



## **Notes on completion**

### **Notes on Completion**

**Your application will have a better chance of success if you read the programme introduction and help notes before filling in this form.**

**This application form has nine sections following your project summary below:**

**Section One - Your Organisation**

**Section Two - The Heritage**

**Section Three - Your Project**

**Section Four - Project Outcomes**

**Section Five - Project Management**

**Section Six - After the Project Ends**

**Section Seven - Project Costs**

**Section Eight - Additional Information and Declaration**

**Section Nine - Supporting Documents**

**We will confirm we have received your application when we have your online form and all supporting material. If you are sending any material in hard copy, this must arrive within five days, and by the relevant programme deadline, if applicable. We will not assess your application if you miss the published programme deadline, have not provided the correct supporting documents (please do not send more than we ask for) or have not answered all the questions.**

## Summary

**Name of your organisation**

Canal & River Trust

**Project title**

Restoring the Montgomery Canal as a resource for people and wildlife

**Reference number**

HG-12-08998

**Project summary**

**In no more than 150 words, summarise your project. We will use this text to tell people about your project, including our decision takers.**

The continued restoration of the Montgomery Canal is a significant cross-border project and a priority for Canal & River Trust. The next step in delivering the Conservation Management Strategy, its mission statement is:

“To restore the Montgomery Canal as a flagship model of sustainable canal restoration with a strategic focus on rural regeneration. To protect the canal’s unique environment and heritage through research, management and excellence in design. To increase access for all through interpretation with the promotion of tourism and educational use.”

Our project will:

- Expand an already strong base of participants in the restoration of built and natural heritage in the canal corridor
- Positively manage possibly the world’s best location for floating water plantain, to help secure its future
- Improve the canal setting as a resource for community events, learning and better health
- Enable a further 2km of canal to be navigable by narrowboats

**Have you received any advice from us before making your application?**

Yes

**Please tell us who you received advice from.**

Laura Birkett and Reyahn King

**Is this your first application to the Heritage Lottery Fund?**

No

**Please tell us the reference number and project title of your most recent application.**

HG-12-01650 Revealing Oldknow's Legacy (Round 2)

## Section One - Your Organisation

### 1a Address of your organisation:

**Address line 1** First Floor North  
**Address line 2** Station House  
**Address line 3** 500 Elder Gate  
**Town / city** MILTON KEYNES  
**County**  
**Postcode** MK9 1BB

### 1b Is the address of your project the same as the address in 1a?

No

### Enter the address of your project:

**Address line 1** Canal House  
**Address line 2** Morton  
**Address line 3**  
**Town / city** OSWESTRY  
**County** Shropshire  
**Postcode** SY10 8BQ

### Local Authority within which the project will take place

Shropshire

### Constituency within which the project will take place

North Shropshire

### 1c Details of main contact person

#### Name

Alex Ball

#### Position

Development Manager

### Is the address of the main contact person the same as the address in 1a?

No

### Enter the address of the main contact person:

**Address line 1** Canal & River Trust  
**Address line 2** Birch Road  
**Address line 3**  
**Town / city** ELLESMERE  
**County** Shropshire  
**Postcode** SY12 9AA

**Daytime phone number, including area code**

07717 806356

**Alternative phone number**

01606 723800

**Email address**

alex.ball@canalrivertrust.org.uk

**1d Describe your organisation's main purpose and regular activities**

The Canal & River Trust (CRT) is one of the UK's newest and largest charities created in July 2012 as successor to British Waterways, guardian of a 2000 mile network of historic inland canals and rivers across England and Wales.

Our mission is: to inspire people to connect with our canals and rivers.

Our purpose is: to act as guardian for the canals and rivers of England and Wales - ensuring that history, nature and communities are central to everything we do.

CRT is a company limited by guarantee and a registered charity; its objects are set out in clause 2 of its Articles of Association dated 27.03.12. (submitted with this bid)

As a Charitable Trust our regular activities are funded via a combination of a 15 year contract with DEFRA (£49,000,000 per annum) and self-generated income (see Annual Report and Accounts 2011/12).

As well as managing a 2000 mile network of canals and rivers, we actively:

- promote and manage the heritage and environmental assets we protect
- work in partnership to further conserve, enhance and promote our network for community benefit and public awareness.

**1e The legal status of your organisation**

**Please select one of the following:**

Organisation not in the public sector

**Please select one of the following:**

Other

**Please specify**

Charity

**Describe the size and staff structure of your organisation**

CRT has approximately 1500 employed staff across England and Wales along with thousands of active volunteers. As a charity we have a Board of Trustees, a Chairman and Chief Executive. The structure is broadly in two parts; central specialist teams (eg Heritage, Environment, Museums and attractions and Fundraising); and local waterway teams who are responsible for the day to day operational management of the network. Each waterway unit has a Partnership Board and Chairman who work closely with the team to support and help deliver the functions of running their local canal and rivers network. There is also a Waterway Partnership for Museums and Attractions and one for All Wales.

The Montgomery Canal is in the North Wales and Borders Waterway and corresponding Waterway Partnership area, and falls within the All Wales area.

**If applicable, how many board members does your organisation have?**

10

**How much did your organisation spend last financial year?**

180500000

**What level of unrestricted funds is there in your organisation's reserves?**

information not available at present due to financial systems not yet being switched over to charity requirements

**If your organisation is any of the following, please provide the details shown:**

**Company - give registration number**

N/A

**Registered Charity in England, Scotland or Wales - give registration number**

1146792

**Charity recognised by HM Revenue and Customs in Northern Ireland - give reference number**

N/A

**1f Will your project be delivered by a partnership?**

No

**1g Are you VAT registered?**

Yes

**Please provide your VAT number**

125511937

## Section Two - The Heritage

**In this section tell us about the heritage your project focuses on and why it is valued.**

### 2a What is the heritage your project focuses upon?

The heritage we are focusing on is the Montgomery Canal, a 56km long rural canal, only partly navigable; of high quality natural and built heritage, located in Wales and England.

The Montgomery Canal has an Act of Parliament protecting its route for the purpose of restoration. It is important for its aquatic plants, and as such it is a SSSI in England and Wales, and a SAC in Wales. The SAC status is a particularly high designation and of European significance. The canal is also important for its built heritage. With 128 listed buildings it has great archaeological and historical significance, set also within the context of very attractive countryside.

The canal stretches from Lower Frankton, near Ellesmere in Shropshire and, at its heyday, terminated at Newtown in Powys. At Frankton Locks the canal joins the majority of the 3200kms of canal network in Britain, at the Llangollen Canal. The Llangollen Canal (part of it a World Heritage Site) is very popular with boaters and visitors on foot. The Montgomery Canal, today, is in part fully-watered, in some locations holding water but not passable by powered boats, and along a 5km section completely dry. The lengths, from the junction with the Llangollen Canal, are as follows (north to south):

Navigable from Lower Frankton to Gronwen Bridge (13kms) – includes a 800m stretch restored with HLF funding by BW between 2005 and 2008

Dry to Llanymynech (5km)

Navigable at Llanymynech (.5km)

In water, but only accessible to portable craft to Ardleen (6km)

Navigable to Refail (17km) – includes an 11km stretch restored by CRT and SUCS with funding from the Prince of Wales Committee, opened in 1980

In water to Freestone Lock (10km)

Dry/cycle path to Newtown (5km)

Currently the Welshpool length (Ardleen to Refail) is unsustainable because it is too short to be self-sufficient and needs more diverse activity (especially economic) to help justify maintenance costs.

Why is the Montgomery Canal important for its social history?:

The Montgomery Canal is a distinct landscape feature and represents a period of time in the early 19th century, related to the industrial revolution, but driven by the desire to supply the area's agricultural land with lime. The canal made a big impact on this rural area, it brought with it employment, new skills and in some cases a new way of life. It was paid for by local land-owners who recognised it was not going to be a commercial waterway. A canal presented a quick way of moving much needed local limestone (for turning to lime) to farmland and a means of moving produce to customers in nearby towns.

The canal construction was a big undertaking despite the canal following the Severn Valley for much of the route, ground conditions were not ideal and the small number of river-crossing aqueducts failed shortly after completion. This greatly occupied canal engineers, specialist contractors and the general labouring navvies. As the canal become usable, rural activities intensified, not only directly on farms, but through the burning of lime for the field, transshipment of materials, increased accessibility of water for generating power, and industry built up around wool and other local resources. This offered employment on boats, in factories, mills, workshops, maltings, inns, at wharves, kilns, locks, boat-builders, and so on. As fortunes changed, narrowboats became a home as well as a place of work as families moved on-board to save money. In the mid-1800s, railways and the management of canals by rail companies lead to the demise of the canals. The Montgomery Canal finally ended its trade days as a result of the breach near Frankton in 1936, the canal being officially abandoned in 1944.

Why is the Montgomery Canal important for its built heritage?:

Montgomery Canal is a unique example of a rural canal constructed to transport lime for agricultural improvement. Built between 1797- 1819, with a later phase completed in 1832, it is a transport infrastructure, largely intact, which clearly expresses its function as an engineered waterway, with associated water controls, operational and domestic buildings for those who used it and a wealth of buildings associated by trade and industry. Towns and villages form an important part of the route, but are few in number, each having a distinctive role and benefit from the canal, for example Pool Quay was a hub of timber shipment for

Montgomeryshire Oak, and Newtown at one point had 81 flannel mills. Llanymynech and its abundance of carboniferous limestone was a key driver for the construction of the canal, and as a result Llanymynech became a hub of activity including a tramway, limekilns, docks, stables and other supporting buildings. The whole canal had 98 limekilns at the height of lime activity.

The Montgomery Canal was a pioneering waterway in relation to the use of cast iron lock gates, aqueducts and bridges (with iron “fish-bellied” bridge decks), making it of international significance. George Buck, the Engineer, designed many of these structures, plus also unique paddle gear for the operation of locks, which can still be seen on the canal today. It also has a very early example of a salmon fish pass constructed in conjunction with the weir and canal feeder at Penarth. The most significant structure is the Grade II\* Vyrnwy Aqueduct.

With a linear feature such as a canal, the boundary is important as a visual marker of the canal's presence from the landscape around. It also tells the story of the relationship between waterway and associated land uses and businesses. The canal boundary is often the interface between mills, wharves, lime kilns and the many other land uses and is a valuable, yet easily eroded line; key to understanding the canal's past. Hedges are a key feature of the boundary; stone and brick walls take over in settlements and enclose canal-side business and industry.

Why is the Montgomery Canal important for its historic landscape?:

The canal infrastructure sits alongside the River Severn along much of its route in Wales and the wider landscape is enclosed by the Breidden and Llanymynech Hills. The area is steeped in history and has evidence of many periods including Early Bronze Age in the Severn and Vynwry Valley floors. Churches, settlements and estates are a rich decoration on the tapestry of pastoral, grazing and arable farmland. Quarries (some still active), underused historic transport infrastructure and associated facilities add to the romance of the surroundings, but remain under threat through neglect and inappropriate development – in many cases wildlife takes hold as human activity fades.

