Managing Waterway Restoration

FROM CREATING A VISION TO RESTORATION PLANNING

Where I come from

- A background in Archaeology & Heritage Management
- Nine years work on heritage led regeneration schemes ranging from a few thousand pounds to £310 million
- Success in raising funding from multiple sources
- Considerable experience creating waterside destinations which have worked and been nationally recognised as such and *most importantly*
- Working with communities to create viable places which have meaning and purpose

Today

Morning: Focus on the Vision and Defining the Project as a Whole

10:15 Welcome and Introduction to the Course – A stage by stage approach

10:30 Introduction to Project Management

11:30 Coffee / Tea Break

11:45 A: Strategic Definition - Setting out a Vision - Why does it matter? What it is you want to do and WHY?
Starting points – your stakeholders, your resources, your goals
Discussion of your starting points - Is your vision fit for purpose?

12.30 Working with Stakeholders and Partnership Working

1:00 Lunch and Networking Session

Afternoon: Focus on Restoration Planning

1:30 B: Scoping and Evaluating
What do you have to work with?
Working with Consultants – Discussion
C: Initial Design

2:45 Grab a coffee time

3:00 D: Planning for Project Delivery – Element Phasing or Eating the Elephant…
Thinking about funding – thinking about sustainability

4:00 Thank you and Close.

Welcome

- “No one in their right mind would attempt to restore a waterway”
- My wife would agree
- There is no “Correct Process” or single line leading to restoration.
- It is a complex network of interactions unique to each waterway.
- In an attempt to develop a coherent approach to helping groups navigate this web we have borrowed the “work stages” concept from the Royal Incorporation of British Architects (RIBA)
- As developed here it represents a very useful starting point for discussing some key issues and we will be using it today as a guiding framework

The Inland Waterways Association
Keeping our waterways alive!

