

Project Proposal Template

1. Project Number **2020/01**

2. Summary

2.1 *Title*

Lodge Park Bridgeman Restoration Project

2.2 *What will the project do?*

The project will restore a large proportion of a historic landscape as laid out by Charles Bridgeman in the late 1720s. The survival of a “Bridgeman” landscapes is rare due to their frequent reworking by later landscape designers. The original design for the landscape was found in the Bodleian Library in 1998 after having been incorrectly linked to another landscape. This confirmed that the Bridgeman design was largely followed providing a unique opportunity to restore one of our rarest historic landscapes. This is a project of international importance.

The project will achieve this by the planting of avenues and woodland blocks along with drystone wall restoration, all in accordance with the original design. Across an area of 51.5 hectares the project will plant more than 4,100 shrubs and small trees and 227 trees of at least 1.5m. It will restore 170m of historic wall and 2.5km of hedgerow

2.3 *Current stage and extent of development*

This is a proposal from the National Trust for the Landscape Enhancement Initiative (LEI). A National Grid programme to mitigate the impact of their power lines in protected landscapes. In terms of the LEI this project is at the expression of interest (EOI) stage though it forms a component of a more fully worked up longer term National Trust project.

2.4 *Timescale*

Note. The current understanding is that there will be a new “window” (LEI term for bidding round) in June 2020 for a new cycle of funding. We were originally going to submit to the January 2020 window but we have already applied for virtually all of our allocation from the last cycle so submitting an EOI for the June window means we can apply for more for this project. None of this takes account of C19 and no updated information is currently available. We have agreed with the National Trust that under these circumstances the best course is to prepare an EOI for me to take through our internal approval processes so we are ready for June if necessary. It also means that we are ready to submit at a later date if things change. Consequently the timescales below are provisional.

Start and end dates of development

Based on the timescale of earlier June windows.

EOI submitted in June 2020

Full Application late July to late September 2020

National Grid and Ofgem assessment and approval processes October 2020 to May 2021 (experience indicates that this may take longer)

Yes they really do give you 2 months to complete a full application and then take 8 months or longer to decide.

Start and end dates of delivery

October 2021 to October 2024 followed by a 3 year maintenance period (in accordance with the LEI scheme)

2.5 *Who is involved?*

Name of officer proposing the project.

Simon Smith Development and Special Projects Officer

Supporting the project through the application process and monitoring delivery if successful.

Name and involvement of other officers.

Mark Connelly, Land Management Officer. Checking proposal in terms of compliance with Board land management policy and practice

Ann Wyatt, Head of Finance. Oversight of financial monitoring and claims if successful.

Amanda Pressland, Office Manager. Detailed processing of financial monitoring and claims if successful.

Name and involvement of key partners.

National Trust

The project proposer and delivery partner. Only the Board can apply to the LEI for the Cotswolds area so subject to internal approvals we are proposing this project on their behalf. The National Trust will be undertaking all the detailed work of project development and all of the project delivery.

Nature and extent of volunteer involvement.

National Trust volunteers are already active on the site and will be playing a significant role in the project's delivery. No additional call on the Board's volunteers is envisaged. Though in practice they are often the same individuals wearing a different coloured fleece!

3. **Fit**

As well as a brief description include a score of between 1 and 5 for sections 3.1 and 3.2 where 1 is poor and 5 is excellent

3.1 *Fit with Management Plan outcomes; 5*

This project supports many of the outcomes in the Management Plan, in particular;

Outcome 1: Working Together

Outcome 4: Landscape & Geology

Outcome 5: Local Distinctiveness

Outcome 8: Historic Environment & Cultural Heritage

Outcome 9: Biodiversity

Outcome 13: Access and Recreation

Outcome 14: Health and Well-Being

3.2 *Fit with Board's Ambitions and priorities; 4*

This project offers an opportunity to further develop an important local and institutional partnership.

An issue that is regularly brought up in Board and Executive meetings is the need to care for both natural and cultural heritage. This project offers a wonderful opportunity to do both in an integrated way.

3.3 *External permissions and approvals required*

Permissions and approvals are not required at the EOI stage. Ideally they should be secured when the full application is submitted or as soon as possible afterwards. Funds will not be released without the permissions being secured.

The partner is the landowner and has an excellent relationship with the tenant grazier.

The site is listed within the Register of Historic Parks and Gardens as a grade 1 historic park. Its listing can be viewed here;

<https://historicengland.org.uk/listing/the-list/list-entry/1000770>

The Natural Trust have already consulted with Historic England and are actively checking for a pursuing the appropriate approvals.

