building the long-term viability of existing New Forest quality assurance schemes)

#### Indicative projects

- Launch Festival of New Forest Food – annual event to raise profile of New Forest produce and the New Forest as a food destination
- Feasibility and development of a New Forest “sellers” website for collaborative selling
- Market research to identify why many local businesses do not use local produce
- Marketing aimed at retailers and consumers in the urban areas surrounding the New Forest, in order to maximise outlet opportunities and enhance consumer awareness.
- Development of food safaris for local buyers
- Development of food experience weekends
- Co-ordination of venison production and marketing to consumers and retailers.
- Development of local produce hub – central site for storage and wholesale of produce
- Development of New Forest Food and Farming Centre – central retail outlet for New Forest produce
- Improved utilities and services for Beaulieu Road Sales Yard
- Development of quality assurance for New Forest ponies – set criteria at point of sale eg. wormed, vaccinated, halter-broken etc

2) Provision of grants for production machinery and infrastructure costs

#### Indicative projects

- Support for venison processing facilities - primary venison product to skinned carcass and storage
- Support for infrastructure installations to allow local producers to take step-up from small to medium scale production. Eg. cheese-making machinery, improved or enlarged dairy facilities

3) Provision of grants to support co-operative working to reduce processing costs

#### Indicative projects

- Support for collaborative venison storage facilities eg. chillers / deer larders
- Support for producer clusters to purchase joint equipment eg. weaving / feltmaker
- Infrastructure costs for development of locally accessible abattoir facilities
- Support for collaborative home delivery service

4) Provision of grants to support producers to add value to their products.

Indicative projects

- Conversion of barns to alternative uses which add value to products eg. farm shops
- Support for development of new products eg. New Forest flour from local grain
- Support for packing and storage equipment eg. chiller units, vacuum packing

5) Provision of support and infrastructure grants for diversification into alternative crops, technologies and rural business sectors

Indicative projects

- Support for diversification into new crops eg. thatching straw for local thatching industry
- Support for the development of new uses for crops eg. bracken for energy use
- Infrastructure costs for provision of incinerator for the disposal of fallen stock
- Farms diversifying into equine businesses
- Farms diversifying into tourism businesses eg. B and Bs

6) Provision of training and mentoring schemes (where not available through existing providers)

Indicative projects

- Training in deer management and venison production for producers of primary product\*
- Training and one to one advice to small producers on how to develop websites and sell via the web.\*
- Topic specific marketing training and advice for small producers on how to expand and diversify their range\*

*\*The delivery of these particular projects will be subject to discussions with RBAT and will be delivered either through RBAT providers or where this is not possible, through bespoke arrangements within the New Forest.*

### Objective 3 – To encourage and support sustainable land, farm and forestry management

There is now widespread consensus amongst scientists, that human-induced global warming and climate change is taking place due to the emissions of carbon dioxide and other pollutants.

The proposed LEADER programme will contribute to the adaptation and mitigation for climate change through support for the installation of renewable energy installations on farms and estates (encouraging those that can be self-sufficient, for example producing wood-fuel on their holding to support their own heating system) and the development of business opportunities for our target groups through the development of renewable energy supplies and markets within the New Forest.

#### Our vision

The New Forest vision for this area of work, as agreed by all key stakeholders is summarised in the following statements:

- Farmers and landowners will support environmentally responsible farming and forestry for both economic and conservation purposes.
- In the New Forest there are prosperous land-based industries which support a skilled and valued workforce.
- New Forest land managers conserve and manage energy, water and soil resources effectively.

#### Broad areas of activity and indicative projects

##### 1) Apprenticeship opportunities and support for sustainable farm and land management practices

###### Indicative projects

- Development of woodland management plans for private woodland owners intending to bring their woodlands into economic use\*
- Development of farm soil and nutrient plans including nitrate management, manure plans, compaction issues and the development of soil risk assessments.\*
- Lowering of inputs, slurry and manure management, particularly relating to Nitrate Vulnerable Zone regulations
- Development of individual proposals for the use of renewable energy technologies on agricultural and forestry holdings
- Development of sustainable land management apprenticeship scheme to encourage more young people into the land-based sector\*

##### 2) Support for the installation of renewable energy systems on agricultural and forestry holdings

Indicative projects

- Promotion of the use of renewable energy for heating and cooling and marketing the economic benefits of reducing energy use and using renewables
- Grant support for the installation of wood heating systems
- Grant support for the installation of small-scale wind turbines and solar panels
- Grant support for the installation of hot bedding schemes (eg. use of manure to heat greenhouses)
- Grant support for conversion to bio-fuels

3) Grants to support collaborative working to improve efficiency

Indicative projects

- Development of central recycling facilities for organic matter – composting manure
- Purchase of shared waste management machinery

4) Grants to support infrastructure for the sustainable management of water, soil and waste on agricultural and forestry holdings

Indicative projects

- Installation of water management systems eg. rain savers, reservoirs, water separation systems
- Support for the installation of anaerobic digesters

*\* The delivery of these particular projects will be subject to discussions with RBAT and will be delivered either through RBAT providers or where this is not possible, through bespoke arrangements within the New Forest.*

**Objective 4 – To provide support for rural communities to provide sustainable community facilities and essential community services**

Community facilities in many of the villages and hamlets within the New Forest have reduced in number over recent decades (consultation with parishes, NFNPA, 2006) often resulting in an increasing lack of identity and cohesion in settlements, given the reduction in meeting places where residents would have traditionally interacted. These issues will be exacerbated by the proposed closure of 8 further post offices in the New Forest which will also have a potential impact on the viability of the existing village shops. These changes all have their greatest impact on the most vulnerable groups in the community, particularly those who are unable to travel the further distances to access these key services.

Over recent years, residents have been encouraged to get involved in and produce a range of community plans including parish plans, village designs statements and market town health checks and many areas in the New Forest have already completed these plans. However, residents have questioned the benefits of the community planning process when there is a lack of resources to implement the completed plans.

The proposed LEADER programme will contribute towards the provision of new facilities such as a community shop or toward improvements to existing facilities, for instance the installation of a wood-fuel boiler or solar panels on a village hall in order to reduce their energy costs. Emphasis would be given to initiatives which could be linked to opportunities for our target groups i.e. local producers supplying village shops, bio-fuel heating systems etc.

The programme also offers the opportunity for residents to really benefit from their community planning work, through the support for facilities identified within their community plans.

### **Our vision**

The New Forest vision for this area of work, as discussed and agreed at the Sustainable Communities stakeholder workshop in October, is summarised in the following statements:

- All residents will have the opportunity to shape their communities and the facilities they have and will have access to the facilities they need.
- The New Forest will have high quality, user-friendly community facilities which minimise climate change through good design, energy efficiency, the use of renewable energy and the efficient use of natural resources.
- The New Forest will have sustainable community facilities which meet the needs of existing and future generations and take account of all members of the community.