Canal & River Trust

Plan of Work

	Defining the project as a whole			Transitional Stage	Applies to every identifiable sub-project or phase of delivery			
Work Stages	A	B	C	D	E	F	G	H
Tasks	(0) Strategic Definition Establishing a vision	(1) Scoping & Evaluation What you have to work with	(2) Initial Design What are you working towards	Planning for Project Delivery How you will get there	(3) Developed Design What you will build & how	(4) Detailed Technical Design & Major Funding	(5) Construction	(6&7) Hand over/ Use/After care
Headline project management tasks	Establish a VISION – a clear statement of what you want to do and justification of why it should be done. Include in this what the benefits are to the wider community	Scope out the wider benefits- community/economic/ environmental Establish income generation opportunities, ongoing maintenance liabilities & principles	Initial design concepts Waterway sustainability plan	Agree phasing for delivery Develop business plan for project or project element Establish long term maintenance requirements	Design developed to a point where planning applications can be sought. Undertake detailed QS estimates Finalise full business plan for project or project element	Build drawings, QS and Contract specifications	Commence phased construction work	Conclude administration of volunteer led project of building contract Maintenance and monitoring commence Economic and social impact assessment
Governance and appropriate procurement	Local restoration group established Raise support - build credibility for your vision and for your organisation	Formalise restoration group as a trust or society Informal ad hoc partnership with key stakeholders	Review governance structure for the group to ensure it is fit for purpose Partnership further developed and agreement on project lead	Formal Partnership sets up legal delivery body or legally agrees on delivery arrangements Contract development If Design & Build Stage C output issued for tender	Delivery body becomes responsible body for project and appoints Project Manager(s) if not already in post Traditional route tender procurement procedures commence	Preparation for project delivery: Preparation of briefs for letting of contracts for the project, individual elements or phase	Administration of volunteer led projects or building contracts Project management of individual elements or phases	Maintenance and monitoring commence Economic and social impact evaluation
Construction/ engineering	Map line/points of interest Explore current risks, threats & opportunities including long term financial opportunities and commitments	Engineering Feasibility – can it be done? Scoping study of how many miles of channel, how many locks, bridges, etc. along the proposed route, what condition Asset register completed	Outline engineering design with initial cost estimates Consider implications of CDM Develop initial risk register Steady state (cyclical maintenance) costs calculated	Draw up briefs for specialist design	Detailed design of key elements or structures to improve costings and to enable works if opportunity arises	Finalise design to building drawing (contract letting) stage Undertaking final detail QS estimates	Letting and administration of contracts for individual phases or elements Offsite manufacturing of portable elements (e.g. lock gates)	Snagging and practical completion
Land ownership	Establish land ownership Establish existing utility crossings and wayleaves which may impact on plans	Seek out landowners. Hold preliminary discussions identify opportunities and show stoppers (use traffic light system)	Initial land-take requirements- Clarify needs for land acquisition both for the line and for any access land, etc.	Agreement in principle to land transfer	Wayleaves, leases, licenses developed	Purchase of land or agreement of wayleaves, leases, licenses completed	Close liaison with landowners under lease or license	Temporary access or wayleaves restoration conditions discharged
Water management	Establish where the water supply might come from and likely water demands, plus main flood risk concerns	Initial flood risk assessment Initial estimates, scoping of boat traffic and other demands on water	Undertake water resources study and full flood risk assessment	Secure approvals, agreements, licenses for water abstraction Discuss and agree flood mitigation works	Outline technical design and specification of all water supply schemes, water control structures and any flood mitigation works. Functional design specification agreed for any monitoring and automation of water control & measurement	Detailed technical/engineering design of all water supply schemes, water control structures and any flood mitigation works	Phases to include consideration of flood risk to and from sites during construction (e.g. temporary abstractions, flood risk to works)	Production of water control manuals (operational guides) for routine and flood/drought control Establish and maintain procedures for compliance & reporting against any abstraction licences
Built heritage & natural environment	Compile a brief history of the built heritage of the waterway Compile a brief outline of the natural environment along the waterway	Scoping assessment of historic environment - archaeology, history and heritage(listed buildings etc.) Scoping assessment of natural environment (SSSI's, LNR etc.)	Maintain existing built heritage and natural environment Initial built heritage management plan and natural heritage management plans	Update management plans as circumstances dictate Detailed consideration of long term maintenance requirements	Environmental Impact Assessment & such studies are required for developing the Conservation Management Plan (CMP) Consultation with stakeholder on built, natural and heritage plans	Management plans finalised and formally adopted by partners	Protection and monitoring of the environment	Review management plans
Communication and involvement - getting others involved	Identify local and national groups who might have an interest	Identify audiences and potential users of the waterway Develop a communication plan with key messages	Getting the word out - develop and implement a plan for 'meanwhile' uses of interpretation, volunteering and maintenance and marketing plan	Ongoing maintenance of the line Meanwhile and communication uses continued Develop Activity Plan including audience development plan			Ensure continuous volunteer organisation Activity Plan implemented	
Fundraising	Broad understanding of possible funding sources	Ensure appropriate governance for fundraising Fundraising for feasibility studies	Seek small scale funding for start-up projects/ongoing maintenance, detail design etc	Develop broad fundraising strategy and apply for funding for major projects	Develop and submit major funding bids for delivery specific phases Commence match funding search	Secure match funding or individual project sponsorship Legacy implementation plan	Funding secured, spend monitored	Complete reports to funders
Planning consents	Ascertain if the route of the waterway is safeguarded within the local plan Understand ambitions of local plans	Informal discussion and inquiries regarding planning permissions Identify developments which may assist or impact on restoration	Initial design integration into locality (sense of place)/route protected within local plans Formal pre-application enquiries for key elements	Prepare outline planning application for project as whole Prepare planning application and, if applicable, listed building consent for first phase or project element		Submit planning application	Discharge of planning conditions	Completion and sign off as required
Documentation outputs	Vision statement Map of line - with key points of interest Register of landownership Outline of built and natural environment Line of the canal & linking canals	Project summary informed by a series of scoping studies including: Social & economic benefit, Natural environment management plan, archaeological & heritage management plans, Water resources study & initial flood risk assessment, Governance document, Communication plan	Waterway sustainability plan Partnership agreement Meanwhile use plans Initial built heritage & natural heritage plans	Restoration strategy for phased delivery Initial business plan for project or project element Fundraising plan & funding bids Briefs for specialist works Wayleave agreement to lease/ license	Final business plan for the project or project element Detail engineering drawings Conservation Management Plan Design Access Statement Funding bid	Technical drawings QS estimates Contracts specifications Planning application & supporting documentation	Build & site drawings and specification Project delivery programme with associated risk assessment, method statement, health & safety plan	As built drawings and surveys of all relevant structures/assets Water Control manuals

Here is one we prepared earlier…

To get here it went through Work Stages A to G.