4. Finance and resources

4.1 *Development funding*

Funders & est. income

No cash funding required

Partner funding

No cash funding required

4.2 *Delivery funding*

The Board is contributing no cash from its own budgets towards this project,

Funders & est. income

LEI £200,000

Partner funding

National Trust £39,500

4.3 *Development cost;*

Fit of development effort within officer capacity

The EOI is virtually complete. The full application will require development time and the LEI has proved to be a demanding funder in terms of their application process. This has been discussed with the National Trust and assurances received that they will do all of the development work and respond to follow up enquiries in a timely manner. The quality of their EOI and supporting documentation gives confidence that this will be the case.

Estimated expenditure and items for budget

No cash expenditure

4.4 *Delivery cost;*

Fit of delivery effort within officer capacity

We will not be directly delivering the project but we will be monitoring delivery and processing claims with the funds passing through our accounts. LEI will not fund delivery partners directly. The financial and operational management and reporting effort required will depend on the quality of the National Trust's project management. Again assurances have been sought and received.

Estimated expenditure and items for budget if successful

£200,000 will be spent via Board budget's over the life of the project, fully funded by the LEI. There will be "Lodge Park LEI" income and expenditure lines.

4.5 *Overall impact on the Board's budget (general fund)*

Include a summary of project budget balances

<i>For any development</i>	none
<i>Estimate for delivery if successful</i>	none

4.6 *Impact on cash flow*

We will be holding funds in our accounts before paying them onto the National Trust so any impact on cash flow will be positive. In practice this interval will be very short so any benefit will negligible. There will be no negative cash flow impact.

5. Risk and benefits

5.1 *Significant risks associated with the project and proposed mitigation (Brief description not a full risk register)*

There is always a risk that a funder will not approve an application at either stage. In this case there is an extremely strong fit with the funder's requirements. A nationally important landscape restoration project in close proximity to an eligible power line. If approved it would also be the first (of four) applications we have taken to this scheme which directly screens the

lines from a public space. In the view of the Board's Development Officer this is our strongest project yet for this scheme.

The LEI has proven to be demanding in terms of the application process so it is reasonable to expect the claiming and reporting to be similarly detailed and rigorous. We already have 3 schemes held up at two stages within the LEI system due to C19 (2 with Ofgem and one just approved to go to Ofgem) so there is a risk to our administrative capacity in adding a fourth. The organisational ability of the partner to provide timely and rigorous claims for us to forward is critically important in us deciding to proceed. This has been discussed in a very frank manner with the National Trust and suitable assurances received.

5.2 *Risks associated with deciding not to pursue the project*

There are significant reputational risks in not taking this project forward.

This project was turned down for a previous window due to the limited funds available. It was agreed to inform them that they were "first reserve" for any future window if more funds became available. At the time it was in case another of our proposals failed freeing up part of our allocation. Not taking this proposal forward now more funds are expected to be available would be difficult to defend within this context.

The National Trust have already discussed this proposal with contacts on the National LEI Board where there is some excitement over it. If we did not take it forward it would raise difficult questions for us within the scheme nationally.

Not taking the project forward would greatly harm a strategic local partnership at a time when we have a renewed focus on partnership development.

The details of this scheme and proposal are in the public domain. It would be difficult to defend a decision to fail to attract these landscape conservation funds to the AONB. This is particularly in the light of the exceptionally strong fit with the funder's requirements and the delivery partner's commitment to do the detailed development and delivery work. It would raise the question; why are we here?

5.3 *Main benefits (brief description)*

Attracting funds to such an important project offers significant public relations opportunities.

We have an opportunity to demonstrate excellent partnership working in a practical way with a strategic partner. Officers and volunteers between the two organisations already have a positive relationship. Supporting this project with significant funding would build on this relationship at the institutional level.

Supporting an outstanding project that combines natural and cultural heritage to deliver work of international importance. This project will have a long lasting legacy benefiting both people and natural and cultural heritage. Just imagine visiting it in 20 years' time.

6. Guidance

6.1 When to use

- When a specific project proposal or its development is likely to lead to a change in the work programme
- When a specific project proposal or its development is sufficiently worked up to include in the work programme (typically expression of interest stage)

6.2 Where to use

- When introducing a new project proposal to the Executive Committee through a paper.
- When seeking approval electronically to pursue a new project proposal from the Chair, Vice-Chair and Director when timescales do not permit a paper to the Executive Committee. Subject to delegated authority.
- When introducing a new project proposal to the Executive Committee via the external bids update.

6.3 Approval

- Prior to the template being used for any of these purposes a draft should be circulated to the Project Development and Special Projects Officer, Finance Officer and Chief Executive and approval sought from the Chief Executive before proceeding.