Why is the Montgomery Canal important for its natural heritage?:

The canal is a Special Area of Conservation (SAC) in Wales due to it harbouring the largest UK populations of floating water plantain and almost certainly the largest in the world. Floating water plantain (*Luronium natans*) has found a new habitat in man-made waterways and has European protection due to its disappearance from natural habitats. Of the 38 km of canal in Wales, *L. natans* occurs in 29kms. Canal habitats have become a stronghold for the species. Canals seem to provide a preferred habitat for *L. natans*; the reason for this is not completely understood. It is thought that the low nutrient waters from upland sources along with substrates of the artificial canal provide a combination of conditions that allow aquatic species of plant that are often poor competitors to flourish. Grasswack pondweed (*Potamogeton compressus*) is another nationally important species within the assemblage of aquatic plants and the Montgomery Canal is the best site in the UK for this species. At their optimum these habitats are unique in species diversity and richness. However, being artificial, they require constant management to ensure that ecological succession does not allow more aggressive species of plant to dominate.

The Canal is a Site of Special Scientific Interest (SSSI) along much of its length, for a range of species; mammals (bats, otters, water voles and shrews), reptiles and amphibians (grass snake, viviparous lizard, great crested newt, smooth newt, slow-worm, palmate newt and toad), aquatic invertebrates (dragonflies, many damselflies, caddis fly, beetles) and molluscs and freshwater sponges, plus many plants.

The natural environment of the canal encompasses the verges and the hedgerows, as well as the channel, offering a wonderful resource in the form of a continuous network of habitat for species to connect, feed, breed and access a range of different habitats, feeding grounds and cover. Over a number of years reserves have supplemented the canal environment, particularly for aquatic plant habitat.

Existing area of nature reserves in England and Wales:

Wales; total open water area; 2.034 hectares, in a total of 5.217 hectares of reserve (across 4 sites)

England; total open water area; 0.7 hectares in a total of 1.35 hectares of reserve (across one linear site)

Total required nature reserves in England and Wales:

Wales (figure for Llanymynech to Welshpool): total open water area; 6.8 hectares in a total of 8.16 hectares (across 5 sites) – not included in this project

England; 3.75 hectares of open water in 4.5 hectares of reserve

Who is the Montgomery Canal important to?:

The canal was officially abandoned in 1944, eight years after a fairly small scale breach, which was not considered worthy of spending £400 to repair. The canal never really left the hearts of locals and heritage enthusiasts, but it was the threat of a bypass, around Welshpool, in 1969 which galvanised action. On the 18th and 19th October 1969, 180 volunteers from all over the country, along with JCBs, pumps and lorries, cleared much of a ¾ mile section of canal. "Operation mudsplash" (later renamed the Big Dig) was a big success and set the restoration plans off and running.

Volunteer involvement, through clearing the canal channel, rebuilding structures, campaigning and raising awareness has gone on throughout the last 44 years. Key milestones in the restoration of the canal in the last 25 years;

1987 – British Waterways Act protecting the line of the canal

1990s – Gallowstree Bridge and Whitehouse Bridge raised opening navigation over a 17km stretch around Welshpool. Aston Locks Nature reserve opened in 1994, Frankton Locks to Queen's Head opened in 1996.

1998 – Major HLF funding application for restoration fails, but Montgomery Canal Partnership (MCP) forms

2002-2005 – Conservation Management Strategy produced and signed up to by MCP

2007-08 – Sizeable projects deliver various improvements, including development of Llanymynech Heritage Area, Powys Tourism project and extension of navigable canal from Gronwen to Redwith Bridge

There is huge support, at ground level, and through public bodies and trusts, to restore the canal. The formal partnership has a broad membership:

Canal & River Trust (British Waterways before July 2012)

Montgomery Waterway Restoration Trust (MWRT)

Powys County Council

Shropshire Council

Natural Resources Wales (formerly Countryside Council for Wales, EA Wales)

Natural England

English Heritage

Cadw

Royal Commission on the Ancient and Historic Monuments of Wales (RCAHMW)

Environment Agency

Shropshire Union Canal Society (SUCS)

Inland Waterways Association (IWA)

Montgomeryshire Wildlife Trust

Shropshire Wildlife Trust

(recently added Severn Rivers Trust)

These bodies signed up to a Conservation Management Strategy (CMS) in 2005. It was not an easy task to write because of the breadth of interest and the passionate beliefs of the groups, but a consensus was reached. It is important the delivery of this HLF funded strategy is seen through, in respect of the status of the canal and the effort in agreeing how to make it a sustainable flagship of restoration.

The CMS is a framework for taking forward the restoration of the canal, whilst balancing it with the requirements specific to the habitat designations (in relation to floating water plantain). The partnership has agreed to the need for new nature reserves which will offer a more secure and better suited environment for the aquatic plants and the wider diversity of wildlife. The canal channel is inherently a fragile environment for anything other than invasive species and needs careful management to maintain biodiversity.

The CMS states: "Community consultation studies have shown that the contribution the canal and its associated buildings make to the existing landscape is greatly valued, both by local people and visitors to the area. Consultation also shows that there is substantial support for sensitive restoration of the canal to navigation and improved access for informal leisure activities."

Welsh Government puts sustainable development and the ecosystem approach high in its agenda, the Living Wales framework aims at "focusing on the value of the environment as a whole, delivering environmental, social and economic outcomes nationally, regionally and locally", also "delivering environmental change, and restoration where appropriate". The recent move to a single body (Natural Resources Wales) for the regulation and management of the environment in Wales shows a belief in looking at environment holistically and within the context of social and economic considerations.



At a Campaign for the Protection of Rural Wales Symposium in July 2011, Glenn Millar, Canal & River Trust Economic Development Manager said “The navigable and potentially navigable inland waterways of Wales are a resource which has much to offer in helping to achieve the Living Wales approach. Though man-made the canal system delivers a wide range of ecological services – provisioning, regulating and cultural. Canal landscapes bring together the natural and built environment, support both ecological connectivity and our links with the past. At the same time they offer a vital component of the economy of the areas through which they pass, with recreation and tourism, both on water and land, replacing their previous transport function.” Powys County Council’s draft Local Development Plan Environment Paper states “The canal has great archaeological and historic significance; however, it also has economic potential as a tourist destination. It is located in extremely attractive countryside, and acts as a recreational route for the local population and tourists alike.”

Shropshire Council and its partners are committed to protecting and enhancing the county’s rich and varied heritage and supporting communities that are strong, healthy, safe and inclusive, and encourage cultural diversity, voluntary effort and participation in community life (Shropshire’s Community Strategy 2010-2020). Shropshire Council take particular interest in Heritage Canal and Railway Regeneration in their county, a report for an Economic and Environment Scrutiny Committee, in March 2009, prioritised two major projects, the Montgomery Canal being one (and the Cambrian Railway, the other), it gave support in principle “on the basis that a relatively short length remains to be reopened, that it links to the national network, that a viable organisation exists (Canal & River Trust) to implement it and the costs and benefits are well researched”. It describes the importance to the area as “Today Shropshire’s canals and railways remain as a rich inheritance both for their biodiversity and as tangible evidence of the Industrial Revolution in which Shropshire played such a crucial role”.

During the writing of the recent North Shropshire and Oswestry Visitor Economy Strategy (August 2012), a number of lead product types were identified and critically appraised with partners and local businesses. The dominant themes were:

Landscapes, Canals and Meres, Market towns, Gardens and Gardening, Heritage, and Walking.

All these themes apply to the Montgomery Canal, especially in light of the “collaborate to compete” strapline for the document, which reinforces the need to work across Authority boundaries (because visitors do not distinguish areas in this way when visiting an area). Oswestry and Welshpool towns are very close to the canal and the world renowned gardens of Powis Castle are a very short walk from the canal. Shropshire may lack some of the “must-visit” canal sites of some of nearby counties, but the overall richness of countryside and views from canal make it extremely attractive and it is the backdrop that the canal offers to walking, photography, pubs, tearooms, canoeing, events, wildlife watching etc that makes the canal so important to the local area and economy. The strategy goes on to look at the four areas of improvement for success; Perception (many England residents – 50% in VisitEngland’s poll – had no opinion about North Shropshire and feel it is indistinct); Performance (91% of visitors are day visitors, but overnighters at only 9% generate £42m spend of a total spend of £115m by both visitor types); Product emphasises the need to make more of the things on offer and to be careful of something for everyone approach which rarely interests anyone. Clustering experiences, joint marketing and suggesting itineraries are key to this; finally Partnership reinforces the notion of working across boundaries, making it clear what goes on and how businesses and attractions can be supported and how their experiences can feedback to tourism bodies.

The Visitor Economy is a key sector for investment within the Marches LEP Strategy for Growth (2013-2022) and key sector identified by the Shropshire Business Board. Shropshire’s Economic Growth Strategy (December 2012) highlights the need to enhance Shropshire’s visitor offer and helping Shropshire to be widely perceived as one of the best visitor destinations, as well as an excellent place to do business. As well as the clear focus on what can inspire people to visit the county, there is also a commitment to provide the very best for the residents in the area; “Evolution, Revolution and Innovation – A Cultural Strategy for Shropshire and Telford & Wrekin (2009)” provides a vision that culture will, through partnership working, inspire us all to shape how we live, learn, work and play, and to enrich the life of every resident and visitor in Shropshire and Telford & Wrekin.

Welsh Government have introduced the Active Travel Bill (February 2013) which will encourage Local Authorities to improve the provision for walking and cycling and map routes and improve opportunities so that travel can work in an integrated way. The intention is that cycling and walking should become the normal way of getting around for short local journeys. They should be safe and well signed. Powys County Council are

very keen on the Montgomery Canal as part of this infrastructure and as a resource for local communities. Schools are a good target for walking routes, and in Wales there are 10 primary schools within 1.5km of the Montgomery Canal.

Powys County Council has provided significant funds towards the improvement of the towpaths in Wales, which Canal & River Trust has implemented. A survey by Sustrans in April 2012, taken on the National Cycle Network, Route 81, in Newtown (Newtown Riverside/Montgomery Canal Greenway) indicates that there are 265,091 users of this stretch of towpath, 14,925 are cyclists, 244,336 are pedestrians and 5,830 other users. Generally, in Wales, activities on the towpath make up 94% of canal use, proving that even when canals are navigable, it is by far the land users that are in the majority, although it is acknowledged that it is the scenery, including the boats, that attracts many people onto the towpath.

Shropshire Union Canal Society formed in 1966 to promote the heritage and future use of the 158 miles of Shropshire Union Canals. Their 717 (mainly joint-) membership (May 2013) comes from all over the UK and further afield. They are actively involved in the restoration of the Montgomery Canal, as volunteers, also raising awareness and assisting with fund-raising.

The Montgomery Waterway Restoration Trust formed in 1980 to promote the restoration as a partnership between public and voluntary bodies. The Trust keeps up the profile of the canal at strategic level and amongst local councillors.

Interest groups value the canal environment, evidenced by their membership and particularly the active members who encourage participation on or near the canal. Groups base many of their activities and interests on the canal because of its accessibility and place-making role within the landscape.