Stage H is still pending…

To Summarise "the Process"

- Stages A, B, and C define the project as a whole – they are the foundation on which the project is built.
- In most cases these stages will be carried out once and while they should be reviewed in the light of changing circumstances they are likely to be subject to only limited revision (say four to five years, not every few months!).
- Stage D is the pivot from defining the project to delivering the project – it is built around a programme of intensive planning required to deliver the project as a whole. Successful completion of this stage will result in a deliverable project plan with clearly identified sub-projects and elements.
- Stages E, F and G are the delivery stages – involving detailed design work and construction. These stages will be repeated for each identifiable sub-project or stage in the project.
- Stage H is the operational phase – based around sustainable uses and income streams. Again this would repeat for each completed sub-project.

Today

- Today we will focus on stages A to D.
- Stages D to G will be the focus of the second part of this course
- Stage H will be the focus of the third part of this course.

But before we begin…

- There are more funding bodies and ways of raising funding than an application to the Heritage Lottery Fund.
- You need to consider the potential for raising funding from commercial operations and from "meanwhile" uses.
- In consequence when planning your project you need to retain flexibility in the design stage to accommodate delivery of projects, elements and tasks in different combinations to make best use of resources as they become available.

Introduction to Project Management

- The Basics of Project Management (speaking PM)
- Operation versus Projects
- The Triple Constraints (time, resources, scope)
- Management by Process Groups
- Clarity = Defining the Programme - Project – Stage - Element – Task
- Documentation
- If it is all so simple why does it ever go wrong?

“All we want to do is restore the b£**dy canal, not do more paperwork”

BUT…

"You know how it is…"

You Know how it is…

- You go onto the work site and everyone is standing around doing nothing and looking frustrated. You are accosted by volunteers angry because you have failed to order enough bricks to finish the job and the merchants cannot deliver before Monday.
- You look around the site and notice that the wall design has been changed – it now has additional support piers which are clearly eating up large numbers of bricks – you ask the site foreman "*oh, he says we changed the design because we thought it would be more stable that way*" he pauses "*we thought you would approve*".
- You agree the design looks more stable and applaud the initiative but wonder if they might have let you know sooner so you could order more brick. "*Well*" says the foreman "*We **are** letting you know, today. Now about those bricks…*"

How then to Manage Projects?

- First key step is to clarify how your organisation works
- Most organisations have grown organically – often with the same people wearing many different hats
- This is not a complaint just an observation that as organisations grow they get more complex and the governance arraignments often struggle to keep up
- An unclear structure makes the allocations of responsibilities and the management of risk difficult – it is a variant on old gag about *"Everybody thought Somebody was doing it, Somebody thought Everybody was doing it – in the end Nobody did it…"*
- To begin you need to separate out Operations from Projects

Operations versus Projects

- You need to separate out the operation of your organisation from the delivery of your programme and its projects.
- Remember it is your organisation that is promoting your programme or scheme.
- You must therefore separate the leadership function of the organisation from those of individual projects. In other words the project managers should report to the organisation board.
- Otherwise will lead to confusion, muddied lines of responsibility and a lack of oversight and control (something which HLF have picked up in the past).

Comparing Projects and Operations

Feature	Projects	Operations
Similarities	Planned, executed and controlled Performed by people Resource constrained	Planned, executed and controlled Performed by people Resource constrained
Purpose	Attain Objectives and terminate	Sustain the Organisation
Time	Temporary Definite beginning and end points	Ongoing
Outcome	Unique product, service or result Low volume	Non-unique product service or result High volume
People	Dynamic, temporary teams formed to meet project needs Generally not-aligned with organisational structure.	Function teams generally aligned with organisational structure
Authority of Manager	Varies by organisational structure Generally minimal, if any, direct line authority	Generally formal, direct line, authority.

What are Projects?

A Project is **"a temporary endeavour to produce a unique product or service"** (PMI)

It is Temporary – with a fixed beginning, middle and clear end point.

