

Scottish Natural Heritage

Audit and Improvement

Improvement: SNH's engagement with the Moorland Forum



Scottish Natural Heritage
Dualchas Nàdair na h-Alba

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Improvement: SNH's engagement with the Moorland Forum

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MANAGEMENT SUMMARY

1. The Moorland Forum is meeting many of the aspirations of its members but it will need to develop further if it is to continue to support a sustainable future for moorland through collaborative work.
 - Members feel that among the greatest achievements of the Forum was that it had brought together groups that had traditionally been in conflict with one another. Some also valued the opportunity to network, share knowledge and to have their voice heard.
 - The Forum has the potential to be more influential with Government.
 - The Forum could be structured with the
 - main Forum (approximately 30 members) meeting 3 times a year to maintain relationships, allow knowledge exchange and give overall direction;
 - sub-groups (approximately 5-10 members) set up to look at specific topics, commissioned by customers; and
 - practitioner meetings with both sharing good practice events for land managers and events to encourage young people into upland careers.
 - Funding should be based on service level agreements so that the Moorland Forum knows what is expected of it and what its deadlines are and its customers know how much they will be paying.

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SCOPE

1. The exercise considered the historic relationship between SNH and the Moorland Forum and the opportunities for the future, including:
 - a. An overview of the achievements of the Moorland Forum and how they relate to its aims and that of its constituent members;
 - b. The scope of the Moorland Forum and its business model;
 - c. The subject areas and the membership of the Forum;
 - d. Governance, including ways of working;
 - e. The funding model for the Forum; and
 - f. Future needs of public bodies for engagement with key stakeholders and how best this can be achieved.
2. Although the exercise was originally commissioned by Ron Macdonald, Head of Policy and Advice, it may also be used by the Moorland Forum to help develop their future business model.

BACKGROUND

3. SNH has supported the Moorland Forum since its inception in 2002. The Forum is made up of 30 members including sporting, agricultural and conservation NGOs as well as government agencies. Its aim is “to have a sustainable future for moorland through collaborative work.¹” The Forum has worked to improve understanding of the issues of raptor/game-bird conflict, muirburn and land management amongst other things. It has also sought to build a sound evidence base which is accepted and used by all members.
4. This exercise was set against the background of the recent reduction in grant in aid to SNH and the need to ensure that the organisation continues to work with and focus on key partners to safeguard and enhance Scotland’s natural heritage.

¹ www.moorlandforum.org.uk

5. The exercise was based on interviews with 14 members of the Moorland Forum and with SNH staff. ANNEX 1 - ACKNOWLEDGEMENTS contains a list of those interviewed.

RECOMMENDATIONS

6. Table 1 gives an overview of my recommendations in the form of an action plan based on the main findings, which are explored in greater detail in the main body of the report. I am happy to provide more detail on request. I have left the timescales blank so that they can be proposed by the Lead Managers. You can go directly to the appropriate section of the report by pressing Ctrl and clicking the left mouse button over the shaded paragraph numbers.
7. These recommendations are just that. The recipients of this report remain free to act upon them or not as they see fit.

Table 1. Action Plan

	Recommendation	Lead	Management Response	Timescale
1.	SNH should continue to fund the main Forum which would continue to meet 3 times p.a. (para 17)			
2.	Individually funded sub-groups should deliver projects for customers with funding based on service level agreements (para 18)			
3.	The Forum should place renewed emphasis on working with land management practitioners and on encouraging young people to work in upland management.(paras 21 - 24)			
4.	In order to capture input from one of the few major business interests not represented, the Moorland Forum should consider inviting a representative of the renewables industry to present to the Forum (para 27)			
5.	The Forum should maintain an independent Chair and Secretariat and that the service provided by the secretariat should be set down in the terms of a service level agreement (para 35)			
6.	The Forum secretariat should publish a brief statement of the selection criteria for the sub-groups and the Chairman's Working			

	Recommendation	Lead	Management Response	Timescale
	Group to ensure that the selection process is better understood (para 36-37).			