The CMS indicates 13,125 boat related "user days" on the connected length to Gronwen Bridge, per year. There are 229,000 other users annually between Frankton and Maesbury (ie approximately the same as the navigable length). Canoeing is increasingly popular. Canoe Wales has taken the lease on a Canal & River Trust Property at Burgedin Locks, and in early 2013 opened a shop selling canoe gear. It also acts as a base for canoe hire; Welsh canals look set to be a major venue for flat water canoeing. Local residents and businesses value the canal and see the potential for it to be improved to offer more services and recreational facilities to residents and visitors alike. The canal needs to be seen in an overall picture of tourism potential in the area, where the journey becomes the experience, and where links with the Cambrian Heritage Railway and long distance footpaths can be strengthened.

**2b Is your heritage considered to be at risk? If so, please tell us in what way.**

The Montgomery Canal is at risk. All canals require risks to be managed - risks of an aging infrastructure, much of it over 200 years old. The cost of reducing risk (ie repairing structures and maintaining water in the canal) is "justified" by the level of use of canals. (in real terms, it is a single pot of money and canals are not expected to "break even", but when prioritising works the canals with the greatest use will have a more compelling case for expenditure). The Montgomery Canal has very low boating levels of use and there is a close relationship between condition and use. It is difficult to justify more than very urgent spend for water supply/flow reasons on the canal, because there are only 4 boats registered on the canal (on the 45 kilometres of canal south of Gronwen Wharf). Left completely unmaintained, the heritage would suffer in terms of:

- The floating water plantain would be seriously threatened by competitive aquatic plant species (many non-native)
- Access along the towpath would be increasingly difficult as vegetation (especially hedges) took over the narrow path
- The locks would fail over time and water supply from the feeders to the system would not be maintainable
- The risk of breach through the canal walls would increase, with catastrophic water loss being the outcome when it did happen
- Over time (and depending on when a breach occurred), potentially within 10 or 15 years, the waterway would turn to swamp and then woodland; and the detrimental impact on the built structures and natural environment would be significant
- The main impact of dereliction of a canal is vandalism and development (eg encroachment or development of land through the planning system)

These issues were studied in depth, generally for canals, when Government was considering the transfer of British Waterways assets to a charity.

"The public benefits delivered by the waterways are largely dependent on the condition and level of usage of the network and the quality of the environment through which it passes. The consequence of the funding gap is that the safe working condition of the network, including the towpaths and associated public access opportunities, will decline and/or sections will need to be closed to navigation." (Impact assessment for moving inland waterways into a new charity in England and Wales, DEFRA, March 2011)

"For instance, as assets deteriorate into categories D and E, each unit of expenditure "buys less" in terms of improved condition than it would have done if in a better grade of condition. Thus the possibility of a vicious circle arises: deteriorating assets require more maintenance which reduces the scope for asset upgrades and repairs, thus leading to further deterioration of the network and which ultimately impacts upon spend on towpaths and access." (Impact assessment for moving inland waterways into a new charity in England and Wales, DEFRA, March 2011)

Canal & River Trust formed in July 2012, taking up the responsibility of caring for the network of canals and rivers previously in the care of British Waterways. As a charity, Canal & River Trust is keen to be seen to support and respond to our customers and supporters enthusiasm to see more canals open to navigation. "Steady state" (ie the level of investment to maintain the waterways in their current condition) demands a higher investment than we currently have to spend, therefore restoration of unnavigable canals cannot be undertaken without very careful consideration. Our directors and trustees have given their support to the continued restoration of the Montgomery Canal, as the first major restoration project for the new charity.

The Montgomery Canal is regularly tended to by volunteer groups, which helps with the repair and restoration of the canal. Alan Jervis, once Chairman of the Waterway Recovery Group said (at a talk for the regional branch of the IWA in 2013) "restoration volunteers create focus and activity and show the demand for canal restoration, but they are not the sole deliverer of restoration – the main thrust has to come from full-time contractors afforded through major investment."

There are a significant number of structures on the draft Powys CC Buildings at Risk Register. The SAC is

currently “unfavourable”, although there is acknowledgement that much of this is to do with the variations across the length of the SAC – many of them a direct result of localised changes in conditions (mostly manmade and with positive and negative impacts on floating water plantain). The Montgomery Canal is considered to be at risk in the sense that it is a wholly artificial habitat which requires constant management. Without this management much of the biodiversity will be lost including the habitats that protected species in the canal rely upon.

**2c Does your project involve work to physical heritage like buildings, collections, landscapes or habitats?**

Yes

**Tell us the name of the building(s), collections, landscape or habitat area**

Montgomery Canal which includes a Special Area of Conservation and some adjacent land

**Do you, or a partner organisation, own the building, land or heritage items outright?**

No

**Do you, or a partner organisation have a leasehold on the building, land or items?**

Yes

**How many years are left to run on the leasehold?**

44 - only relates to the new nature reserve land. The Montgomery Canal is in CRT ownership

**Do you or a partner organisation have a mortgage or other loans secured on the property or item, or any plans to take one out?**

No

**For landscape projects, please provide an Ordnance Survey grid reference for your landscape**

SJ 2274 0747

**2d Does your project involve the acquisition of a building, land or heritage items?**

Yes

**Please tick any of the following that apply to your heritage:**

**Accredited Museum, Gallery  
or Archive**

**Designated or Significant  
(Scotland) Collection**

**DCMS funded Museum,  
Library, Gallery or Archive**

**World Heritage Site**

**Grade I or Grade A listed  
building**

**Grade II\* or Grade B listed  
building**

**Grade II, Grade C or Grade  
C(S) listed building**

**How many buildings of this type are included in your project?**

8

**Local list**

**Scheduled Ancient  
Monument**

**Registered historic ship**

**Conservation Area** ×

**Registered Battlefield**

**Area of Outstanding Natural  
Beauty (AONB) or National  
Scenic Area (NSA)**

**National Park**

**National Nature Reserve**

**Ramsar site**

**Regionally Important  
Geological and  
Geomorphological Site  
(RIGS)**

**Special Area of Conservation  
(SAC) or e-SAC** ×

**Special Protection Areas  
(SPA)**

**Registered Park or Garden**

## Section Three - Your Project

**In this section, tell us about your project. Make sure you include all your planned activities, and capital works if applicable.**

### 3a Describe what your project will do.

"Further the restoration of the Montgomery Canal as a resource for all by continuing the restoration of the dry section of canal channel, restoring canal and boundary structures, through engaging volunteers and employing specialist contractors." -

Working towards the delivery of the CMS, the project will:

- Restore the canal channel (approximately 700metres) between Crickheath Bridge and Lloyds Animal Feed Mill, through volunteer and specialist contractor work. There is a new liner/waterproof membrane which we will be using which requires less overburden (ie it require only a protective layer to avoid being ripped by boats) so will significantly speed up the construction process based on the rate to date. This length includes a winding hole at Crickheath Wharf which will be re-constructed to enable boats to turn around.

- Canal & River Trusts' assets are graded according to condition, from A (best) to E (worst). Within this project it is proposed to repair eight D grade assets (poor) and up to seven C grade assets (fair) on the canal, between Arddleen and Llanymynech, with the aim of improving Powys County Council identified Buildings at Risk. (This is up to 8 Grade II structures restored and 6 assets on Buildings at Risk Register). Repairs will involve vegetation clearance, re-pointing and resetting copings. This work will also involve volunteers and training opportunities and will aim to continue beyond the project via the National Adoption Scheme.

- Repair or replacement of up to 5 km of boundary (mix of sections of hedge-laying, fence building, tree management, dry-stone walling and brick wall repairs) by volunteers. In partnership with the Local Authorities this will strengthen the case for a canal Conservation Area in the future.

"Help secure the future of floating water plantain, an EU protected aquatic plant, by the creation of robust and secure environments for its survival in the form of nature reserves which will be a haven for a wide range of species and a place of interest for visitors. Plus major enhancement works to the canal environment to increase biodiversity and improve the status of a number of rare aquatic plants." -

To add further interest for visitors, we aim to complete the CMS objective of 4.5 hectares of nature reserve in England. At Aston Locks there are currently 1.35 hectares, we will build the remaining area of reserves here. The nature reserves will be carefully constructed to the side of the canal, and will be a hydrological link, so the water is the same in the reserve and canal, plus a gentle flow through weirs and ditches, therefore closely mimicking the conditions of the canal. The reserve will be designed so there are some margins, but also deeper open water, for a range of species. Access will be made for visitors, including benches, information, interpretation and hides/blinds. The development of mixed habitat will also be designed and managed, through tree planting, shrub and thickets and habitat creation for specific species.

To improve the quality of the canal environment, there will be carefully controlled de-silting and vegetation management, focussing mainly in Wales on the SAC with much of the work being done on the two un-navigable sections. De-silting is a common activity on canals, although not regular in any single location. In the case of this barely trafficked canal, it is important for maintaining flows and reducing silt to maximise habitat quality for the rare plants. Through this project we will aim to deliver 5km of de-silted canal. This work will be supported by the construction of new in-channel reserves (up to 0.5km), reduction of invasive species (particularly Water Soldier), coir roll bank protection (up to 1.2km) to reduce erosion and silt, reduction of shade from overhanging trees to create a mosaic of habitats in the water. There will also be a study into the sources of current and potential pollution incidents, working with Severn Rivers Trust, Montgomery Wildlife Trust and local landowners. We plan to improve biodiversity and will deliver a wide range of volunteer tasks and specialist works which will help to improve the canal corridor for birds, mammals, insects and amphibians (see attached table which lists all targeted species and a summary of the associated actions). Tasks are mainly surveys, planting and habitat creation.

"Increase understanding, improve accessibility and celebrate the agricultural and rural origins of the waterway and the developmental influence it had, through landscape improvements, interpretation and projects that will be aimed at specific under-represented audiences of the canal. We will also consider how the Welsh

language can be most successfully incorporated into our activities." -

Through this project there will be an emphasis on opportunities for people to access and learn about the Montgomery Canal, especially its natural and landscape history. We intend improving access and linkages, through the improvement of towpaths, (up to 7km in Wales and some shorter targeted improvements in England), and through improved entry points onto the canal. Powys County Council will aim to fund towpath improvements along the navigable section of canal north from Welshpool. We intend improving, through this project, access and towpath surfacing between Llanymynech and Arddleen. This multi-use towpath will link Llanymynech (which has a very popular Scheduled Ancient Monument heritage site), with Four Crosses and also Burgedin which has a new canoe centre, along with an existing nature reserve and picnic area. We hope the canoeing, cycling and walking along with 7km route will increase as a result of this work.

We will consider ways to improve signage and infrastructure that can support these physical improvements. We also intend to consider ways to improve access onto the water for inexperienced canoeists – which will need to be sensitive to the historic fabric of the canal. Trails, for people on foot, for motorists and canoeists will provide maps and information to improve confidence in using canal routes and also will provide local information so visitors make the most of their journeys. Promotion opportunities and links with other organisations and attractions will be explored.