### **Broad areas of activity and indicative projects**

#### 1) Support for the development of community interest companies and social enterprises

##### Indicative projects

- Advice and business planning for threatened village shops re. establishing community interest companies and social enterprises.
- Development of a 'toolkit' for village shop management and enlargement

#### 2) Grant support and advice for the installation of renewable technologies in communities and community buildings

##### Indicative projects

- Support for independent energy advice to establish best use of alternative energies in community buildings eg. Sway Village Hall
- Installation of wood-fuel heating systems eg. Lyndhurst Community Centre
- Installation of community heating / energy schemes

#### 3) Grant support for the renovation and improvement of key community facilities

##### Indicative projects

- Development and enlargement of community shops

- Development of green-spaces
- Renovation of village halls to improve facilities e.g. Lyndhurst Community Centre and Sopley Village Hall

#### 4) Provision of new facilities, including outdoor recreation facilities

##### Indicative projects

- Installation of youth facilities e.g. youth shelters
- Installation of sport and recreational facilities
- Development of village walks

#### 5) Improved access to key rural services

##### Indicative projects

- Installation of ICT and internet access within community buildings

#### 6) Sustainable waste management schemes (to complement schemes provided through statutory sources)

##### Indicative projects

- Installation of community composting schemes

### **3.4 Fit with Regional and National Priorities**

The proposal for the New Forest LEADER programme would deliver towards the following regional and national priorities:

#### **3.4.1 Rural Development Programme for England**

The table below clearly demonstrates how the New Forest Development Strategy would deliver towards many of the measures within Axes 1 and 3 of the Rural Development Programme for England. In addition to this, the specific nature of farming in the New Forest means that support for the farming community also delivers towards the objectives for Axes 2, as commoning is an essential component in the management and maintenance of the Natura 2000 sites within the New Forest.

The Strategy takes into account the complex links which exist between the landscape, habitats, cultural heritage and the local economy of the Forest and the way of life of the Forest communities. The Strategy proposes an integrated approach through which the Forest's economy and culture continue to contribute to, and support its special landscape and character, thus delivering across all three of the RDPE axes.

Without a LEADER programme in the New Forest, it is unlikely that RDPE funding would reach many of the farmers and foresters within the area. The small-scale nature of forestry and agriculture within the Forest mean that the resources, skills and confidence required to access RDPE funding are often not available. The proposed LEADER programme will allow these smaller projects to proceed by providing tailored support and assistance to help applicants through the funding process.

| Measure  | Proposed activities contributing towards the delivery of this measure   |
|--|---|
| 121 – Modernisation of agricultural holdings   | <ul style="list-style-type: none"> <li>▪ Support for renewable energy schemes and installations</li> <li>▪ Infrastructure grants for sustainable waste and soil management schemes</li> <li>▪ Support to update agricultural holdings and equipment to better react to modern production systems, and regulations eg. permanent biosecurity measures, clean / dirty water separation systems, machinery to enable more sustainable land management practices</li> </ul>                                       |
| 122 – Improving the economic value of forests  | <ul style="list-style-type: none"> <li>▪ Support for production machinery, infrastructure and storage facilities relating to the management of private woodlands and manufacture of wood products</li> <li>▪ Infrastructure and equipment grants for collaborative working arrangements</li> <li>▪ Business planning assistance linked to the development of new grants under this measure</li> </ul>   |
| 123 – Adding value to agricultural and forestry products   | <ul style="list-style-type: none"> <li>▪ Investment for farmers, foresters to add value to primary produce and waste products</li> <li>▪ Development of links in the livestock production chain</li> <li>▪ Collaborative marketing for the promotion of New Forest farm products</li> <li>▪ Collaborative marketing for the promotion of New Forest wood products</li> <li>▪ Development of new products eg. wood-fuel, flour</li> <li>▪ Development of quality assurance scheme for wood products</li> </ul> |
| 124 - Co-operation for the development of new products, processes and technologies in the agriculture and food sector and the forestry sector. | <ul style="list-style-type: none"> <li>▪ Investment for collaborative working practices to increase efficiency in farming and forestry.</li> <li>▪ Support for legal assistance in the development of sustainable collaborative working.</li> </ul>   |
| 311 – Diversification into non-agricultural holdings   | <ul style="list-style-type: none"> <li>▪ Support for diversification into non-agricultural businesses eg. equine businesses, tourism businesses</li> </ul>  |
| 312 – Support for the creation and development of micro-enterprises  | <ul style="list-style-type: none"> <li>▪ Support for the development of micro-businesses which add value to local produce (eg. craftsmen producing furniture from local timber)</li> <li>▪ Production of wood products by small-scale private woodland owners</li> <li>▪ Support for the start-up and development of small-scale land-based businesses</li> </ul>   |
| 321 – Basic services for the economy and rural population  | <ul style="list-style-type: none"> <li>▪ Support for the development of community buildings</li> <li>▪ Grant support for the development of community enterprises eg. community shops</li> <li>▪ Support for energy advice and installation of renewable energy schemes for community buildings</li> </ul>  |
| 322 – Village renewal and  | <ul style="list-style-type: none"> <li>▪ Grant support for community-based renewable</li> </ul>   |

|   |  |
|---|--|
| development   | <p>energy schemes</p> <ul style="list-style-type: none"> <li>▪ Renovation and enlargement of community facilities</li> <li>▪ Support for small-scale infrastructure projects eg. amenity spaces, village landscapes</li> <li>▪ Support for the provision of key rural services eg. IT / internet access</li> <li>▪ Support for community waste management and recycling schemes eg. composting scheme</li> </ul> |
| 331 – Training and information for farm diversification | <ul style="list-style-type: none"> <li>▪ Support for sustainable land management practices</li> <li>▪ Training in business management skills for land-based businesses</li> </ul>  |
| 421 – Implementing co-operative projects between LAGs   | <ul style="list-style-type: none"> <li>▪ Development of trans-national links with countries experienced in wood-fuel production through co-operatives and small woodland owners.</li> <li>▪ Joint woodfuel and wood product marketing with Isle of Wight and Winchester / East Hampshire LEADER programmes</li> </ul>  |

### 3.4.2 SEEDA Regional Economic Strategy

Projects supported under the proposed New Forest LEADER programme will contribute towards the delivery of many of the “Key Actions for Rural Areas” within the SEEDA Regional Economic Strategy, including:

- Investing in the economic viability of villages and market towns across the rural South-East.
- Assisting the food and farming sectors to adapt to new regulations....while enhancing the natural resources on which they rely.
- Supporting the development of premium local products by investing in land-based products supply chain, adapting high quality standards.
- Investing in and promoting the area’s cultural, heritage and landscape assets.