If your projects last forever then they have not been defined properly, are badly designed or they are simply too large for delivery – Scale your projects appropriately and break each down into smaller units to give yourself some realistic and achievable goals. When you reach them - Celebrate!

It is an Endeavour – it will require the services of many people to bring to fruition and their work must be co-ordinated.

Like most endeavours the outcome is not certain and obstacles will have to be overcome and risks manged.

It has a Clear Goal (product or service). This must be very clearly defined

For example you might have a project to build a new trip boat – the product is the trip boat – its day to day work is an "operation" and repeats. Building the boat requires project management – running it requires operational management.

Project Management is therefore concerned with…

…Defining a project, developing a plan, executing the plan, monitoring progress against the plan, overcoming obstacles, managing risks and taking corrective actions.

The Project Management Institute defines project management as

"the application of knowledge, skills, tools and techniques to project activities to meet project requirements"

or as Horine (2013) puts it

"the process of leading a team that has never worked together before to accomplish something that has never been done before in a given amount of time with a limited amount of money".

Managing projects

Any project will require planning, organising, implementing, leading and controlling in order to meet the goals and objectives.

It is therefore obvious that project management is largely about the process of managing competing demands and the trade-offs between the desired results of the project (scope Performance quality) and the natural constraints of the project (time and resources/cost).

In setting out to design a project we are faced with the "triple constraints" of project management:

- Time
- Resources (often expressed as Cost)
- Scope

This are in turn modified with addition of an internal "expectation triangle" (we all want a Rolls Royce for the price of a Mini)

Understanding Process

Project Management is therefore a process – a sequence of activities towards a desired end point.

Within the overall arc of all projects there are a number of common sub-stages

These reflect the clusters of activities which need to be undertaken at each stage in the process of bringing a project to life, planning, delivering and completing. These are usually called Process Groups. The five key PG's are:

- **Initiating** Beginning (Form, Storm and Norm)
- **Planning** Design and Planning
- **Executing** Delivery
- **Controlling** Monitoring (during the entre project and especially delivery)
- **Closing** Completion and Handover

Description of Project Management Process Groups

	Process Group	Description	Common terms
1	Initiating	Authorising the project or phase	Preliminary planning “kicking off”
2	Planning	Defining and refining objectives of the project and selecting the best course of action to attain those objectives	Defining Developing the plan Setting the stage
3	Executing	Co-ordinating the people and resources to implement the plan	Making it happen, Getting it done coordinating
4	Controlling	Ensuring project objectives are met by monitoring and measuring progress regularly to identify variances from the plan so that corrective actions can be taken.	Tracking progress Keeping on course
5	Closing	Formalising acceptance of project or phase and bringing to an orderly end.	Client acceptance Transition Closeout.

Understanding Sequence

There are a lot of descriptions used in Project Management – each system has different descriptive terminologies for different stages or activities. This forms a hierarchy of size and complexity – for example:

Programme: The entire scheme made up of several projects.

A length of Canal (composed of several bridges, locks and channel)

Project: A major unit which is a logical and feasibly deliverable subdivision of the programme

A bridge (one of several bridges – each a project – on this length of canal)

Stage: A key unit which is integral to the project

Bridge Foundations

Element: The actions which will have to be carried out to deliver a Stage

Excavate and Shutter Foundation Trench

Task: The individual activity to be carried out by a person or working group/party

Erect shuttering

Note that less complex projects can use a simpler Project/Element division - Your project should pick one descriptive system which suits the size of your work and stick with it (use a glossary to "fix" a particular meaning).

Summary of Programmes, Projects, Stages, Elements and Tasks

Scale & Level	*Beginning*		*Timescale*					*End*
Programme	**Programme** or Scheme							
Project	**Project One**			**Project Two**		**Project Three**	**Project Four**	**Project Five**
Stage	**Stage**	**Stage**	**Stage**	**Stage**	**Stage**	**Stage**	**Stage**	**Stage**	**Stage**
Elements	**Elements**							
Tasks	**Tasks**							

Documenting the Project

Below we list a range of project documents which might be produced to support a project – some of these are only required on major projects. The critical documents are:

The Project Charter: This is a clear statement from the management (in our case this is usually the Board of Trustees or Board of Directors) which sets out in the clearest way the goal of the project It is the permission to proceed.