The nature reserves will be destinations in their own right and will complement the canal as another environment for learning about and enjoying wildlife. Canal & River Trust is increasingly inviting visitors to report wildlife sightings on the canals, and the Montgomery Canal is one the richest for wildlife. We could build on the national campaign to increase interest in wildlife on the canals through encouraging regular commitment from local people to observe their local stretch of canal – monitoring is valuable as it will inform actions in the future. We would also consider offering wildlife safaris (by boat, if possible) where experts (volunteers or staff) can lead groups to help with identification of the variety of insects and plants, or specific events to spot some of the more elusive visitors. There is the potential to make greater links with Underhill Farm in Llanymynech who have creative and environmental event days, or the Preston Montford Field Studies Centre who use the canal for occasional training sessions and walks. CRT's Explorers (previously known as Wild over Waterways) has a pack which introduces children and teachers to the wildlife of the canal, we would plan to build on this and provide further information on the canal (eg water control, living and working on the canal, land uses and geographic features). There is also potential to build on a small number of existing self-guide packs for families and schools (eg the Llanymynech Limeworks pack by Discovering Shropshire's History and the Discovering Llanymynech family guide by the Evisons), to offer complementary activities with other sites and to encourage repeat visits on different topics.

We will aim to fully update the 1994 Architectural Heritage Survey, with volunteer assistance, and look at ways to make the information more accessible to those interested in a professional capacity and those with general interest. We will also continue to promote the canal as a means of less formal learning about canal history, the lime industry and agriculture (interpretation panels were installed in 2008/09 along the length of the canal, using these themes). New interpretation may focus on the wider archaeological landscape, particularly as towpaths give easy access to otherwise remote features. We will be informed by the Community Archaeology work during the Development Phase as to areas where interpretation will be particularly relevant and interesting, plus we will make the key findings of the study available to the public through electronic formats.

Consultation activities on the Lune Aqueduct and surrounding landscape (Marion Blockley, 2010) have shown that it is difficult to raise the image of a local canal above that of other (more exciting) local attractions. Specific events, such as "hard hat" restoration days, canal festivals and high quality family activities were supported by those interviewed as something people would be interested in. The Montgomery Canal is well placed to deliver all of these, as there is plenty of restoration to be done and a mix of town and rural locations which could support canal festivals, events and educational activities. An autumn canal festival could be established, which would link with local produce and the agriculture of the area. Events could take a similar theme, for example foraging days, which might interest families or scout groups, farm visits which may appeal to schools. Event days will also focus on crafts, some related to countryside skills and land management, others will have a more hobby-type focus and could include weaving, basket-making, flower-pressing and painting or photography.

The Lune project also greatly benefited from involving a local artist at an early stage, which generated interest, started to create an identity for the project and also linked the canal with a range of regional features



and places that had already been painted by the artist – making it part of a family of sights and attractions. We are able to link in with a Wales-wide arts programme and have planned an arts residency during the development phase. We hope there will be ideas, led by the community, which will feed in to our delivery phase proposals.

"Expand an already strong local base of active supporters / participants in the restoration of the built and natural heritage of the canal corridor – by involving more people in the canal channel restoration, nature reserve management and boundary restoration." -

To maintain our focus and commitment to the restoration of the Montgomery Canal we intend to provide support, through this project, to the continuing repair of the channel by established canal organisations. SUCS has estimated it can give £100,000 worth of in-kind time to the channel restoration to get the navigable canal to Crickheath. Waterway Recovery Group will plan 6-8 weeks of summer camps in 2016 as part of this project and that could be worth up to £50,000 in in-kind time.

New and existing nature reserves require management to prevent them from getting overgrown. General maintenance would include mowing of paths, management of aquatic areas, occasional tree and vegetation management and checking/clearing of weirs and ditches.

The project will also aim to restore approximately 5km of traditional boundary to the canal. The restoration of the boundary will offer opportunities for people to participate and receive traditional conservation skills training.

The full range of training and participation opportunities could be:

- Countryside tasks: hedge-laying, stock-fencing, dry-stone wall and brick wall construction/repair, habitat creation, hedge-dating (ie to see if there are hedges which pre-date the canal, or contemporary with its construction), and tree planting and vegetation management. We could work in partnership with our vegetation management contractor to maintain skills within their existing workforce or encourage training of people new into the sector.
- Heritage training in specific techniques such as use of lime mortars; which could include learning about the wider industry and how it relates specifically to the lime industry of the canal. There is potential to train our own staff in this way, particularly as there is interest in bringing this sort of skills development into the real environment rather than in workshops/training centres (consider links with Waterway Heritage Skills project which has just received a Round 1 pass – May 2013)
- Monitoring and recording, e.g. heritage and wildlife surveys often need specialist skills, especially if people are doing this without direct supervision. Groups and individuals will also be invited to help with project monitoring and feedback from visitors.
- There is also potential to look at more recreational crafts, and if popular, parts of the canal environment could be specifically cultivated for harvesting reeds, hazel and other species of wood for local use. For the training and activities to be sustainable, there would be a programme of training leaders, educators and guides, developing a ranger scheme and possibly linking with local colleges.

We will look to widen the membership of "Friends of" and other existing interest groups. We will invite local people, businesses and school children to take part, through restoration work parties, wildlife surveys, "rangers" and canal adoption schemes. We would like to focus on encouraging young people to get involved with the Montgomery Canal – potentially through schools - to nurture an interest in the built and natural environment. 15% of 16-24 year olds are neither employed, in education or in training (NEETS) and volunteering on the waterways is something that can provide focus for young people if they find themselves in this situation. Taster sessions, through schools, or a general familiarity with the canal may make the step into regular volunteering less of a hurdle to young people. The Waterways Action Squad project in the NW of England has engaged 900 young people in "work and play" on canals, this is a scheme which could provide a good precedent for the Montgomery Canal. We could also consider a small number of internships to provide a deeper opportunity for involvement for young people.

Our CMS has recommended a register of potential research projects which could be made available on-line opening up opportunities to an even wider audience.

### **3b Explain what need and opportunity your project will address**

The opportunity is for this project to be the first restoration project to be delivered by the new charity, Canal & River Trust, to set the standard (ie balance of social, environmental and heritage needs, not just about “restoration”) and prove to the nation that restoration of redundant parts of the canal network is an objective of the new charity and that such projects offer a fantastic opportunity for people to give time and support.

This project is also an opportunity to make good progress against the CMS aspirations – agreed by the partnership in 2005 and part-funded by the Heritage Lottery Fund. The strategy is aimed at bringing sustainable regeneration to the area.

The need is evidenced by the partnership action, the volunteer restoration commitment and the communities’ strength of feeling. The overall need can be divided into Social, Economic and Environmental reasons:

**Social** – health and well-being are the primary need. Although a rural area may not seem like somewhere where space to exercise is an issue, it is often a lack of confidence in where to go and whether the terrain is manageable. The canal is clearly defined and easy in terms of gradients and surface. PCC organises Trail Tempters (one of which Canal & River Trust helped guide in 2012 in Welshpool) to encourage people who don’t explore the countryside to make that first step. Walking groups who focus on getting elderly, less able-bodied or recuperating members of society out and exercising favour easy walks on good surfaces (Welshpool Gungrog is within the worst 10% areas in Wales for health (Welsh IMD 2011)). Powys has the lowest population density of all the counties in Wales (0.3 persons per hectare - 2011 census). The canal passes through towns and villages making entry onto the canal easy for a wide range of people who don’t necessarily have access to transport. A feature such as this provides community cohesion and a sense of belonging. Employment is another need for local communities. The economic downturn is taking its toll in Powys and Shropshire, along with much of the UK. Although unemployment figures have stabilised across both counties at about 2.5% (claimants 16-64), long-term (over 1 year) youth unemployment has risen sharply since 2011. The canal offers a place to gain skills, regain confidence in doing physical work and meet with new people. All these opportunities can make someone more employable. There is also the opportunity of tapping into an enthusiast volunteer base and widening the scope to draw more volunteers to the Montgomery Canal.

We also have the chance to engage families in activities on the canal – which can be of their own making or organised events. This is a need highlighted by many, about children’s lack of connection with nature, as described in “Natural Childhood” by Stephen Moss, published by the National Trust in 2012.

Another social angle is that of changing perceptions of who canal users are. At a time when access to heritage is maybe seen as the preserve of the wealthy, this project opportunity will aspire to reach a variety of audiences (and is highly accessible – no cost, no opening hour restrictions (except for boaters), no intellectual and very little physical access barriers)

“The majority of boat owners using the waterways are male (79%), and above 55 years old (62%) but in terms of overall visitors there is greater diversity, in particular lower socio-economic grades areas prominent as higher grades. For all canal visitors, there is a slight under-representation of very old and younger people, of females, of people from ethnic minorities and of people from the C2DE social grades. This reflects the general pattern of visits to the outdoors.” (Impact assessment for moving inland waterways into a new charity in England and Wales, DEFRA, March 2011)

**Economic / regenerative** – there is an opportunity to bring more of the canal into use, thus creating more economic activity. Environmental enhancements will increase interest on the canal and also generate more use. The local area needs more of a critical mass of tourism attractions because it lacks the “heritage greats” that some areas can promote. The setting, the border counties between England and Wales, is stunning and provides beautiful countryside and features of interest. Canals have been identified (see Q 2a) as a key theme for Shropshire’s Visitor Economy and Wales has long been synonymous with dramatic landscapes. Canals offer a corridor of opportunity rather than a single hotspot, due to their linear nature. It is not only the physical connection of the canal, but also how it can provide a rationale to visits through themes eg industrial heritage, wildlife, walking routes etc. Local rural services and businesses can struggle to be sustainable because of sparse populations; tourists can make those businesses more resilient – benefiting employment and maintain the service for local communities too.

The project will look to build the heritage tourism sector. In “Investing in Success – Heritage and the UK Tourism Economy” there is mention of significant benefits to economies of heritage based tourism, above a number of the big industries (eg motor-vehicle manufacturing). Tourism also has a wide secondary benefit to hotels and retail etc. Heritage tourism has the added benefit of providing educational environments and sustaining traditional skills.

Environment – the need for the environment is the need to make progress with bringing the canal into wider use, and making it better managed by a combination of staff and volunteers. There is also a need to enhance the natural environment of the canal because of its prestigious assemblage of aquatic plants and to improve the habitats so they support a greater range of animals and birds, which would naturally use these environments but have lost their stronghold. Many species can become isolated due to development and changes in countryside practices, so green corridors are vital to the movement and mixing of populations (highlighted by the recent Lawton Review, Making Space for Nature). The built heritage need is primarily that of sustainable use. Canal structures should not stand alone in the countryside, as relics of times gone by but should be brought back into use within the waterway system and enjoyed and their use witnessed by as many people as possible. The designations and listing of the built and natural heritage are clear evidence of their significance as rare and high quality features which need protection.

The improvements to a (partly redundant) green infrastructure will enhance linkages between communities, tourism attractions and businesses, reducing demands on car travel.

### **3c Why is it essential for the project to go ahead now?**

(also see answer to 2b)

There is urgency for this project in relation to the 14-strong Montgomery Canal Partnership. The partnership strength is its collective knowledge and representation; and its stability is dependent on progress being visible. The time the members give to meet and make recommendations is not insignificant and they are under pressures within their organisations (many attendees are at a senior level in their organisations). The partnership would weaken without a major step in progress in the near future, and without full representation at the meetings it would be difficult to achieve the consensus on future proposals, especially due to the complex nature of meeting all interests. Members of the partnership have invested in a Development Manager to take forward a major bid for restoration; this shows their commitment and has raised expectation.