### 3.4.3 South East England and London Regional Implementation Plan

The New Forest LEADER programme will contribute towards the following priorities within the SE England Regional Implementation Plan:

| Priority  | Proposed activities contributing towards the delivery of this priority  |
|---|---|
| 1-1 Improving competitiveness and sustainability through technology transfer and skills development | <ul style="list-style-type: none"> <li>▪ Business planning assistance for farmers, foresters and micro-businesses</li> </ul>  |
| 1-3 Stimulate enterprise and innovation   | <ul style="list-style-type: none"> <li>▪ Investment for farmers, foresters for diversification enterprises that add value to primary produce and waste products</li> <li>▪ Collaborative marketing for the promotion of New Forest farm products</li> <li>▪ Collaborative marketing for the promotion of New Forest wood products</li> <li>▪ Development of new products eg. wood-fuel, flour</li> <li>▪ Development of quality assurance scheme for wood products</li> </ul> |

|  |  |
|--|--|
| 1-4 Assisting the livestock sector to improve efficiency, competitiveness and environmental management | <ul style="list-style-type: none"> <li>▪ Development of links in the livestock production chain</li> <li>▪ Support to update agricultural holdings and equipment to better react to modern production systems, and regulations eg. permanent biosecurity measures, clean / dirty water separation systems, machinery to enable more sustainable land management practices</li> </ul>       |
| 1-5 Encourage improved management of water resources   | <ul style="list-style-type: none"> <li>▪ Support for the planning and installation of winter rain storage reservoirs and water saving irrigation schemes</li> </ul>  |
| 2-1 England's natural environment is conserved and enhanced  | <ul style="list-style-type: none"> <li>▪ Support for sustainable land management practices</li> </ul>  |
| 2-3 Promote forestry management  | <ul style="list-style-type: none"> <li>▪ Support for production machinery, infrastructure and storage facilities relating to the management of private woodlands and manufacture of wood products</li> </ul>   |
| 3-1 Improving competitiveness and sustainability through technology transfer and skills development    | <ul style="list-style-type: none"> <li>▪ Business management and marketing support for the start-up of small-scale land-based businesses</li> </ul>  |
| 3-2 Stimulate enterprise and innovation  | <ul style="list-style-type: none"> <li>▪ Support for diversification into non-agricultural businesses eg. equine businesses, tourism businesses</li> <li>▪ Support for the development of micro-businesses which add value to local produce (eg. craftsmen producing furniture from local timber)</li> <li>▪ Production of wood products by small-scale private woodland owners</li> </ul> |
| 3-4 Developing an effective LEADER programme   | <ul style="list-style-type: none"> <li>▪ Development of a cross sector LAG and Local Development Strategy to represent farming, forestry, micro-business, environmental and community interests.</li> </ul>  |

### 3.4.4 SEERA – South-East Plan

The proposed New Forest LEADER programme will contribute towards the following policy proposals within the South-East Plan:

#### *Policy CC2: Climate Change*

- Improving energy efficiency of new and existing buildings
- Encouraging development and use of renewable energy

#### *Policy NRM5: Woodlands*

- Promoting and encouraging the economic use of woodlands and wood resources, including woodfuel as a renewable energy source.

#### *Policy BE5: The Role of Small Rural Towns*

- Supporting and reinforcing the role of small rural towns as local hubs for employment, retailing and community facilities and services.

### **3.4.5 Seeing the Wood for the Trees – A Forestry and Woodlands Framework for South-East England**

Objective 1 of the New Forest LEADER proposal will complement many of the themes within this framework and will contribute towards the delivery of the following outputs:

- *Output 6.1:* Support for business innovation and entrepreneurship in the woodland sector and the added-value processing and marketing of local woodland products.
- *Output 6.2:* Promotion of, and support for, existing markets for woodland products and measures to expand these.
- *Output 6.3:* Promotion of local woodland products among purchasers and specifiers.
- *Output 6.4:* The market and supply chain for wood as a source of renewable energy in the region developed.
- *Output 10.1:* The importance of retaining and developing the woodland workforce more widely recognised among those addressing issues.
- *Output 10.3:* Specific schemes developed to address gaps in skills among the woodland workforce.
- *Output 11.2:* Measures in place to put woodland owners not currently managing their woods in touch with sources of woodland management information, advice and support.
- *Output 12.2:* Better co-operation and communication established between the various parts of the woodland sector and customers to ensure that the sector can take advantage of opportunities.

### **3.5 Alignment with Local Strategies and Initiatives**

The proposed LEADER programme contributes towards and complements the aims, objectives and actions promoted within the Strategy for the New Forest, 2003 which was developed and supported by a wide range of New Forest organisations and individuals. The proposed programme particularly supports the following key strategy objectives:

- Maintaining farming as a major land use and an important part of rural life in the Forest, promoting and supporting changes towards more sustainable farming which puts the Forest first.
- Maintaining sustainable forestry and woodland management as important land uses which benefit the local economy, while making sure they help to conserve the special landscape character and wildlife value of the Forest.
- Supporting sustainable businesses and services which contribute to the Forest's economic well-being, environmental quality and special character, and use local knowledge, expertise and resources to create more Forest-based work opportunities.
- Supporting the role of village and town centres as a focus for the community, serving the needs of both local people and visitors.

The programme will also contribute to the delivery of many of the priorities within the draft Sustainable Community Strategy for the New Forest District 2008-2012, supporting the following priorities:

- Improving access to training opportunities for developing business skills.
- Increasing the economic benefits derived from local distinctiveness.
- Increasing the vitality and viability of town and village centres.
- Support for land management which sustains the special qualities of the area.
- Reducing the use of non-renewable resources.
- Adapting to climate change.

- Promotion of the New Forest Marque to the tourism and visitor sector.

The next round of Local Area Agreement (LAA) priorities have not yet been agreed for this area but will be worked up during the early part of this year. The LAG is keen to engage with the development of the LAA targets in order to maximise the use of LEADER resources.

### **3.6 Addressing Disadvantage and Economic Regeneration in the Area**

The New Forest Local Development Strategy aims to address disadvantage by targeting disadvantaged groups, ensuring that they receive sufficient support and capacity building to make sure they are fully engaged in the programme. The New Forest LAG has well established links with farming and land-based industries, as these have been well represented on the LAG in the previous LEADER programme. Groups are now beginning to overcome their earlier suspicions about using EU funding to support their enterprises, and this will be built upon in the new programme.

The New Forest LEADER programme will stimulate economic regeneration by;

- encouraging business start-ups drawing on the resources of the area
- helping growing businesses to take the next steps
- helping land-based businesses to achieve long-term viability
- helping businesses to diversify and widen their customer base to insulate against change in the wider economy
- helping businesses to make better links and attract customers from the surrounding urban conurbations.

### **3.7 Commitment to Working with Rural Businesses and Communities**

The LAG partnership already has strong links with local rural businesses and the community sector. LAG members will use these links to ensure that the availability of LEADER funding and the programme's achievements are actively promoted to target groups.

The main rural business networks in the New Forest are represented on the LAG including the NFU and the New Forest Business Partnership which currently has 500 members. In addition, individuals on the LAG are members of organisations such as the NFU, CLA, NF Tourism Association and Chamber of Commerce and will use these networks to actively promote the LEADER programme.

As well as considerable community representation on the LAG, the majority of LAG members are local residents and as such will use both formal and informal links to promote the LEADER programme amongst rural communities.

### **3.8 Commitment to Sustainability**

To ensure the environmental sustainability of the individual projects which apply to the LEADER programme, the LAG will use a sustainability checklist (developed by SEEDA) which will test all projects against specified criteria to ensure that there are no environmental disbenefits.

The checklist should include the assessment of the benefits of each project such as conserving and enhancing biodiversity, reducing waste, recycling, encouraging energy efficiency, reducing carbon emissions, minimising pollution and the use of locally produced materials, whilst also highlighting any likely negative environmental effects of the project. The LAG will carefully consider each project to ensure that they will contribute to the environmental sustainability of the Forest.