DETAILED FINDINGS

8. I have broken the report down under the points described in the scope.

Overview of the achievements of Moorland Forum

9. I spoke to 14 members of the Moorland Forum and asked them what they saw as the main achievements of the Forum and how they related to its aims and those of the organisations represented.
10. Every member interviewed felt that among the greatest achievements of the Forum was that it had brought together groups that had traditionally been in conflict with one another. Whilst members agreed that conflicts still exist, there was a consensus that there was at least some willingness to work together.
11. Many members valued the opportunity to network (7/14), share knowledge (8/14) and in some cases simply to have their voice heard (5/14). However, whilst members see the value of getting different interests around the table, many feel it is becoming increasingly difficult to justify the cost of staff time to attend meetings. Without tangible, relevant products some members indicated that they are likely drop out of the Forum. Indeed without such outputs and given the reductions in its own Grant in Aid, it has become increasingly difficult for SNH to justify its level of funding of the Forum.
12. Indeed whilst some felt that the opportunity to brief and influence Scottish Government was an important benefit to being part of the Forum, a similar number questioned whether the Forum was effective at doing so.
13. Overall I feel that maintaining dialogue between the various interests has been an important step in managing Scotland's uplands. However, this loose alliance can only be maintained if the Forum tackles projects with measurable criteria of success.

Scope of the Moorland Forum and its business model

14. There was unanimous recognition that the scope of the Forum has moved from purely moorland to a wider consideration of upland issues. This was seen as a positive move by almost all interviewed. Whilst breadth of view is advantageous to the Forum, enabling it to consider many topics, it will be beneficial if it confines itself to a small number of topics at a given time.
15. This combination of breadth and focus is already achieved to a degree using the Forum's existing structures. Wider discussion is encouraged in the full forum meetings held three times per year. Sub-groups are set up to look at

individual subjects in more detail and there are also occasional field meetings, generally combined with one of the full forum meetings. At present, the operating costs are all met from a combination of SNH's grant, funding provided by the members to meet the Chairman's costs and time given up by the member bodies. This way of working does not appear to be sustainable in the long term and the Moorland Forum needs to operate in a way that enables them to recover their costs.

16. The next section describes in more detail how the business model might work.

Business model

17. I accept that there is value to SNH and to the members themselves in continuing to have regular full Forum meetings and that three times a year is probably the ideal frequency. Since the benefits of operating the full Forum are difficult to quantify, it would be difficult to set up a business model that could stand on its own feet. However, if we accept that the Forum does perform a useful function in improving relations between members and that improved relations help SNH and Scottish Government to achieve their objectives for the uplands, **then I recommend that there is merit in continuing to support the Forum financially with a maintenance grant.** In order to give the Forum a degree of stability, it would be beneficial if funding could be agreed over a period of three years or so, tied to a business plan with targets and objectives.
18. By contrast, the sub-groups do have the potential to be more or less self-supporting, at least assuming they are able to borrow members from the main Forum. The main questions are how should the sub-groups work and what should they discuss?
19. Whilst the Forum should maintain independence, it will have to work more closely with Scottish Government and SNH to ensure that it focuses on matters that they are interested in, and by extension, are willing to pay for. This is a two way relationship, the Moorland Forum will initially have to be very proactive in finding out what Government and SEARS bodies need to know. Equally, all parties will have to agree defined outputs with timescales and performance measures. Using such 'SMART' objectives will help to put the Moorland Forum on more of a business footing and will help ensure that Forum members know what is expected of them. Doing so will also dispel any notions that the Forum is a talking shop.
20. **I therefore recommend that future Moorland Forum sub-groups should be funded based on service level agreements.** These agreements will be with Scottish Government, with SNH and with other customers and allow each party to understand what will be delivered and at what cost.