The question of urgency was discussed at a volunteer sub-group meeting in September 2012. The group felt strongly that the whole restoration will stall without an injection of funds. Volunteer groups will lose drive if there is not another source of effort before they get to the next section (Pryces Bridge to Crickheath). Michael Limbrey, chair of the Montgomery Waterway Restoration Trust talked of latent enthusiasm which will go un-tapped and will ultimately fade.

The Shropshire Union Canal Society has quite a number of elderly members, many of those who volunteer at the weekends on the current restoration length are retired and a number of them plan to retire from restoration work at the end of the current section (Redwith Bridge to Pryces Bridge), it is therefore important to the Montgomery Canal and the Society to look to lower the age range of members and find ways to engage younger people in the physical works. A project like this can raise the profile of the restoration much more successfully than the group could alone. It may only need 5 to 10 people to keep the work party numbers up sufficiently high, but we will need to reach a large number of people to gain that level of regular involvement that will be sustained after the project ends.

Community support, anecdotally, is beginning to tire of talk of the restoration and little evidence of progress. Supporters will speak very positively about the aspirations and potential of the restoration in public situations, but will quickly reveal their cynicism on a one to one basis. Sometimes supporters will reveal their frustration in a public forum, if they think the people who might be able to influence the speed of progress are present. Ultimately our hopes, and their hopes, rest on this application.

### **3d Why do you need Lottery funding?**

The partnership wishes to deliver this project, but with most of the members being statutory authorities, there is no prospect for this project to go forward self-funded. Partners are however able to give their time and the charities are willing to give financial contributions also.

We believe the new HLF strategic framework is well aligned with the project we wish to deliver and there is greater potential to meet the less “economically driven” people and community outcomes which other funding sources of this magnitude place less importance on. We also believe that the cross-border nature of the project makes HLF a very good fit, compared with some other funders who may only fund works in one country or area. We need to find a major funder because we are confident this will attract other funders who can see themselves as one of the “final pieces in the jigsaw”, which is often a preference for smaller scale funders.

### **3e What work and/or consultation have you undertaken to prepare for this project and why?**

The CMS is our guiding document, for which a large amount of consultation was carried out. Resource for Change asked people questions at two different types of event, in 2003/04, towards the CMS. They attended canal meetings and events and asked 500 people who attended to complete questionnaires. 94% of respondents were in favour of “restoration to navigation favouring conservation”. To balance those findings Resources for Change also carried out street surveys and another 130 people took part. 84% were also in favour of this approach.

As there has been only limited development as a result of the strategy we have just consulted within the partnership and refreshed visitor information with some spot-checks at events and on the towpath. The consultation with the Montgomery Canal Partnership looked at an options appraisal, following the rejected bid to HLF in April 2012.

The Montgomery Canal Partnership represents national and local interest groups and statutory bodies. Following feedback from HLF after our Montgomery Canal project bid in 2012, we had a workshop with the partnership to discuss how we wanted to approach a re-submission. After that workshop, summary notes were sent to all attendees and we followed a few weeks later with an options paper. We asked for a decision from all members on the option preferred. The following summarises the options and decision.

Options for revised project scope:

#### Option 1

Submit a very similar bid, with less grant request for same outputs, addressing the presentation-based advice from HLF. No change to capital works.

#### Option 2

A slightly more ambitious project which addresses a number of capital works suggestions by the partnership, which keeps the grant request value below the £5m threshold.

#### Option 3

A considerably more ambitious project which restores to full navigation the entire length of derelict canal in Shropshire. This means that 4.8km of canal would be re-watered and it would physically link with the length of canal in water in Wales, although it would not be fully navigable beyond Shropshire due to dropped bridges on Welsh length.

Decision on new project:

The group were largely in favour of submitting a similar (option 1) or slightly more ambitious (option 2) bid from the workshop and maintained this position when responding to the options paper.

One member felt strongly that completing the restoration of the derelict channel (option 3) was the best option. The practicalities of levering in an appropriate amount of match funding was acknowledged as a barrier, also competing at the annual board (over £5m grant request) was also accepted as being a big risk for a rural canal project, where there would still need to be future restoration phases to achieve complete navigation.

The members discussed the merits of a similar/slightly more ambitious project. The conclusion can be summarised as follows:

- The first bid, in 2012, was supported by the partnership, but maybe was a little under-ambitious. The

partnership felt that the national importance of the canal as a resource, for tourism particularly, was not high-lighted strongly enough

- All project elements should show more clearly how they meet regional and local policies and objectives (particularly in areas of health and environment)
- Additional project aspirations should focus on improving linkages on the canal and to places off the canal (community and tourism, physical and virtual)
- Additional project aspirations should ideally be supported by identified sources of financial backing
- Project partners, being mainly government bodies, are cutting expenditure so cannot entertain the idea of major contributions at this stage, but are committed to supporting the project (with funding, should the bid achieve a round 1 pass)
- 70% of partnership members represent purely Welsh matters or English matters, so to maintain unity within the partnership and to maintain focus on both sides of the border amongst communities, it was agreed that a major project should deliver outputs in Wales and England.

The recommendation therefore was that we should re-submit a cross-border project, delivering more improvements in the way of linkages (which strengthen communities, encourage more walking, give greater resilience to local businesses, voluntary groups and attractions, and enhances a tourism offer which lengthens stays), which has identified other sources of finance where possible, ultimately generating a more ambitious project.

Consultation at Maesbury festival, September 2012:

During a weekend festival, based at Canal Central, on the navigable section of canal in Shropshire, Canal & River Trust had a stall and had a flipchart with the question “what activities would you like to do on the Montgomery Canal – with friends, family, school or work colleagues?”. We received a number of answers (23 in total). Five related to walking, and included trails (2) and access improvements for pushchairs. Two referred to dog walking and the need to improve the infrastructure (ie dog bins and dog-friendly stiles). Boating, cycling, fishing and canoeing were each mentioned twice. There were four creative suggestions: music festivals, art, photography and flower pressing. One respondent highlighted the Heulwen Trust disabled boat trips at Welshpool. Heritage and views were also cited as “activities” people enjoyed.

Canal & River Trust has been involved in developing the Visitor Economy Strategy for Oswestry and North Shropshire. Shropshire Council has lead on this process and it has involved a number of workshops across the north of the county and has been attended by businesses, local government and interest groups. Canals were highlighted as jewels in the areas crown at the events, across the board, and it has led to the “canals and meres” primary theme in the final strategy. (see 2a)

In March and April 2013 SUCS conducted towpath surveys, along a section of the canal which is either recently restored or under restoration by that group. Due to the unusually bad weather there was a fairly small sample (47 respondents). We gained some interesting information, including in the final comments section (37 answered), 14 of them wanted further restoration, or complete restoration of the canal – a further 10 commented specifically on towpath improvements, which is fewer than channel restoration, and bearing in mind all of them were walking the towpath when stopped. Pushchair and wheelchair use were both mentioned once. Two thirds of the visitors arrived by car, 87% starting from home and two thirds describing themselves as local. This indicates that there should be benefit in promoting the canal and providing better signage to gain more tourism use. One fifth were visiting for the first time, which was very positive considering the weather. We also asked them if they would visit more frequently if condition and maintenance was improved, and 64% said they would, which was also a good indication as many were regular visitors anyway. Consistent with national Canal & River Trust surveys, peace and quiet, plus the natural history were the most important aspects of the canal environment.

The Development Manager has met with a number of key groups which have heritage, environment and tourism interests in the local area which has helped root the project more firmly in the local area. Those groups include: Llanymynech Heritage Partnership, Powysland Museum, Tourist/Visitor Information Centres, Dyffryn Tanat and Region Development Trust, Oswestry Town Council, Oswestry Heritage Forum, Shropshire

Walking groups, Severn Rivers Trust, Heulwen Trust and Cambrian Heritage Railway. All the groups offer valuable links to the project and vice versa, particularly in relation to access and sharing information/promotion. There is a very exciting link with the Dyffryn Tanat and Region Development Trust and their proposed project to open up parts of the Porth-y-waen quarries and limekilns. The quarry had a tramway to the Crickheath Wharf – where we intend reinstating the winding hole and having it as the new temporary limit for the Shropshire section of the navigable canal. The Community Archaeology project and the scope for interpretation of that site will link in to a small scale destination and picnic area (with a potential mooring basin) and a possible walking route (on the old tramline) up to the quarry area.

## Section Four - Project Outcomes

**In this section, tell us about the difference that your project will make for heritage, people and communities.**

### 4a What difference will your project make for heritage?

Heritage will be better managed (w) -

We have a Conservation Management Strategy, which gives us a strategic framework for restoring and managing the canal. Through the Development Phase we will supplement this strategy with specific actions related to the project proposals, along with budget costs. There will also be a heritage impact assessment of the project actions and their effect on the canal environment. Our outcomes will be:

- 12 km of canal channel, connected to the network, is fully navigable - By restoring another 700m we will be able to make a further 2km fully navigable, an increase of 20% on the 10km currently navigable for narrowboats. This will result in the 800m stretch of canal restored in 2007, the 430m stretch SUCS are currently rebuilding, and the project 700m length, all being maintained to navigable standard.
- We will agree a revised management contribution from Shropshire Council for the newly navigable 2km of canal and for the Gronwen to Crickheath section, making it more sustainable to manage financially
- We will know more about our natural heritage through ecological surveys / Common Standards Monitoring during our development phase, we will include further monitoring throughout our project and following the CMS – monitoring will inform management. Knowing what species and conditions we have and the way habitats evolve over time will help us plan how we manage our natural heritage. One outcome will be minimising incidents of invasive species.
- We will write a management plan for the new Aston Reserves and update existing reserve management plans.
- We will write a best practice manual for managing canals which have L natans
- We will manage water quality risks better as a result of a study which will identify existing problems. We will then be able to identify actions to rectify the water quality issues
- We will work more closely with restoration groups so that environment enhancements are included when appropriate within channel restoration works
- We will have a number of adoption groups (aim for a minimum of 3) who will take care of specific lengths of canal or certain features (eg litter pick, vegetation management, painting etc)
- Boat numbers will increase in England (after approximately 3 years from project completion) there will be a potential increase from 2300 (now) up to 5000 boat movements per annum, generating more income for the waterway and supporting increase in spend on maintenance

Heritage will be in better condition (w) -

This project will bring the two watered sections of canal nearer to each other and will make the aspiration of a restored navigable canal closer to reality. New nature reserves and improved canal in tandem with better management techniques and a stronger volunteer base, will result in our heritage and environment being in better condition.

Working towards the delivery of the Conservation Management Strategy, the project will achieve the following:

- Up to 3 hectares of new aquatic reserve providing a more suitable habitat for a range of aquatic plants and greater biodiversity
- Improved canal habitat in Wales providing a more secure environment for floating water plantain, securing one of the most important habitats for a European protected species, in the UK. The improvement in canal condition will include a reduction in silt in the water as a result of de-silting works, new soft bank protection,

and reduction of tree cover which reduces leaf-litter.