### **3.9 Funding Resources Needed and Profile of Funding**

The excel spreadsheets included in Appendix 6 provide a breakdown of the proposed New Forest LEADER budget, showing financial details broken down by both measure and year. The outputs and outcomes for the programme are also included within Appendix 6.

### **3.10 Commitment to Adding Value to the LEADER Programme**

The delivery of the New Forest Local Development Strategy will be supported by additional resources from a number of sources.

New Forest District Council, in addition to fulfilling the role of Accountable Body, will also make its staff resource available to support the LAG and Programme staff. This could include the availability of human resources advice, communications & tourism expertise, as well as the buying power of its central purchasing unit.

Recognising the important role that facilitation and project development play in the delivery of a successful LEADER programme, the New Forest National Park Authority has pledged the support of £5,000 per annum for the length of the programme (subject to Authority approval) to provide additional support to potential applicants. The Authority will also be providing development support for the community elements (objective 4) of the programme through existing staff time up to the value of an additional £5,000 per annum.

Whilst business applicants will be expected to provide their own match-funding, it is anticipated that some of the key charitable organisations in the New Forest will provide match-funding for a number of collaborative projects which will require additional cash resources in the early years of their development.

### **3.11 Commitment to Innovation**

The New Forest LDS will provide an innovative and transferable model to test sustainable development strategies for rural businesses and communities.

Innovation and the development and successful exploitation of new ideas, is central to economic growth, prosperity and sustainability of the land-based sectors and will be the key to the success of the LDS in the New Forest. Our approach will include the transfer of knowledge between different sectors within the area and between LAGs in other LEADER areas

Success for New Forest producers will come from businesses increasing the added-value of their products, processes and services. Innovation through LEADER also plays a critically important role in the New Forest's ability to respond effectively to the challenges and opportunities brought by the changes in agriculture, forestry and related sectors as well as to other major challenges, such as climate change.

In addition, community projects will be required to demonstrate their innovative approaches to both the provision and long-term management of community facilities and resources.

### **3.12 Plans for Co-operation and Networking**

The New Forest LAG is committed to the development of co-operation projects and recognises that developing links with other practitioners is an effective way of disseminating and encouraging the practical use of project information. During the delivery of the LEADER+

programme, the New Forest LAG successfully developed projects with other LAG areas in both the UK and Denmark.

In the new programme, the New Forest LAG intends to focus networking and the development of co-operation projects on the creation of a sustainable wood-fuel supply in Hampshire and the Isle of Wight through the development of links in the supply chain between each partner area. This will be facilitated through:

- The organisation of joint technical events, seminars and workshops to encourage the development of wood-fuel supplies (events and training will be organised through RBAT where appropriate).
- The development of links with Scandinavian countries with well-developed wood-fuel supply chains to enable the transfer of expertise and best practice relating to wood-fuel production and the sustainable management of woodlands.
- The development of innovative marketing strategies to stimulate the wood-fuel market, including the development of a website promoting local wood products.

In addition, the LAG will actively explore opportunities for collaboration with other LAG areas as the programme develops, including potential links with any neighbouring LAGs in the South-West region eg. Cranbourne Chase AONB.

### **3.13 Complimentarity with Other Funding Programmes**

With the exception of the LEADER programme, funding available for rural development within the New Forest is still limited. However there are two potential sources of funding which will complement the proposals for the new programme:

#### *a) New Forest Heritage Lottery Funding*

Over the past 18 months, a partnership of New Forest organisations have been working together to develop a bid to the Heritage Lottery Fund (HLF). HLF have supported the project in the initial stages by providing a project planning grant to enable the partnership to develop its proposals and this will result in a Heritage Grant bid to HLF during 2008. If successful, a variety of activities could be delivered including:

- Education and Accessing the Landscape – education, interpretation and access projects, particularly focussing on education relating to the heritage of the forest, and commoning in particular.
- Conserving and Celebrating the Forest – community cultural activities
- Heritage Skills and Crafts

The Heritage Lottery project will complement the proposed LEADER programme, providing much-needed support for the educational and historic environment aspects of work which will not be supported through LEADER, but are still essential in order to achieve sustainability for the commoning, farming and forestry communities within the New Forest.

#### *b) Sustainable Development Fund (SDF)*

This is a fund administered by the New Forest National Park Authority to support projects which promote or support sustainable living in the New Forest and which further at least one of the National Park purposes.

The fund has some scope to fund businesses, although generally not individual farmers and foresters so has little overlap with the proposed LEADER programme in this area. The short-term nature of the SDF (it can only fund projects for a maximum of one year and which begin and end within the same financial year) also restricts the type of projects that the fund can support.

However, the fund has supported some pilot projects for the “greening” of specific community buildings within the New Forest, which may provide learning opportunities for further community building projects which could be delivered through the new LEADER programme.

### **3.14 Exit Strategy**

One of the main aspirations of the proposed New Forest LEADER programme is to act as a catalyst for practical action to re-invigorate the rural business and community sector. This will not only be achieved through the provision of capital assets for businesses and communities but also through initiatives which will help to develop the capacity of our target groups to effectively manage their activities and access new forms of income, thus ensuring their long term viability.

A detailed exit strategy is included in Appendix 7.

## 4.0 The LAG Partnership

### 4.1 Composition of the Local Action Group

The New Forest Local Action Group (LAG) comprises twenty-two members drawn from the local business sector, agricultural sector, forestry sector, community, government organisations and relevant stakeholder groups. Experience from the current LEADER+ programme has demonstrated that a LAG of this size provides the range of skills and experience required to manage a complex programme such as LEADER, whilst remaining focussed and enabling all members to take an active role in the decision making process.

In order that the New Forest LAG has the diversity of skills and experience required to deliver the new programme and reflects the wider range of stakeholder interests, it has been necessary to actively recruit new members. The New Forest LAG therefore consists of eleven LAG members who have been involved in the delivery of the LEADER+ programme, as well as eleven new members picked for their relevant experience and skills. The individual members of the New Forest LAG are listed in the table in Appendix 8, along with details of their skill areas.

The table below shows the representation of individual stakeholder groups on the LAG and in the following sector proportions:

| Representation of stakeholders groups | Number    | %           |
|---------------------------------------|-----------|-------------|
| Accountable Body                      | 1         | 5%          |
| Business                              | 6         | 27%         |
| Farming                               | 4         | 18%         |
| Forestry                              | 4         | 18%         |
| Sustainable Land Management           | 3         | 14%         |
| Community                             | 4         | 18%         |
| <b>Total:</b>                         | <b>22</b> | <b>100%</b> |

  

| Sector           | Number of Stakeholders | %           |
|------------------|------------------------|-------------|
| Private Sector   | 9                      | 41%         |
| Public Sector    | 7                      | 32%         |
| Voluntary Sector | 2                      | 9%          |
| Community Sector | 4                      | 18%         |
| <b>Total:</b>    | <b>22</b>              | <b>100%</b> |

### 4.2 Structure of the Local Action Group and the Decision Making Group

The New Forest Local Action Group is structured in two tiers – the full Local Action Group (LAG) and the Decision Making Group (DMG).