Practitioner events and sharing good practice

21. Whilst many member organisations have direct land management experience, most of the individuals representing them come from a management or academic background. Many of the member bodies employ practitioners to manage uplands and I believe there is an opportunity for these practitioners to get together to share good practice and pool information. This will help translate the good work of the Forum into real gains on the ground. It will also be an opportunity to field test new guidance on the people who will have to follow it. That way, there is more chance of producing guidance that is fit for purpose rather than theoretical documents that are impractical to use.
22. The events could be funded as part of larger commissions to look at specific topics and the field-testing would form part of the quality assurance process. There may also be occasions when it is more cost-effective for SNH or other bodies to get the Forum to organise and carry out practitioner events for them. SNH may wish to consider the opportunities for tying in some of its existing Sharing Good Practice events.
23. Several interviewees expressed concern about the number of young people entering into upland management. SNH has carried out schools days in the past but given its broad membership, there may be an opportunity for the Moorland Forum to develop and deliver events that show all the aspects of modern upland management. There may well be scope to work with the Royal Highland Education Trust, which has been looking to expand its role into wider countryside matters, and further education colleges (e.g. North Highland College, Borders College) which would create a steady income stream for the Forum.
24. **I recommend that the Forum places renewed emphasis on working with practitioners and the Forum should consider ways to encourage young people to work in upland management.**
25. The Forum has already built up an impressive array of data on upland issues. Whilst, it is a good thing that the members have access to these data sets and that there is agreement on many of the facts, there is an opportunity to disseminate them more widely. The recent coverage of the Upland Solutions report² shows that information can reach the regional press. Some members saw the role of Moorland Forum as promoting moorland and open ground in a similar way to that in which the Forestry Commission promotes woodland. However it must be born in mind that the Forum has limited resources and it is probably only feasible to issue targeted press releases occasionally.

Subject areas and membership of the Forum

26. Several interviewees commented on the need to keep the number of members to a manageable number and some even felt that 30 was too many for the Forum to be effective. However, interviewees recognised that not all upland stakeholders were represented on the Forum and there was some

² E.g. [Article in Press and Journal 23 August 2011](#)

debate about which interests could be invited to join or at least present to the Forum.

27. Given its economic importance, it is perhaps unsurprising that the majority of members interviewed (10/14) could see a role for a representative of the renewable energy industry. Whilst it can be argued that the ultimate decisions about renewable development lie with individual landowners, many of the debates about renewables in the uplands touch upon the remits of the existing members of the Moorland Forum, including water quality, raptors and wild land. Informed debate on the subject may well help the industry to work in partnership with its upland stakeholders. **I therefore recommend that the Moorland Forum should consider inviting a representative of the renewables industry, such as the Scottish Renewables Forum or Renewable UK, to present to the Forum. Based upon the success of the meeting, they may wish to extend an offer of membership.**
28. Half of respondents wished to have greater discussion of the impacts, both positive and negative, of woodland expansion on upland habitats, agriculture and sporting interests. Given that the main interested parties are already members of the Forum, it would remain to be seen if SNH, FCS or the Scottish Government wished to commission research on this topic, although the FCS may have already signalled its intended direction by setting up the Woodland Expansion Group.
29. Members raised a number of other possible topics for discussion: water management, peatland, climate change and reintroductions. However I would suggest that the Forum would be best advised to concentrate on a small number of topics at any given time and thus produce a small number of tightly focused outputs rather than spread itself too thinly over a wide range of subjects. It is of course entirely possible that Scottish Government or a public or commercial body may be interested in the Moorland Forum's views on any of these matters, in which case the Forum would be able to set up a sub-group to develop a report.

Other Groups and Forums

30. Interviewees also proposed recreation and access and deer management as topics. Both of these topics have existing forums and it is outside the scope of this report to suggest possible mergers. However, interviewees in this and a previous exercise³ have commented on the difficulty in justifying the expense of attending multiple forums, particularly in the current economic conditions. This is compounded by the feeling that most of the attendees are "the same old familiar faces". Other groups with overlapping membership include the Upland Ecosystems Group and the Deer Management Round Table.
31. There is a clear appetite for reducing the number of forums or at least making them sub-groups of Moorland Forum. They could operate with one secretariat (and one database of members etc.) and hence reduce the difficulties of

³ Internal Consultancy (2010) The future role of the Biodiversity Implementation Team (BIT) B909287

coordination and thus cost. This would also reduce the “forum fatigue” felt by some members

32. There was some discussion of the Langholm Moor Demonstration Project. The general feeling was that the Langholm Project is now functionally fully independent, with its own project board, and that any role for the Moorland Forum can safely be left to periodic updates on progress.