- 700m of canal channel rebuilt between Crickheath Bridge and Lloyds Animal Feed Mill, by volunteers, and some works by specialist contractors

- Up to 7km of towpath will be improved on the basis of the character of the location and predicted use levels

- Eight D condition grade assets will be repaired (and up to seven C condition grade assets) on the canal, with the aim of improving identified Buildings at Risk. (Total, if all restored, 8 Grade II structures restored, and up to 6 assets on Buildings at Risk Register (currently only in draft form) either removed or status improved).

This work will also involve volunteers and training opportunities and will aim to continue beyond the project via the National Adoption Scheme. The D grade structures are:

- o Br 97, Wern bridge
- o Carregohofa Locks 1 and 2
- o Sluices 10-12 (Newbridge, Four Crosses, Maerdy)
- o Sluice 1 and Br 2 on Tanat Feeder

- The recording of boundary condition and the repairs to, or replacement of, up to 5 km of boundary (mix of sections of hedge-laying, fence building tree management, dry-stone walling and brick wall repairs). In partnership with the Local Authorities, this will strengthen the case for a canal Conservation Area in the future – adding a further layer of protection.

Heritage will be better interpreted and explained -

We know a substantial amount about the history of the Montgomery Canal, much of it described in published books (eg The Archaeology of the Montgomeryshire Canal, Stephen Hughes, RCAHMW). There are areas where we could learn more or provide better explanations to people interested in the canals history. Expertise within the partnership (including Stephen Hughes) and project team will look at the gaps and opportunities and influence the interpretation and methods of communication.

We have identified feature types for our Community Archaeology activities, including lime kilns, wharves and boundaries. We hope this study will provide information about links with industries (and agriculture) and we will interpret and explain the information we gather.

We will:

- make the information we gather available to specialists and potentially “general interest” through “Discovering Shropshire’s History” or similar web-based formats.

- link with the Trails Mid Wales app to provide detailed routes and site specific information about the canal, associated structures and adjacent heritage and landscape features

- follow on from our recent trial of a QR trail in Welshpool, and provide appropriate information for hard to reach audiences which will engage more people through Smartphone technology (eg family-focused canoeists QR trail in partnership with Canoe Wales)

- link with associated attractions and projects including Llanymynech Heritage Limeworks and the Dyffryn Tanat and Region Development Trust to look at ways to provide on-site interpretation through artefacts, art and living interpretation.

- deliver a package of interpretation and learning around the Aston Reserves and will provide a second tier of information and events for the smaller reserves in Wales

- provide a range of information about protected species for different audiences. Plus inform people of our wider biodiversity work. This could include information to encourage visitors to be more aware of their impact on habitats and ways they can minimise it.

- reinforce the links with agriculture and the canal and the significance of the countryside, through family-based and young people based walks, “have-a-go” sessions and events.

Heritage will be identified and recorded-



Archaeological recordings, research and investigation will form a community archaeology activity during the development phase (with possible extension in the delivery phase). We will focus on limekilns and wharves (ie ways in which the canal interfaced with other industries). We are keen to work with other heritage interest groups (including Dyffryn Tanat and Region Development Trust) to make links with related sites (eg Porthywaen Quarry)

In addition to this we will:

- work with trained/skilled volunteers to update the 1994 Architectural Heritage Survey and to provide another layer of information looking at tramways, wharfs, boundaries, mileposts etc
- undertake ecological recording / Common Standards Monitoring through the development phase and assess what features we should survey again before the end of the project. We have possibly the best location in the world for L natans and also the best UK site for P compressus, and as such the populations and habitats should be carefully monitored.
- work with Friends of the Montgomery Canal and other groups to agree on species of wildlife which we want regular periods of recording for, to assist with planning our project or on-going management. This could include working with young people on a "Day Book" project to record wildlife on the canal.

#### **4b What difference will your project make for people?**

People will have developed skills (w) -

People will deepen their relationship with the canal and will learn skills and receive training. These skills may be the tools to further engagement on this canal, or involving them in different heritage or environmental projects. The training could spark an interest and a career in the heritage or environment sectors; leading one day to those individuals we trained being the trainers of tomorrow.

We hope that people will engage with the project in many ways. Their motivations will be very different, some may want to help with activities because they already have specific skills, others may want to participate because they want to learn new skills. Through delivery of our planned actions and activities (further information will develop through our Activity Plan) we will allow for types of formal and informal training. Our aspiration is to train 45 people during the delivery phase. There will be one apprenticeship placement working alongside a Countryside Manager. We hope there will be other ways where skills are passed on between experienced and in-experienced volunteers and staff. These will be measureable to varying degrees, and we hope to capture evidence of the range of development of skills across the project.

Skills and training will fall into the following categories:

- Countryside skills and environmental enhancements - habitat creation, hedgelaying, coppicing, Willow spilling, hurdle making, fencing (post and rail, post and wire), steps, benches and other access works
- Heritage and construction skills – building and labouring skills, repointing and building with lime mortar, driving plant, site management and health and safety
- Interpretation, education and event management – including living heritage event-based interpretation, leading wildlife safaris, school groups education volunteer roles
- Survey work (heritage and environment) – Architectural heritage recording (and using portable IT), archaeological recording through community archaeology, recording species and identification techniques which will inform visitor information (eg blogs, noticeboards, interpretation) and management plans for canal and reserves.
- Visitor surveys – to show project outcomes, outputs, guiding our project proposals and informing us of changes we can make to our events etc.

We hope some new volunteers and people we have trained will become active members of canal groups and will be motivated to continue restoration and maintenance tasks on the canal after the project ends.

People will have learnt about heritage (w) -

We aim to help people learn about the significance of the Montgomery Canal through a diverse and active learning programme. The programme will be made up of three elements:

- On site interpretation provision and additional interpretation through web/smartphone formats
- A formal education programme linked to the national curriculums in England and Wales
- An informal learning programme of events and activities

We have identified some target audiences; walkers and other informal users, day/short stay visitors who may be visiting in conjunction with other attractions, local communities (especially families and young people) and school groups.

We will develop our ideas through a learning plan which will be coordinated with the Activity Plan. However at this stage there are a number of ideas for learning:

Interpretative trail leaflets – for people on foot/cycling, canoeing and aimed at the motorist.

Project website and social media - presence and links with other websites/ smartphone media including Trails Mid Wales and Discovering Shropshire's History.

Interpretative displays – to be developed alongside ideas for uses for derelict small buildings on the canal (eg the hovel on Aston Locks). One possible idea is a projection of the workings of a lock – created in partnership with an artist.

Formal education – delivered between Canal & River Trust staff, education volunteers and the Community Development Manager, we will aim to work with at least four schools within 2km or so the canal corridor on bespoke projects to meet the needs of those schools. Examples including; temporary exhibition where children interpret part of their local heritage; A blog linked to an existing website where they can write about learning experiences and share them with others; poetry or storytelling; film-making to create a short animation based upon the heritage; art projects with a view to a temporary art exhibition on the canal; wildlife day book project where children will explore the natural habitats and record their findings.

Informal learning – including have a go sessions, wildlife safaris, foraging/food/farm activities, canal arts and crafts. There will be a festival, hard hat restoration days, craft skills, shared events with other groups (eg Llimeys – who are friends of Llanymynech Heritage Area) and there will be links with outputs from the formal learning activities.

Use of the Welsh language will be considered across a range of activities through the project, we will provide the majority of written material in Welsh and English and will look at creative ways to make the Welsh language an integral part of some of our activities – potentially through story-telling, poetry or art.

We expect some ideas from the arts residency at development stage will influence and feature in our interpretation and learning.

Some of the particular themes of learning includes:

Environment – biodiversity and habitats, the balance between management, tourism and environment (including sustainable development ideas), identification of species (people will be invited to send us their sightings to build up a picture of the wildlife on the canal).

Heritage – the story of building the canal, food production and lime industry, life on board canal boats, business and trade, the restoration of the canal.

People will have changed their attitudes or behaviour -

The principle change we hope to see, and it is already at a very good level, is an increase in the number of people who wish to take an active part in life on the canal. The canal is a resource for everyone, and even if individuals don't see the canal as a backdrop to their own activities then they should be able to appreciate the value it has for others (people and wildlife) and want to help with maintaining it. A new method of volunteering

will be via Adoption Schemes, where communities or businesses will choose to take on the maintenance of part of the canal. We hope there will be three of these groups by the end of the project.

We want there to be more local visits to canal i.e. people will choose to take part in a leisure visit within their regular local economy.

We also want there to be more national visits to canal (i.e. holiday at home tourism) and as part of a longer stay (ie a weekend instead of a day visit, therefore generating greater income to area through overnight accommodation and eating/drinking). The Welsh (and Shropshire) Marches, particularly in the Severn Valley and below the range of Breidden Hills, is a particularly beautiful area and could become a much more important visitor destination. There is great potential for outdoor pursuits to be taken up more widely in the area; including walking, canoeing, cycling and horse riding. These types of activities may not be for the very adventurous, but they fit well with our aspiration to encourage more families and young people.

We would like many more people to see the canal as part of the journey/holiday instead of simply a destination – the canal can act as the basic thread of the holiday, offering a means of moving between activities, destinations, accommodation and refreshment-stops. Thus giving a much greater appreciation of the links between these places, geographically, socially, historically etc.

More responsible boating is another desired behavioural change (i.e. reducing impact of canal channel habitat). This could take the form of reducing speed from 3mph to 2mph to reduce wash. Also boaters could consider types of washing detergents they use based on them being less harmful for the environment. (we are looking at the possibility of messaging boaters as they enter the Montgomery Canal to alert them to the sensitive habitats and ask them to take extra care).

We also hope that dog owners will change their behaviour and leave less dog fouling; this may come about through extra people being on the towpaths and water. We expect we may need to be more proactive and get the message across to irresponsible dog owners (there isn't a specific project action at this stage, but it is likely to develop out of further consultation).

People will have had an enjoyable experience -

Improved participation, understanding and familiarity will enhance a sense of place and the canal will act as a spine joining places and linking their shared histories.

People will have enjoyed being able to narrowboat along the canal an extra 2km – from the junction with the Llangollen Canal. We calculate that there will be around 0.5 days additional time on the canal per cruise. Visitors may therefore link up with the Cambrian Heritage Railway or walk to Llanymynech or have a meal at Maesbury Marsh as a result. People will also have been able to enjoy improved routes on the towpath between the settlements of Arddleen and Llanymynech.

We want people to view the canal as a backdrop to carrying out events and activities they want to do – making the canal environment their own. (eg Scouts doing crafts, canoeing, geo-caching etc). People will have attended festivals and events.

We intend holding intergenerational events where different skills and interests can come together. Our nature reserves will give us the opportunity to grow and harvest things which people can enjoy, such as reeds and willow for crafts, they will provide different environments for photography and painting.

People have already told us that they enjoy the surroundings of the canal (heritage, views, wildlife) and we hope to encourage more enjoyment of these things, either through guided walks and safaris or through practical work parties where these attributes can be maintained and enhanced. The canal and the wetland nature reserves will offer places for these interests.

People will have volunteered time -

Our volunteering strategy for this project very much reflects our objectives as a trust in “Keeping people, nature and history connected”. The canal by its very nature is a living link to the past, a vibrant corridor for wildlife and a great environment for people to relax and learn. Volunteering activity will seek to add breadth and strength to those links through a comprehensive program of activity and events which will provide

engaging opportunities for people to get involved and help us deliver on our objectives.