The activities of both groups will be governed by the New Forest LEADER Terms of Reference for the LAG and DMG, a draft of which can be seen in Appendix 9. This specifies the role and responsibilities of the LAG and the DMG, their membership, the administration and management of meetings including quorums, the election of chair and vice chairs, registering conflict of interests, confidentiality of meetings, data protection and the timetable for the review of the Terms of Reference. In addition it outlines the role of the Accountable Body and LEADER programme staff. Each LAG member will be provided with a copy of the Terms of Reference and will sign to confirm that they have received and understood it.

The LAG is considered to be too large to take on the role of detailed assessment and decision-making relating to project applications. In addition, confidentiality of sensitive information is a particularly important issue for the appraisal of applications from the business sector and is harder to maintain in a large group such as the LAG. Therefore this assessment role will be taken on by the DMG, who will each be asked to sign a confidentiality agreement. Any member found to have breached this agreement will be requested to vacate their position on the LAG / DMG. In addition, the DMG will provide management support to the chair and programme staff.

### **4.3 Role and Responsibilities of the LAG and DMG**

The Local Action Group has the following responsibilities:

- To direct and review delivery and set strategic priorities for the LEADER programme over the period 2008-2013 and to regularly review and evaluate the roles and responsibilities of the LAG and DMG to ensure they continue to meet the needs of the programme as it develops.
- To undertake the first stage assessment of project applications to New Forest LEADER (through the appraisal of expressions of interest) and make recommendations to the DMG through the consideration of the proposals “fit” with the aims and objectives of the Local Development Strategy.
- To stimulate interest in the New Forest LEADER programme, through their contacts with local stakeholder groups and work to ensure there is a co-ordination of activity with other strategies, and to reflect the view of the wider community.
- To foster links with other national and European LEADER projects.

The DMG has the following specific responsibilities:

- To make decisions on the more detailed aspects of implementing the New Forest LEADER Local Development Strategy and to provide support to the Chair and Programme Manager.
- To appraise project applications based on considerations as to their financial viability, identified need, clear targets and objectives, sustainability, innovation, project management capability and delivery, risk assessment and as otherwise guided by SEEDA.
- To make recommendations to the accountable body on project applications and sanction the release of grant offer letters, ensuring that all approved projects provide good value in their use of LEADER funding and follow best practice in all their financial activities.
- To monitor the overall performance of the New Forest LEADER programme against the targets as set out in the Local Development Strategy and assist the Programme Manager in the submission of reports to SEEDA and other funders.

### **4.4 Key Positions**

The positions of Chair and Vice Chairs of the LAG and DMG will be filled by invitation of the LAG members and from one of their number. Elections will be held at the first meeting of each calendar year and there is no limit as to the number of times a Chair or Vice Chair can be elected. The Chairman will be supported by two Vice Chairs elected by Members of the LAG, with at least one being a member of the DMG.

### **4.5 Staffing and Other Resources**

The LAG and DMG will be supported by a small team of core staff (the programme team) who will be employed directly by the Accountable Body. An organogram is shown in Appendix 10 along with the job descriptions for the key LEADER staff in Appendix 11.

It is envisaged that the programme team who have successfully managed the current LEADER+ programme, will stay in post for the new LEADER programme.

The programme team will be responsible for:

- Overall programme management and administration as well as financial administration and submission of funding claims
- Coordinating development and facilitation work
- Providing on-going compliance advice to project operators
- Supporting the LAG in their strategic management of the programme
- Implementation of the LAG's communication strategy
- Maintenance of monitoring and evaluation procedures
- Completion of management and monitoring reports to the LAG and SEEDA
- Liaising with local partners, DEFRA, SEEDA other LAGs and key stakeholders

#### **4.6 Profile of Facilitation Activities and Costs**

Project facilitation activities are seen as key to the successful delivery of the New Forest programme. Experience in delivering the LEADER+ programme has demonstrated a need for support and advice for potential projects, throughout the entire application process. This has been shown to increase not only the number of project applications submitted to the LAG but also their quality and ultimate success.

In order to ensure adequate separation of duties within the staff team, it is proposed that project facilitation be undertaken by external contractors experienced in this area of work, with the contracts managed by the Programme Manager. This will ensure that there is always project development support available as well as being an opportunity to draw on the sector specific skills of different project facilitators without the costs associated with the direct employment of staff. Additional facilitation support will be provided by partner organisations such as the New Forest National Park Authority and Community First New Forest. Facilitation support will focus on those target groups with no or little experience of EU / LEADER funding and in particular the forestry and community sectors.

If necessary, a condition of funding will require applicants to attend relevant training (ie. in business management skills), organised by RBAT or similar, before the LEADER funding will be released.

The costs of the facilitation are shown in the table of LAG partnership costs in section 4.8.

#### **4.7 Administration Processes**

##### **4.7.1 Project Appraisal and Selection**

The process for project appraisal and selection is detailed in Appendix 12.

There will also be a "fast-track" appraisal system for straight-forward projects requiring less than £10,000 of LEADER funding and which the LAG does not consider to be controversial. Details of the process will be developed with guidance from SEEDA.

Project appraisals will adhere to guidance issued by the EU and SEEDA and will include the assessment of:

- Eligibility of the proposed project including a formal recorded check of all eligibility issues using a process provided by SEEDA. This will look at the need for funding, whether there are alternative ways to deliver the same outcomes, and the business and wider impact of the project. It will also assess whether the project is realistic, whether it can achieve its objectives and whether it offers value for money.
- Compatibility with selection criteria set out in the appraisal guidance including an assessment of the capacity of the underlying business / organisation to deliver the project successfully and an assessment of state aid and other regulatory requirements such as planning approval etc.

*NB. If necessary, the LAG will follow SEEDA guidance in all matters relating to the appeals process to enable applicants to seek a review of the handling of their application.*

Following approval by the DMG, a formal funding contract will be issued by the Accountable Body which details the roles and responsibilities of all parties. It will also specify the grant rate, amounts and claim timings/amounts as well as a wide range of responsibilities including administration, record keeping, promotion of Defra/EU funding and what will happen in the event of the applicant not fulfilling the terms of the contract i.e. recoveries. In addition, project operators will receive a copy of a 'project manager's handbook' which will provide guidance on all aspects of successfully managing a LEADER funded project.

All projects will be allocated funding using an appropriate grant rate for the chosen RDPE measure, and within that project staff will apportion and record the Defra/EU/Voluntary modulation funds in the funding agreement, on the paper file and as required by SEEDA. In addition, all successful project applicants will be registered with the Rural Payments Agency.

#### 4.7.2 Payment of Claims Process

- Claims will be closely scrutinised using a standard checklist provided by SEEDA, and which will be used to record all claim payment decisions. Key and ancillary controls will be implemented as required by the RPA/EU.
- Claims will be recommended for payment by a member of the programme team who has the necessary skills & training to undertake this work. They will be approved for payment by a different council officer with the appropriate skills and levels of budget authorisation.
- All claims will be based on receipted invoices and clear evidence of payments in relation to the agreed contract letter. Details of claim irregularities will be recorded and reported as appropriate and if it becomes necessary to undertake the recovery of grant funds, guidance provided by SEEDA will be followed
- Post payment checks will be undertaken on a sample of claims approved by each authoriser. Other checks will be undertaken as guidance becomes available
- Training for project operators on record keeping and submission of grant claims will be provided by programme staff.
- The final 5% (or as recommended by SEEDA) of a grant payment will be withheld until successful completion of project and all obligations outlined in the funding agreement are met by the project operator.