The Project Definition (or Project Definition Document): This sets out exactly what the project needs to accomplish and the criteria for success. The PDD often summarises the rationale for the project. In some cases it will need to identify (and close off) potential side-lines or irrelevancies.

The Project Plan: This sets out how the project will be delivered – the resources required and how they will be used, the order in which they will be used. It is a very closely specified document. It will set out the project timetable against which progress can be measured.

Documents for Managing a Project

Project Charter

Project Definition Document
Requirements
Project Schedule
Status Reports
Milestone Chart
Project Organisation Chart
Responsibility Matrix
Communication Plan
Project Glossary
Quality Management Plan
Staffing Management Plan

Risk Response Plan
Project Plan
Deliverable Summary
Project Log
Change Request Form
Project Repository / Archive
Project Notebook

If it is all so obvious why does any project ever go wrong? (1)

- Not properly managing stakeholder expectation through the project.
- Not gaining agreement and buy-in on project goals and success criteria from key stakeholders.
- Not developing a realistic schedule that includes all work efforts, task dependencies, bottom-up estimates and assigned resources.
- Not getting buy-in and acceptance on the project schedule.
- Not clearly deciding and communicating who is responsible for what.
- Not utilising change control procedures to manage the scope of the project.

If it is all so obvious why does any project ever go wrong? (2)

- Not communicating consistently and effectively with all key stakeholders (here over communication – the dreaded "reply all" button can be as damaging as not sending any email at all – agree who needs to know what & stick to it).
- Not executing the project plan (going off piste…).
- Not tackling key risks early in the project (don't ignore a risk and hope it will go away – think probability of risk – the common ones are the ones to tackle first).
- Not proactively identifying risks and developing contingency plans (responses) for those risks.

If it is all so obvious why does any project ever go wrong? (3)

- Not obtaining the right resource with the right skills at the right time
- Not aggressively pursuing issue resolution (letting sleeping dogs lie WILL come back to bite you)
- Inadequately defining and managed requirements (like using two contractors - one who worked in metric units, the other in imperial – yes, NASA did do that and slammed into Mars at a rate of knots)
- Insufficiently managing and leading project time - failure to make timely interventions in management

Hollingwood Hub, Staveley

Waterways as Multifunction Heritage Infrastructure (yes I really said that)

- A approach which helps to
  - Understand the different types of stake
  - Evaluate the needs of different groups of stakeholders
  - Engage Communities in decision making around their heritage

Heritage as Infrastructure

Heritage is part of the infrastructure of a region, locality, place and people.

Infrastructure is a framework that supports activity

Heritage is the framework of our everyday lives and of the experience we seek when we visit a new place.

It is the framework within which income is generated.

How then to understand that “framework” for waterways

Inland Waterways interventions and investments

Economic growth and investment	Waterways support the visitor economy and act as a focus for urban regeneration and rural diversification
Land and property values	Development uplift value of approximately 19% for properties with waterfrontage and approximately 8% for non-water frontage within the same development
Tourism	Waterways are visitor attractions as well as connecting other tourist destinations, generating a significant number of overseas visitors and overseas visits foregone
Labour productivity	Waterways infrastructure supports SMEs and jobs in craft manufacturing, tourism and service sectors
Products from the land	Capital growth project – identifying suitable pockets of land along waterways to help boost the amount of locally grown food
Health and well-being	Waterways and towing paths form part of the “natural health service”, acting as “blue gyms”, encouraging and supporting physical and healthy outdoor activity
Recreation and leisure	Waterways and towing paths accommodate a wide range of recognised watersports e.g. canoeing, sailing, etc., and informal recreational activities, e.g. dog walking, jogging, angling, etc.
Quality of place	Waterways are being utilised as vehicles in place-making and place-shaping
Land and biodiversity	Waterway corridors are important wildlife routes and act as stepping stones for mitigation against habitat loss, dispersal and genetic exchange of plants
Flood alleviation and management	Flood risks associated with canals are different from rivers. Waterways are an essential part of the land drainage system .
Climate change adaptation and mitigation	Inland waterways are a renewable energy sources – hydro and wind power; use of canal water for heating and cooling buildings. Contribution to urban cooling.