Central to this is our desire to engage with the local community as fully as possible, and this will be achieved through regular group and specialist individual volunteer activities, recruitment of education volunteers to engage with local schools, volunteer lead walks and work parties to promote regular exercise. We will build links with local health providers and charities, youth organisations, volunteering agencies, local parishes and organisations supporting people into employment to reach as wide a cross section of the population as possible. We have started to look at the barriers to people volunteering and in many cases it is down to the lack of travel options for people to reach rural locations. This we hope to address through acquiring a mini-bus for pick-ups or working closely in partnership with volunteering organisations who may be able to provide assistance with travel. With a carefully developed training program to support volunteers using heritage and practical countryside skills, and a range of educational activities to suit people of all ages we will offer opportunities for people to learn at all levels from casual interest and engagement to helping people improve their chances of employment.

The volunteering program will seek to engage local people in managing and maintaining the wonderful heritage of the waterway, both built and natural through a program of training and activity. We will conserve and protect the many historic lime kilns, bridges, locks and the waterway by carefully managing vegetation and where possible utilising heritage skills training enabling volunteers to repair the structures in our care. We would also carry out a volunteer based survey of the heritage (updating and adding to the Architectural Heritage Survey undertaken by the Trust in 1994) in its current condition with photographic record and develop interpretation through archival research.

Off-line and in-channel nature reserve management and management of the main line of the canal is a fundamental aim of our volunteering activity. We will provide great learning and training opportunities for volunteers, and ensure that these valuable wildlife sites are also accessible to schools and local people as a learning resource through careful development of improved access balanced with the aim of providing a haven for wildlife. We shall also undertake a significant program of wildlife survey work supported by training to ensure that we monitor and record the improvements for wildlife throughout the life of the project and beyond. For example we will carry out surveys of butterflies and moths to identify populations of species in decline and improve habitat through specific hedgerow, rough grassland and tree management work undertaken by volunteers. (see attached table of actions and species they are aimed at).

Throughout the project we will aim to develop volunteers skills and experience to enable greater volunteer involvement and build a resilient network of volunteers which will enable continuation of benefits beyond the timeframe of the project. We will also consider working in partnership with the other organisations including the Wildlife Trusts to adopt a landscape approach including the canals as well as the surrounding countryside.

All of these aspirations need to fit with the established voluntary sector groups who give a great deal of time to the canal. Their support will continue during and after the project, but it is projects like this that help to reinvigorate their support and commitment, because the scale of the restoration is large and it is only achievable through a number of sectors working together, plus major investment at critical stages. The group who will contribute potentially half of the total volunteer in-kind time is the Shropshire Union Canal Society. Other groups who will also devote time to the project are: Waterway Recovery Group, Friends of the Montgomery Canal, Inland Waterways Association, Montgomery Waterway Restoration Trust, Wildlife Trusts (Montgomeryshire and Shropshire), The Trust for Conservation Volunteers, and more.

People will volunteer on the restoration work to restore the canal channel, to improve access on the towpath. They will have carried out conservation works to structures and conservation management and enhancements for the natural environment. Volunteers will have delivered education activities, events, taken part in recording, assessments and monitoring. In total we anticipate that there will be £114,000 worth of skilled volunteer time, £93,000 worth of unskilled in-kind time and £79,000 worth of professional in-kind time.

#### **4c What difference will your project make for communities?**

Environmental impacts will have been reduced -

The project will have a positive impact on the immediate environment, particularly as habitat quality, canal repair and extensions to nature reserves are the thrust of the proposals.

50% of spend during this project will be directly for the enhancement of biodiversity and for the protection of rare species.

We will aim to achieve overall nature conservation enhancements through:

- Improved structural integrity and less risk of major incident
- Improved connectivity and linking of populations
- Increased populations of aquatic macrophytes, through new reserves and in-channel net gains
- Increased area of marginal vegetation
- Higher quality terrestrial habitats
- Improved accessibility, interpretation and education of this unique habitat

Through careful study of this canal and others with the same rare aquatic plants, there is agreement across the Montgomery Canal Partnership to the creation of in-channel and off-line nature reserves to safeguard the rare plants. In-channel reserves are in existence on the Welsh section of canal and their purpose is to provide a protected margin to the canal where silt and wash can be minimised. In England and Wales there are off-line reserves (ie outside the limits of the channel, but with hydrological connectivity) which will continue to be constructed up to agreed aquatic reserve areas. Reserves off the canal have many benefits, not least the fact they can be designed to be more secure from the effects of breaches and consequent loss of water and can have an ideal mix of margins and open water for maximum benefit of biodiversity. The diverse canal environment is constantly under threat from species succession and requires careful management. Other vulnerabilities including water quality, for example eutrophication from agricultural run-off and build-up of silt. Water quality varies between the English and Welsh sections of canal (which are currently separate bodies of water) partly due to the sources of water. The feeders from the Severn and Vyrnwy in Wales provide a cleaner source of water than the Llangollen Canal and River Dee in England. We intend offering a graduate research study into water quality during the project to look at the potential sources of pollution, to enhance the information the EA and Natural Resources Wales already analyses.

We are not planning development in the form of new buildings, but there will be construction works (channel building and nature reserve creation, plus structure repair), so these will need to be carefully designed and planned. Employment of local contractors is an aspiration, but we will tender contracts in a fair and legal way. (Use of local contractors and suppliers fosters greater ownership within the community). The land at Aston Locks which we are leasing and will construct the reserves on is species poor rush-dominated grassland, so will be improved in quality through the mix of open water, marginal habitat and small areas of grassland. The new canal channel liner is more suitable to the purpose and as such will not need as much concrete block covering as the previous system. The order in which sections of the canal will be reinstated will be determined by a cut and fill analysis, which has been substantially completed by a volunteer engineer. This means that lengths where they may be an excess of spoil can be completed before areas where spoil would need to be imported, therefore managing material on site with the minimum being sent off as waste. In the nature reserves the overburden for the liner will just be earth from the excavation of the ponds. Similarly any other spoil will be reused on site where possible. We will design a range of aquatic habitats in the channel cross-section as well as liaise with landowners to look at options for complementary ponds adjacent to the canal where they will be beneficial. This is particularly in response to reports of great crested newts in the section of derelict canal we wish to rebuild. We are undertaking newt surveys this summer to establish the size of the population.

Habitat and water quality will be enhanced – the CMS has particularly high-lighted the need for positive management of the SSSI through a de-silting programme. Habitat improvements could have detrimental effects on other parts of the landscape, if dredging material or vegetation are left on land or sent to landfill. This is not always a requirement, sometimes dredgings can be used as fill behind bank protection, or mixed with other material to make them easier to reuse. In 2012 we trialled techniques of channel reserve management, funded by Welsh Government.

We aim for an increase in visitor numbers, as a result of the project, but this will be a combination of local people and those visitors coming to or through the area anyway, so we just hope to increase their dwell time.

In the medium term, there will be an effort on behalf of the Cambrian Heritage Railway, Canal & River Trust and Shropshire Way partners, to encourage sustainable tourism in the form of walking, boating and railway journeys as the way to explore Shropshire and the borders. The canal can therefore be part of the journey as opposed to the destination, and its length and proximity to towns and villages, should encourage people to explore their local stretch by bicycle, boat or on foot.

Water use will be increased because we will build a wetland and open up more canal to navigation generating boat movements – although there will be no locks on the new stretch, so in effect none will be lost (evaporation from the surface will be a form of loss from channel and wetland, but should be replenished by rainwater).

The CMS guides our proposals and establishes the fact that sustainable restoration has to be through a balance of socially, environmentally and economically driven actions for the canal to truly thrive.

More people and a wider range of people will have engaged with heritage -

The project will increase a sense of place in the local area and it will help describe the narrative to the way the landscape has changed and trade and industry has developed since the late 1700s. Increased use of the canal as a place to walk reasonable distances (and it is generally a very good surface for less-abled walkers) will encourage people to make links between towns and villages they may already know, with new settlements, new communities and the wider landscape. A family trip to a canal is not necessarily a big commitment in terms of time, money and travel (in the way that many tourist attractions may be) because they are near to communities and are free to access, so they can offer rich experiences in an informal way. Learning and participation may happen when the visitors are open to it, in a way that most suits them, rather than a prescribed experience at a formal visitor attraction.

Through the restoration work we hope to do, there will be improved community wellbeing as the reserves and further restoration will provide ways for people to be involved and will offer, when complete, a backdrop to events and activities. We aim to make stronger links with established groups and organisations, provide better information and support growth of the Friends of Montgomery Canal. We aim to engage some of the harder to reach audiences, with the hope of engaging more young people and families (in the 2010 Inland Waterways Visits Surveys, only 11% of visitors were 16-24 - as a group they make up 16% of UK population).

We hope to see greater engagement from:

Tourists – those outside the local economy will visit in higher numbers and there will be a tendency to stay longer and engage with related attractions, which will link with the canal in some form

Local communities (local business and services as well as inhabitants) – we aim to involve more local people, encouraging them take ownership of their part of canal and maybe be part of an adoption scheme, which means they will take an active role in maintaining an area or structure. One specific examples is there will be more residents from Llanymynech, Four Crosses and Arddleen accessing the canal, as a result of improvements to the towpath.

Local families – there is a perception that canals are for people who can afford canal boats and are generally retired. We aim to challenge this perception and encourage people, through events, festivals, safaris, family-focused fun days, to try the canal out as a resource for the things they want to do.

Canoeists – Shropshire Paddlesports and Canoe Wales (both charities/third sector) are very keen to get more canoeists on the canal. Canals across Wales offer the opportunity for high quality flat water paddling experiences. The Montgomery Canal, for the medium term, has the added benefit of very few powered boats. This offers a safe environment for families to explore, by canoe, in beautiful settings. Through access improvements (in and out of the water) Canoe Wales have indicated that we could expect to build from 100 new paddlers (2012) to 5000 newcomers per annum after five years.

Volunteers – the Montgomery Canal has a wealth of volunteers already, but the volunteers are traditionally driven by the desire to boat the canal – so restoration is the chief activity. The Montgomery Canal triathlon (now in its second year) is an example of a wide community and a range of interests coming together to put on an exciting and complex event, which brings the whole canal into use. In 2013 there were 60 marshals at the event, helping participants at road crossings.

Your local area/community will be a better place to live, work and visit -

By making progress towards a fully restored canal, the project will bring more people onto the canal, generating economic activity, providing rural resilience, increasing skills and bringing about greater community cohesion.

Local communities (local business and services as well as inhabitants) – we aim to involve more local people, encouraging them to exercise on, and where possible travel along, the towpaths. Local services and businesses can be bolstered by a mix of tourism and local patronage, making them more resilient.

As we address some of the barriers to participation through the Activity Plan process we will consider ways in which we can make volunteering with us on the canal more accessible. We will look at either buying a mini-bus for pick-ups (eg in town centre) and taking people to the remote sites which many of our activities will be based at. We will also consider how we can work in partnership with The Conservation Volunteers, or Groundwork and Wildlife Trusts, to recruit and put in place a flexible approach to making getting to our volunteer tasks as easy as possible. Unemployment presents all kinds of barriers and we hope people will be able to volunteer for us and then feel their chances of employment are better.