#### 4.8 Costs for Running the LAG Partnership

##### LEADER Costs for the Administration of the LAG and Accountable Body

| Activity               | 2008            | 2009             | 2010             | 2011             | 2012             | 2013             | Total             |
|------------------------|-----------------|------------------|------------------|------------------|------------------|------------------|-------------------|
| Programme manager      | 12034.68        | 49265.14         | 51743.10         | 52295.39         | 53864.25         | 61497.76         | <b>280700.32</b>  |
| Administration support | 1472.44         | 6404.20          | 7096.33          | 6794.22          | 6998.04          | 7207.98          | <b>35973.21</b>   |
| Financial support      | 688.00          | 2750.00          | 2300.00          | 2000.00          | 1850.00          | 2600.00          | <b>12188.00</b>   |
| Project development    | 1600.00         | 18000.00         | 18000.00         | 16400.00         | 16400.00         | 16400.00         | <b>86800.00</b>   |
| LAG facilitation costs | 354.00          | 2377.60          | 1381.74          | 1386.50          | 1391.98          | 1278.27          | <b>8170.09</b>    |
| Communications         | 3800.00         | 6000.00          | 2657.64          | 2674.48          | 2691.71          | 2709.46          | <b>20,533.29</b>  |
| Miscellaneous          | 0               | 5000.00          | 5000.00          | 5000.00          | 5000.00          | 5000.00          | <b>25,000.00</b>  |
| <b>Total</b>           | <b>19949.12</b> | <b>89,796.94</b> | <b>8,8178.81</b> | <b>86,550.59</b> | <b>88,195.98</b> | <b>96,693.47</b> | <b>469,364.91</b> |

#### **4.9 Skills Needed by LAG and Plans for Developing Skills**

The expertise and skills of members of the LAG is detailed in the table in Appendix 13. Individual LAG members were selected for their contribution to the range and depth of skills considered necessary for the successful delivery of the New Forest LEADER programme. However, training will also be provided for all LAG members which will give them an overview and understanding of the LEADER programme and its requirements, as well as the necessary skills to be able to appraise projects efficiently. The LAG has also requested training on project management, monitoring and evaluation and public relations.

This training will be delivered “in-house” where possible by LEADER staff or trainers from partner organisations. However, there is also provision in the LAG facilitation budget for the employment of external trainers where required.

#### **4.10 Timescale for Establishing the LAG**

The LAG in the New Forest has been operational since 2002, delivering the existing LEADER+ Programme. The new members of the LAG attended their first formal meeting in December 2007 and will be given a formal induction and training in project appraisal during early 2008. It is envisaged that the LAG will be ready to receive and assess applications by summer 2008, as well as actively promoting the availability of LEADER funding in the area. Experience has shown that an active and knowledgeable LAG are key to the successful delivery of a complex funding programme such as LEADER. If the New Forest LAG is successful in its bid, many projects will be able to commence rapidly since much of the preparatory work to agree project details with local community members and relevant stakeholders will have already been undertaken by the time the funding is released.

#### **4.11 Delivering Value for Money Outcomes Using LEADER Funding**

Delivering value for money will be critical to the programme and will be achieved through:

- The involvement of the LAG in all aspects of the delivery of the programme. As the members give their time voluntarily, a vast amount of expertise and local knowledge is available freely to the programme.
- The experience of the LAG, Accountable Body and programme staff in delivering similar programmes means that the majority of procedures are already in place.
- All projects will be appraised by the LAG in terms of their value for money by ensuring efficient working practices and low administration and overhead costs.
- Projects will be supported by experienced programme and development staff to ensure they meet their contracted outputs and deliver the project in the most effective way.
- Where appropriate, projects will be appraised on the basis of the number of beneficiaries of the scheme.
- Where appropriate the LAG will give consideration to the multiplier effect of a proposed project – for example supporting a project which may have knock-on benefits for a number of businesses.
- All project applicants will be required to demonstrate that they have followed guidance regarding obtaining quotes and tenders for goods and services.

## **5.0 Accountable Body**

### **5.1 Full Details of Accountable Body**

The New Forest District Council (NFDC) will be the legally Accountable Body for the New Forest LEADER programme and will be responsible for all matters relating to the administration and financial control of the project over the Local Development Strategy implementation period.

Contact details for the Accountable Body are as follows:

New Forest District Council  
Appletree Court  
Lyndhurst  
Hampshire  
SO43 7PA

### **5.2 Functions of the Accountable Body**

#### **5.2.1 Employment of Programme Staff**

Programme staff will be employed by New Forest District Council and subject to the normal terms and conditions of employment. In addition, line management will be provided by the Accountable Body, with technical support provided on an ad-hoc basis by a range of NFDC staff.

The Accountable Body will ensure that programme staff undertake just one of the following activities in relation to an individual project.

- Project appraisal/approval
- Claim recommendation
- Claim authorisation

However staff may perform a range of these duties across a range of projects.

#### **5.2.2 Maintenance of Records**

Records will be kept of budget management authorisation levels and other processes as required by the LEADER managing authorities. All original records will be kept (where they are not the responsibility of project operators) by the accountable body for 6 years from the date of the last grant payment.

NFDC will maintain a register of potential conflicts of interest of both LAG members and programme staff. In addition, records will be kept of all staff training and development activities.

#### **5.2.3 Reporting Procedures**

The Accountable Body will maintain and update information relating to budget forecasts and outputs on databases provided by SEEDA as required. In addition, NFDC will be responsible

for the submission of quarterly progress reports with each grant claim they make to SEEDA and developed in consultation with the LAG

The Accountable Body will make all their records and business processes available for on the spot inspections, routine and compliance inspections and visits by external auditors.

In conjunction with SEEDA, NFDC will undertake an annual review of the performance of the programme, with future budgets adjusted accordingly.

#### **5.2.4 Arbitration**

It is expected that the LAG will deal with management issues as they arise. However, if problems persist, the LAG is able to ask New Forest District Council to act as arbitrators to settle disputes in line with Local Authority procedures and SEEDA guidance.

### **5.3 Financial Arrangements**

Financial management of the project will be undertaken by New Forest District Council (NFDC). Accounts for the LEADER projects will be established as stand alone budgets from which reports can be generated and interrogations made at will by Finance Officers and Programme staff.

NFDC has an internal audit plan comprising a rolling programme of budget audits by service area, and project budgets will be built into this process as appropriate. As a local authority, NFDC is subject to external audit in accordance with standard financial regulations and with a general fund revenue spend of some £24 million for 2007/2008, it is subject to rigorous financial procedures and controls.

### **5.4 Bank Rolling Arrangements**

New Forest District Council will reimburse financial claims submitted by project operators (when submitted according to a pre-arranged timetable and which contain no irregularities) prior to the submission of their own claim to SEEDA. This “bank-rolling” arrangement was used under the LEADER+ programme and was important in enabling small businesses and community groups, who lacked substantial reserves, to access funding.