Provides a simple tool for analysis

- Enables a holistic view of heritage assets
- Identifies the values which generate most economic value
- Identifies those areas which are not economic but which require protection to safeguard the heritage/sense of place
- Enable allocation of resources to "pinch" points which may have nothing (or everything) to do with the asset itself
- Is automatically engaging with the community and politics

Key Stages in Waterway Restoration

- What follows looks at the key stages in waterway restoration.
- Today we will focus on the initial stages from creating a vision to restoration planning.

First Steps: Unique (ish), One Off (ish)

A. Define the Project
B. Scoping and Evaluation
C. Initial Design
D. Planning for Project Delivery

A: Strategic Definition – Creating a Vision

- Strategic Definition – What is it?
- Setting out a Vision - Why does it matter? What it is you want to do and WHY?
- Starting points – your stakeholders, your resources, your goals
- Discussion of your starting points
- Is your vision fit for purpose?

Stage A: Strategic Definition

- The first stage in any project is working out what it is you want to do and WHY?
- Purpose
- Goals and Objectives
- Scope, Project Context, Project Dependencies
- Expected benefits, business case value,
- What are we going to do - scope
- Who is affected and must be involved – stakeholders
- How will be know when we get there (success criteria)

Shaping a Vision

The Vison is the shop window for your project – Like a shopfront it does not show everything in the store but it does need to excite people and make them welcome.

Don't use the phrase "to restore the xx canal" - while this might be exciting to us enthusiasts it is of limited interest to the wider public. Why not use a more inclusive phrase like

"A living waterway enjoyed by walkers, cyclist, anglers and boaters"

"Enabling economic and social regeneration by creating a living canal corridor connecting communities and visitors with a distinctive industrial, cultural and natural heritage which can be accessed and enjoyed by all".

When formulating a vison do remember your audience – public, stakeholders, decision makers, politicians or all the above?

Building Credibility

- Your VISION is a clear statement of what you want to do and why (what is it all about?).
- You then need Establish a reason for why your vision is of value (why should we bother?)
- Build credibility for your vision and for your organisation (how will it be delivered?).

For Example – Community Gains

- Positive image
- Place shaping
- Health and well being
- Engagement (volunteering)
- Community Ownership and “ownership”
- Education and Training – New individual skills
- Community Capacity

Working with Stakeholders

- Stakeholders? What Stakeholders?
- Different types of stake
- Evaluating Need(s)
- Engaging Communities and Asking People

Who matters?

Stakeholders - They All Matter

- Most communities have been told many, many, times what will happen to them – This reflects a very top down way of working. Some may feel they have been made promises which have not been kept.
- The most effective waterway groups engage directly with their communities and address issues which are of importance to that community not just the boating fraternity.
- Importance of direct engagement in the local political process (small "p" not party) and necessity of consultation from the bottom-up
- Do not overpromise – you need realistic projects which communities can rally behind and which have a realistic prospect of completion in a human timeframe.
- Focus on deliverable projects from the long term programme – rather than long term goals which may lie many year ahead. People love progress - and your support will grow.

Potential Stakeholders

There are many potential stakeholders – think laterally and avoid only going to the "usual suspects". Here are some suggestions from the participants of session one:

Usual Suspects

- Local Authorities (Councils)
- Canal & River Trust
- Inland Waterway Association (National & Local)
- Anglers Associations
- Local Enterprise Partnership
- Water Based Businesses (boat hire, marinas, etc.)
- Sustrans
- Historic England
- Tourism Bodies – Local Destination Management Organisations (DMOs), Tourist Information Offices
- Environment Agency
- Natural England
- Local Wildlife Trust (or Trusts)
- Youth Groups (Scouts, DoE)
- Groundwork

Worth Thinking About

- Parish Councils & Neighbourhood Groups
- Landowners, Neighbours, Residents
- Non-Waterway Based Local Businesses
- Big Corporate / National Businesses
- Utility Companies – Especially Water Supply?
- Local Chamber of Commerce
- Major Local Hotels / Hotel Owners Group
- Big local non-waterway Tourism Destinations or heritage sites (e.g. a Castle or a preserved railway)
- Youth Hostels Association
- Ramblers Association
- British Canoe Union
- Sport England
- Local NHS Area
- Local University, HE or FE Colleges

B: Scoping & Evaluation

- Scoping and evaluation
- Setting out a baseline
- Do you have the key baseline data?
- Working with Consultants

Scoping & Evaluation

- What do you have to work with?
- What is the condition of the canal or river?
- What is the state of the built heritage?
- What is the state of the natural heritage (environment)?
- What communities does the canal run though? What condition are they in?
- How does the project break down into realisable units?
- How will you make your project sustainable?