Governance and ways of working

33. When it was set up, the Moorland Forum was funded by SNH, chaired by an SNH Board Member and had its secretariat provided by SNH. Although individual members acted in what they must have considered as their organisations’ interests, there was apparently a feeling that SNH very much set the agenda. Although still largely funded by SNH, the Forum now has a chair and secretariat that are independent of SNH and sets its agenda based on the concerns and interests of its members. Most members and indeed SNH staff, felt that overall this had increased the credibility of the Forum.
34. The majority of Forum members consulted were full of praise for both the secretariat provided by the Heather Trust and for the way the chairman fulfils his role. There was widespread recognition that the roles were not always easy and that the post-holders discharged their offices with a high degree of professionalism.
35. A small minority commented that the secretariat’s costs were relatively high. Two members felt that SNH should take back the function of secretariat but the majority seemed to value having a body that is independent of SNH in the role. It was also suggested that costs could be reduced by rotating the secretariat role amongst the members, perhaps by allowing members to tender competitively. However, I feel that this could lead to a loss of independence and reduce the consistency and quality of service. **Overall I recommend that the Forum should maintain an independent Chair and Secretariat and that the service provided by the secretariat should be set down in the terms of a service level agreement.**
36. The operation of the subgroups was felt to be effective. Interviewees did recognise that the subgroups usually covered a broad range of viewpoints on the topic to be discussed but nearly half of respondents (6/14) commented on a lack of transparency over who was included in the sub-groups. It is hard to comment on the extent to which this hampers their operation **but I recommend that the secretariat should publish a brief statement of the selection criteria to ensure that the selection process is better understood.**
37. In order to plan agendas and so forth, a Chairman’s working group – typically 8-10 members - meet in advance of main Forum meetings. The work of this group was positively perceived by interviewees but again there was a question of transparency and again **I recommend that the secretariat should publish a brief statement of the selection criteria.**

38. The Moorland Forum only carries out a small number of financial transactions and its accounts are audited by Carson & Trotter of Dumfries. The Director was comfortable with the idea of SNH carrying out a governance audit, but I do not feel that this is necessary.

Funding model

39. The fundamental question is whether Moorland Forum will ever be able to be financially independent or if it will always need some public funding? Certainly for the next three to five years, I think it unlikely that the Forum will be able to operate without subsidy.

40. However, it is possible for the Forum to operate on a mixture of core funding for the full Forum meetings, with each subgroup operating as an independently financed project. As will be described in more detail later in this report (paras 43 - 47), customers such as Scottish Government, SNH or private or public bodies would commission Moorland Forum to set up a subgroup which would consider a topic of importance. The outputs of the subgroup would be defined in a service level agreement.

41. There is clearly some appetite for this type of service as evidenced by a recent proposal by Scottish & Southern Electricity to set up the Peat Working Group under the Moorland Forum.⁴

42. There appears to be little appetite for the Forum to operate fully in the manner of a commercial consultancy, charging commercial rates. However, it seems reasonable to me that the Forum should be able to recover its costs and those of its members. The Forum may wish to consider the possible benefits of setting up a Community Interest Company as a way of allowing members to be recompensed for their time, while providing a level of protection through limited liability. I would stress however that the Forum would need to take legal advice before embarking on such a course.

Future needs for engagement with key stakeholders

43. The Moorland Forum appears to be ideally suited to meeting the Scottish Government's needs to engage with stakeholders. The mix of members means that most upland land management interests are represented and the group is obviously capable of producing well thought-out, clearly articulated responses to questions.

44. If the Moorland Forum is to continue to exist, it must meet its members' aspirations of delivering concrete outputs and the needs of Government for relevant timely reports. These needs are largely complementary as informing Government policy development will produce the type of outputs most members wish to see.

⁴ This had come from the Peat Summit organised by Scottish & Southern Electricity as the secretariat for the 2020 Climate Group, in April 2011. However, since the report was originally drafted, it has become clear that SSE will not fund the work of the group.

45. There was a suggestion from Scottish Government that the Forum could be more proactive and should ask which topics were on the Government's 'radar'. The Forum could then work in partnership with Government to develop reports or other products that met Government's needs.
46. SNH may well wish to consult the Forum on wildlife management licensing and on taking the Land Use Strategy from a strategic document to a solution on the ground. As already mentioned (para 28), the Forestry Commission may also see the Forum as an ideal stakeholder group to work with on woodland expansion. In addition, there is some appetite for shared projects, jointly funded by more than one public body.
47. The existence of a ready-made stakeholder group like the Moorland Forum would also put it in a strong position to bid for work from any other bodies, public or private, that needs to consult on the uplands.

ANNEX 1 - ACKNOWLEDGEMENTS

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