## 6.0 Identification and Mitigation of Risks

The New Forest LAG has assessed the key risks involved in delivering a successful LEADER programme to be as follows:

| <b>Risk</b>  | <b>Likelihood of occurrence</b> | <b>Impact of occurrence</b> | <b>Actions to be taken to mitigate risk</b>   |
|--|---------------------------------|-----------------------------|---|
| Loss of key programme staff  | Medium                          | Medium                      | <ul style="list-style-type: none"> <li>▪ Encourage personal development and provide training opportunities for project staff</li> <li>▪ Ensure employment of high quality programme staff</li> <li>▪ Ensure that all programme staff have an overview of the whole programme and are involved in decisions taken.</li> </ul>  |
| Lack of projects coming forward due to lack of engagement with key communities   | Medium                          | High                        | <ul style="list-style-type: none"> <li>▪ Ensure proactive promotion of programme within key farming, forestry and business sector groups.</li> <li>▪ Ensure active involvement in LAG by representatives of each sector, who then promote programme to their own sector.</li> </ul>   |
| Applicants not submitting full application due to bureaucratic process and amount of resource and skills required to complete application. | Medium                          | High                        | <ul style="list-style-type: none"> <li>▪ Ensure adequate development support is available to guide applicants through the process and support the development of applications.</li> <li>▪ Ensure process is made as simple and as easily understandable as possible.</li> <li>▪ Provide quick response to queries and requests for assistance.</li> </ul>   |
| Confidentiality issues discourage businesses from submitting applications  | Low                             | High                        | <ul style="list-style-type: none"> <li>▪ Ensure appraisal and approval process is clear and transparent and understood by potential applicants.</li> <li>▪ Ensure that business information is assessed by the lowest number of LAG members necessary, all of whom understand the confidential nature of the information and whom are signed up to a confidentiality clause. eg. the DMG</li> <li>▪ Ensure that conflicts of interest are registered and are taken seriously</li> </ul> |
| Projects fail to deliver project / agreed outputs  | Medium                          | Medium                      | <ul style="list-style-type: none"> <li>▪ The project appraisal process will assess the skills of the applicant to deliver the project, how realistic the business plan and proposed outcomes are.</li> <li>▪ Project applicants will be supported by experienced staff, who will monitor their progress and address issues as they occur.</li> </ul>  |

## **7.0 Publicity and Communication Strategy**

An important element of the Local Development Plan is to communicate the availability of funding and experience of the project to all relevant parties. To this end, all communications activity will be undertaken within the framework of a Communications Strategy which details the mechanisms to be used.

In addition, a checklist for project operators will be available in the project managers handbook to assist with this process and ensure operators meet their obligations with regard to the use of logos etc.

Experience in delivering other EU funded projects has shown that in the New Forest one of the most powerful (and cost effective) communication methods is via word of mouth. The LAG will be instrumental in the development of this communication method, utilising their large number of personal and stakeholder contacts. In addition, the LAG already has well established links with the local and regional media and will utilise this to the best advantage. Throughout the programme, innovative publicity opportunities will be explored and used where possible.

All communication and publicity will be undertaken in accordance with the relevant Commission Regulation and guidance from SEEDA, as will the use of logos etc. In addition, all communication activity will be scrutinised for its value for money in terms of its purpose and the ability to reach target groups.

The Communications Strategy will be reviewed regularly. Its effectiveness will be evaluated alongside national and local programme objectives. Assessment will come from quantifiable feedback such as website visits, project enquiries and event numbers. In addition, qualitative research will take place to ensure that the right messages are reaching their intended audiences.

### **7.1 Communications Strategy**

The New Forest LEADER Programme will be delivered by the New Forest Local Action Group (LAG), assisted by New Forest District Council (NFDC) acting as Accountable Body.

This Strategy will be shared by the LAG and NFDC (the Accountable Body) during their delivery of the LEADER Programme. Each of the project operators will have their own communications plan aimed at their specific target audience, and identified in their application. However, all communication activity will serve to promote the achievements of LEADER, in a local, national and EU context.

#### **7.1.1 Aim**

The aim of the Communications Strategy is to:

- ensure that the Programme is publicised effectively and transparently, so that all potential New Forest beneficiaries are aware of both it and the SEEDA/EU contribution;
- encourage the submission of high quality applications that deliver a range of public benefits in a cost-effective way; and,
- help keep processes simple and easy for our target audience to understand.

### 7.1.2 Target Groups:

- the general public
- beneficiaries of funding ie. those in the farming, forestry, micro-businesses and community groups
- managing authorities and other funders
- organisations supporting the voluntary and community sector in the New Forest
- organisations supporting the land based and micro-business sector in the New Forest
- environmental organisations in the New Forest
- local elected representatives

In addition, information will be shared with other LAGs in the UK and the EU.

### 7.1.3 Content and Strategy

#### a) Dissemination of information to potential beneficiaries

The wide ranging sector knowledge of the LAG will ensure that the most effective communication channels are used to promote LEADER and examples are detailed in the table below:

| Farming   | Forestry  | Micro-businesses  | Community   |
|---|---|---|---|
| Promotion through: <ul style="list-style-type: none"> <li>▪ NFU</li> <li>▪ CLA</li> <li>▪ Commoners Defence Association</li> <li>▪ New Forest Produce Ltd</li> <li>▪ Hampshire Fare</li> <li>▪ New Forest Livestock Society</li> <li>▪ National Park Authority</li> </ul> | Promotion through: <ul style="list-style-type: none"> <li>▪ Forestry Forums</li> <li>▪ Deer Management Society</li> <li>▪ British Association of Shooting and Conservation</li> <li>▪ Local branches of the Forestry Contractors Association</li> <li>▪ Royal Forestry Society</li> <li>▪ Coppice Association and Hants Coppice Group</li> <li>▪ Forestry Commission contractors list</li> <li>▪ TV Energy</li> </ul> | Promotion through: <ul style="list-style-type: none"> <li>▪ New Forest Business Partnership</li> <li>▪ Federation of Small Businesses</li> <li>▪ Business support agencies</li> <li>▪ New Forest Produce Ltd</li> <li>▪ New Forest Tourism</li> </ul> | Promotion through: <ul style="list-style-type: none"> <li>▪ Parish and District Councils</li> <li>▪ Community support agencies (EG. CVS, VIRSA)</li> <li>▪ New Forest Consultative Panel</li> <li>▪ New Forest Association</li> </ul> |

Detailed information about the New Forest LEADER Programme will also be provided in promotional and guidance literature. This will be available to all who request it. Where appropriate this will be delivered directly to the key target audience for the programme eg. through promotional mail-outs, personal contact etc.

Comprehensive information on the financing opportunities provided by New Forest LEADER and the contribution from SEEDA/Defra and the EU will be available on our website. This will include detailed information about the schemes on offer, along with information about where to obtain details about all aspects of the programme.

All beneficiaries of the programme will receive, as part of the notification of their award of the assistance, information explaining that the grant is being financed from a programme part-financed by Defra & the EU Community.