Thinking outside the waterway box

Any scoping study should consider a corridor much wider than simply the canal alone

If you can show how your corridor links up to other destinations you can argue that restoration and development will resulting a longer visitor dwell time and hence a greater visitor spend.

But you need to be aware of the opportunities and present the result in a systemic way.

Canal Corridor studies are not new and were a key tool in the development of the Huddersfield Narrow and Rochdale visions.

Always come back to your Vision…

Working with Consultants

- Deciding on the Scope of Work
- Writing a brief
- Managing Contracts
- Note that the legal aspects of managing consultants are well described in the IWA Technical Restoration Handbook.

Consultants: Care and Feeding

If you are going to employ consultants you first need to do some serious preparation:

- Ensure you really need a consultant (do a skills audit of your society / trust membership).
- Treat the consultancy work as a project in its own right not as a sub-element of something else – i.e. you need to focus as well as the consultant.
- Write a clear and concise brief (I append an example of only four pages – you do not need a 30 page brief – micro management in the brief is counter productive). IF the brief gets too complicated consider splitting the work into a number of studies.
- Be reasonable in your specification – if you are offering a small sum of money and expecting the consultant to cover a wide range of topics the result will inevitable be shallow and superficial. Focus on what you really need to know in order to move forward.
- Be timely in seeking consultants – think about when in the overall process you need the information – for example a detailed n ecological study might be best undertaken immediately before a planning application – old out of date studies have been the downfall of several projects. Think about lead times for report production.
- You need to specify what you already know (consultants are not psychic – they work from first principles so will tell you what you already know if you don't tell them that you already know!)
- Unless you are using government funding you do not need a complex procurement process – advertise cheaply on websites like http://www2.le.ac.uk/departments/museumstudies/JobsDesk keep it simple. Have reasonable lead times – short lead times do on encourage busy consultants to apply – they put them off!

C: Initial Design

- Initial Designs
- Sufficient detail to enable planning discussions
- Initial estimates of funding requirements
- Tackles key issue like gauge and water supply
- Initial estimates of long term maintenance requirements.

Stage C: Initial Design (1)

- What are you working towards?
- Initial design concepts
- Initial land-take requirements
- Initial design integration into locality (sense of place)
- Initial Business Sustainability Plan.
- Audience Development Plan
- Initial Built Heritage Management Plan.
- Initial Natural Heritage Management Plan.

Stage C: Initial Design (2)

- Initial Water Management Plan
- Formalise Partnership
- Outline Engineering Design (sufficient detail for costing and funding applications)
- Clarify needs for land acquisition both for the track and for any access land, etc.
- Water Supply (including modelling for climate change)
- Full Environmental Impact Assessment (EIA)
- Agreed responsibilities between partners
- Project Lead/ officer for delivery agreed/ appointed
- Formal pre-application enquiries

Grain, Diversity and Mosaics

The importance of understanding the heritage infrastructure that creates a unique place to live in, work in and visit.

You can't enhance what you do not understand – which brings us back to the quality and reliability of your baseline data on the built and natural environment.

Initial Design

D: Planning for Project Delivery

- Stage D is the pivot from defining the project to delivering the project
- Stage D is built around a programme of intensive planning required to deliver the project as a whole.
- Successful completion of this stage will result in a deliverable project plan with clearly identified sub-projects and elements.

Stage D: Planning for Project Delivery

- Phasing for Delivery
- Business Case
- Briefs for specialist design
- Long term maintenance requirements
- Update Management plans as circumstances dictate
- Formal Partnership sets up legal delivery body or legally agrees on delivery arrangements
- Series of technical studies
- Marketing plan /Summary Plan

Managing the delivery of restoration is the subject of the next part of this series.

Hopefully we will see you at part two in January.

Many thanks for attending today.