## **b) Dissemination of Information to the Public**

The LAG will inform the public of the programme's progress in delivering its objectives, the main achievements in implementation and its closure. This will be done in a variety of ways including, though not restricted to, information available through websites, newsletters, information releases to the relevant media, attendance at agricultural and rural shows and personal communication by LAG members and programme staff.

## **c) The Content of Scheme Guidance and Publicity**

The literature for the New Forest LEADER Programme (web-based and hard copy) will include clear and detailed information (which will be updated regularly) on the following:

- i) the administrative procedures to be followed in order to qualify for funding under the Programme;
- ii) a description of the procedures used for appraising applications for funding;
- iii) the eligibility conditions and/or criteria for selecting and evaluating the projects to be financed; and
- iv) the names of persons at a local level who can explain the way the programme works and the criteria for selecting and evaluating the projects.

Where a project financed by New Forest LEADER results in an investment (e.g. on farm or on food enterprise) whose total cost exceeds EUR 50,000, the beneficiary will place an explanatory plaque in a suitable place. These will carry a description of the project/activity and the European flag with an explanation of the Community's role as well as the Leader logo.

## **8.0 Monitoring and Evaluation Proposals**

### **8.1 Overall Programme Monitoring**

New Forest District Council (as Accountable Body) will be ultimately responsible for the overall monitoring of the New Forest LAG and the implementation of the Local Development Strategy. This work will be carried out by the Programme Manager on behalf of the LAG. Progress reports will be produced as agreed with SEEDA.

### **8.2 Monitoring of Programme Administration and Local Action Group**

The Programme Manager will be monitored by the LAG, but is ultimately responsible to the Accountable Body. The successful delivery of the New Forest Local Development Strategy will be the main output and indicator for performance measurement. In addition, the LAG, including the DMG, will periodically review its performance and membership to ensure that it remains representative of the area and of project aspirations.

Monitoring of financial management procedures will be carried out by the New Forest District Council audit team.

### **8.3 Monitoring of Project Activity**

The requirements for ongoing reporting of project activity will be agreed with project operators prior to the agreement being issued. The detail and frequency of reporting will depend on the size, nature, perceived risk and complexity of the individual project.

It is anticipated that routine inspections, in conjunction with the submission of monitoring reports etc, will enable programme staff to quickly identify projects which may fail to meet their planned outputs. These projects will be supported by programme staff to ensure that they achieve a successful outcome and negotiate variations to their projects where this is necessary.

All projects will be required to submit an end of project report, which will bring together their monitoring and evaluation outputs as well as lessons learnt and examples of communication activity. All projects will be required to maintain a detailed paper based project file on which all papers, decisions, correspondence etc are kept and maintained in good order and archived for 6 years from the date of the last grant claim payment.

Monitoring of all aspects of the project delivery (including claim procedures) will be undertaken by the DMG (in consultation with the LAG). This will include:

- Six monthly reports on the implementation of the Local Development Strategy using agreed indicators
- Individual project monitoring – this is likely to include an internal audit system to check all procedures and individual project technical and financial reports.
- Monitoring of the LAG – regular review meetings will be designed to iron out any problems as they arise. However, if problems persist, New Forest District Council will be asked to intervene and will settle any disputes in line with Local Authority procedures and LEADER guidance.
- Community feedback on the overall implementation of the Local Development Strategy – this will be gained from the LAG and through community consultation.
- Guidelines for project monitoring will be developed with the LAG and will be included in the Project Operators Handbook.
- An external audit of financial procedures will be carried out periodically by New Forest auditors.

### **9.0 Equal Opportunities and Diversity**

Equal opportunities in relation to the operation of the New Forest LEADER programme primarily cover two main areas; equality of opportunity in employment and equality of opportunity in service provision.

#### **9.1 Equality of Opportunity in Employment**

New Forest LEADER is committed to equality in recruitment, selection, training, career development and promotion regardless of sex, marital status, race, religion, colour, age or disability, both for its own programme staff and for those projects it funds.

- All project applicants which intend to employ staff will be required to demonstrate how they will put this into practice and specifically that recruitment has been undertaken with due regard for openness and fair competition.
- New Forest LEADER will take seriously any allegations of discrimination levelled against those projects which it funds.

- All New Forest LEADER staff will be subject to the equal opportunities policy of New Forest District Council.

## **9.2 Equality of Opportunity in Service Provision**

New Forest LEADER will seek to ensure that all the people within the Programme's target area, irrespective of their age, disability, ethnic, cultural or religious background, gender, marital status or sexual orientation have equal access to, and quality of, service which will be provided to a consistently high standard. Specifically:

- The LAG will continue to involve the wider community both through the community representation on the group and by widely publicising the LEADER programme. This will be carried out using a variety of mechanisms outlined within the Local Development Strategy.
- That all potential applicants have equal access to support and advice throughout the project development process.
- That all project applications will be appraised through an equitable and transparent appraisal process.
- That those involved in the appraisal process will declare a conflict of interest or financial interest where applicable.
- All projects will be required to show that they comply with the provisions of the Sex Discrimination Act 1975, the Race Relations Act 1976 and the Disability Discrimination Act 1995 (as amended).

## 10.0 Self-Scoring Application

The New Forest LAG have self-scored their application as follows:

| Section  | Score     | LAG Comments on Scores less than 4   |
|--|-----------|--|
| 1. Appropriateness of the Partnership                | 4         |  |
| 2. Coherence of the Area                             | 4         |  |
| 3. Quality of the Local Development Strategy         | 4         |  |
| 4. Financial and Administrative Capacity             | 3         | <i>Whilst the accountable body has the necessary skills and resources to manage LEADER funding (as it did under LEADER+), until processes are more clearly defined at a later stage, resources cannot as yet be fully assigned</i>   |
| 5. Fit With National Programme Objectives            | 4         |  |
| 6. Integration of Sustainable Development Principles | 4         |  |
| 7. Commitment to Integration Across the Three Axes   | 4         |  |
| 8. Commitment to Co-operation                        | 3         | <i>Whilst the LAG is fully committed to co-operation and is aware of the benefits that come from these activities, it is keen to support only those co-operation projects which bring clear and demonstrable benefits and outcomes to the New Forest and its prospective partners.</i>   |
| 9. Alignment with Regional and Local Strategies      | 4         |  |
| 10. RDPE Funding Addresses the Needs of the Area     | 3         | <i>There are some local needs which cannot be addressed by RDPE, such as the high cost of housing and land, however LEADER partner organisations will seek to address these issues through other initiatives.</i>  |
| 11. Skills   | 3         | <i>The LAG has proven knowledge of our target sectors as well as many other skills; however there new LAG members who will need training on subjects such as project management. This will be addressed early in the new programme.</i>  |
| 12. Maintaining Momentum / Exit Strategy             | 3         | <i>It is difficult in a LDS, covering a wide range of initiatives, to create an exit strategy which adequately addresses the different methods by which sustainability and long term viability of individual projects will be addressed. For this reason the LAG will consider these issues on a case-by-case basis during the appraisal of individual project applications.</i> |
| <b>Total:</b>  | <b>44</b> |  |

## 11.0 Powerpoint Presentation

A copy of the presentation prepared by the New Forest LAG is included in Appendix 15