We have reason to believe many people who already use the Montgomery Canal feel it is a safe place to be. National surveys have indicated that people who don't use any canals have an image of the canal being contained so that it becomes difficult to get off it once you are on it. (ie not many entry and exit points). Another misconception is that the canal is only for boaters, and that boaters are a certain type, and that it is quite a cliquy activity. We want to break these misconceptions, and make a wide range of people feel the canal is theirs to enjoy. More people will inevitably help with the perception of a place being unsafe, as their will be public policing, this will also hopefully reduce dog-fouling of the towpaths which is often cited as an unpleasant aspect of the canal environment. Restored waterway, repaired boundaries, well maintained structures and towpaths will all go together to make the canal seem more attractive and will help reinforce a local identity and foster a greater sense of local ownership.

Your local economy will be boosted -

We believe that the local economy will be more resilient. The area around the canal is generally thinly populated, there are three market towns either on the canal or nearby, but otherwise the surrounding area is very rural. There are quite high numbers of self-employed people and small businesses. A canal, which brings tourists, will help support the tourism industry but will also increase demand on many services which makes them more sustainable for local residents. The cost versus return of a major restoration project does not make a strong argument for the restoration, but when viewed in the context of resilience and cohesion of local communities and economies, it is a powerful player in the regeneration of the area.

The Montgomery Canal Economic Development Study (Resources for Change, April 2011), which looked at the benefits of extending the navigable canal to Llanymynech (ie 5kms, of which we are hoping to restore up to 0.7 km as part of this project), found that the economic impacts will at best make it only marginally viable (depending on the assumptions made), but what it did suggest is that the resilience for rural businesses would be improved. Tourism would enable local facilities and services to prosper which in turn sustains them for communities, encouraging greater community cohesion and well-being. With increased restoration activity and further investment in the canal there will be an increase in confidence in investment in businesses such as trip boats, waterside pubs and cafes and increased support of existing volunteer and charity run attractions. Small increases in income can make the difference between survival and closure of businesses and charities. The area likely to receive the benefit is an emerging tourism triangle from Llanymynech to Ellesmere to Llangollen. Llanymynech has great potential to build on the Heritage Limeworks area (which has Scheduled Ancient Monument designation and is a SSSI), with the canal adjacent and cross-border partnership working via the existing partnership.

Local assets such as wildlife and heritage sites need to be conserved to gain maximum value; if developed in a sustainable way they make a more resilient economy at an appropriate level for a rural area.

The nature reserve creation provides a number of opportunities to engage the local community and provide a tourist offer which may encourage other tourist activities in the immediate area. The new reserves at Aston Locks could add to a proposed visitor offer at Queens Head (less than 0.5km away) which may come to

fruition in the next few years. The development by Morris Leisure is proposed to include an 80-berth marina and farm shop, amongst other facilities. The build of this kind of critical mass makes services (eg public transport) and shared promotion viable.

At Crickheath Wharf we intend reinstating the winding hole and having it as the new temporary limit for the Shropshire section of the navigable canal. There will be a small scale destination and picnic area (with a potential mooring basin) and a possible circular walking route. In the medium term Canal & River Trust and the Cambrian Heritage Railway aspire to a similar small scale destination at Waen Wen, approximately 1.3km away from Crickheath Wharf. Here there will be the possibility of visitors alighting, or joining, the Cambrian Heritage Railway at the canalside (on Penygarreg Lane).

In Powys there will be more economic activity at Arddleen, Four Crosses and Llanymynech – where there are shops, pubs or services which will benefit from greater use.

#### **4d What are the main groups of people that will benefit from your project?**

Supporters of the restoration of the canal and those yet to learn about the canal will benefit equally from the project. Local people will have an improved resource and local community services and tourism businesses will see improved resilience.

Local people and businesses will benefit from the increased use of the canal and usability of the canal. Visitors in the form of local people, day visitors and holiday makers will benefit also; a small but important group are boaters, or boat-based tourists (hope for a 4500 increase in “crew-days” per annum), but in terms of numbers those on land will be the most significant (increase of 10,000 visits to the towpath and 20,000 to Aston Nature reserves). New paddlers will be a group we want to grow, and our aspiration is to see an increase from 100 newcomers in 2012 to 5000 within 5 years of the project ending. There will be an increase in occasional canoeists of around 2500 after five years.

We will particularly aim to encourage participation from youth and families, as these are under-represented. Some of these opportunities will relate to better access routes along the canal between home and school or other community facilities. Cyclists will be catered for, but we need to balance their use and enjoyment of the towpath with the needs of walkers.

More traditional users of the canal, for example couples and older age-groups, will also benefit and greater ways for them to get involved will also be explored. There is potential for intergenerational activities and passing on skills. With youth unemployment being so prevalent there is the potential for teenagers /school leavers to make a gradual step into training or the workplace by joining restoration and management activities on the canal.

Volunteers, both existing and new, will be able to take part in restoration parties, surveys, events and other activities. Volunteers will have the opportunity to learn new skills or enhance existing ones. This could lead to employment opportunities or a continuing commitment to the canal.

(figures for existing visitors is based on Sustrans survey in 2012, indicating 265,000 visitors in Newtown, then assuming an average of 9,500 people per kilometre for the remaining 55 km - based on surveys in 1996).

#### **4e Does your project involve heritage that attracts visitors?**

Yes

#### **What are your existing visitor numbers?**

795000

#### **How many visitors a year do you expect on completion of your project?**

825000



**4f How many people will be trained as part of your project, if applicable?**

45

**4g How many full-time equivalent volunteers do you expect to contribute personally to your project?**

4

**4h How many full-time equivalent posts will you create to deliver your project?**

2

## **Section Five - Project Management**

**In this section, tell us how you will develop and deliver your project.**

## Development phase

### 5a What work will you do during the development phase of your project?

(See attached development phase plan).

A Project Manager will be recruited to take forward the work required during the development phase if a Round 1 pass is granted. This person will be supported by a Community Development Officer (part time) who will take a lead role in the Activity Plan. There will be Trust staff who will support these two project roles, plus there will be volunteer opportunities. The main tasks are:

#### Ecological surveys

The environmental quality of the Montgomery Canal has been understood to varying degrees since the late 19th century. There have been surveys, completed by Canal & River Trust and Statutory Authorities to monitor the condition of the waterway. As part of this project we aim to get an up-to-date snapshot of all aspects of the canal environment, through appointing an external consultant who will also recruit volunteer assistance. The surveys will inform the habitat enhancement works we will deliver in the main phase of the project and help us plan management and further monitoring.

#### Designs for nature reserves

The nature reserves site has been identified; the site will need some surveying work focussing on the ground conditions because of the high water table. We will need a consultant (Engineer) to provide more detailed plans than we have currently (RIBA Stage C to RIBA Stage D) to provide final levels and profiles for the water-space of the reserves and detailed solutions for the pipes, ditches and weirs which will allow the canal water to flow through the reserves and back into the canal. These designs will be informed by the WWT Wetlands Advisory Service design guidelines for creating aquatic habitats. Cross-sectional information and construction details will enable us to gauge costs for the construction work. We will also liaise with experts within the volunteer group(s) to discuss aspects of the project (probably footpaths, benches, tree planting and habitat creation) they will be willing and able to carry out.

#### Topographical survey

A survey of the levels of the site is needed before the designs can progress.

#### Channel Restoration engineering designs

The channel restoration works have cross-section construction options already designed by our Technical Solutions Engineer. Our in-house engineer will continue with these designs, determining which solution is applicable to which length of canal (700m between Crickheath Bridge and Lloyds Animal Feeds Mill), this will include the winding hole at Crickheath, which will need new sections providing. We have made an allowance for Land Agent Fees to cover negotiations with adjacent landowners regarding temporary access and possible compensatory habitats for newts.

#### Community Archaeology

We will invite a consultant archaeologist to prepare desk-based research and identify areas where we could learn more from on-site digs. We are particularly keen on Crickheath Wharf for further investigation because we will be reconstructing the winding hole in the delivery phase. Other wharf sites or possibly lime kilns may tie in to this piece of work. We hope to use this activity as a means of promoting the project and interesting new people in the canal.

#### Package of Repairs for Heritage Structures

We intend working up construction packages/specifications for both volunteer works (principally vegetation removal and repointing) and contractor works (principally temporary works erection, parapet reconstruction and grouting) for a number of D grade assets between Llanymynech and Ardleen (ie they have been identified as in poor condition). The surveys have been updated by a volunteer engineer during 2012, and most repair works can be specified and identified on simple plans and elevations of the structures. There will be a small number of engineering solutions required for more significant repairs. There are some C grade (fair condition) assets on the same length which will be included, in an appropriate way, as budgets allow, maximising the work parties time in the area. This details will be progressed by our Waterway Engineer.

#### Access and boundary audit (volunteer activity)

There will also be an intention to set up volunteer work groups to survey the access and boundary treatments along the whole canal. There are stretches of towpath which have been upgraded very recently and access

has been addressed over the years, but we intend involving volunteers in auditing the boundary types, their condition, ownership (where possible) and specific things like major trees, access points and relationship to canal features. It is important we assess the repairs needed, particularly where damage will continue (including where cattle poach the waters edge due to fences being absent). We will devise a method and recruit volunteers, most of this work we will do in-house.

#### Additional information for CMP

The research and costings mentioned above will help us with an addendum to our Conservation Management Strategy as written in 2005 and signed up to by all partners. We will address any further gaps between the CMS and the requirements for a CMP. This will be tendered to a consultant / consultants and will be delivered in consultation with the Montgomery Canal Partnership.

#### Arts Residency

We will work with Arts Council of Wales on an arts residency on the Welsh length of the canal. The aim being to devise innovative and interesting ways of communicating the conservation of the canal to visitors. This residency will then feed in to aspects of the Activity Plan or our conservation work, providing an element of contemporary art in parts of our work, to interest and engage new audiences.

#### Activity Plan

We will commission a consultant (who may break it down into smaller packages) to write an Activity Plan. Initial discussions have been had with the local interest groups, youth club representatives etc to look at types of projects and activities which will attract new audiences, the consultant will be asked to build on this. There will be a special requirement to look at ways to use the Welsh language as this project will have activities in Powys. We will expect the consultant to review the current interpretative information on the canal and propose appropriate additions to help more people learn about the heritage and increase the breadth of knowledge for those who already understand. Downloadable trails, leaflets, guided walks or "safaris", on-site information panels will be combined in a complementary package to the existing provision of information and learning resources. We will endeavour to make these work alongside other trails and media from organisations outside our own. We will require a detailed volunteer plan and training plan, which the consultant will write in cooperation with staff and one or two knowledgeable volunteers. The Activity Plan will include budgets for the activities we wish to include in the project.

#### Business Plan

The Project Manager and Waterway staff will produce a business plan which will describe the project costs and risks, and consider the economic impact of the project actions on future management and how this will be budgeted for.

Job descriptions will be written for the two new posts (18 months Countryside Management Project Officer plus possibly an apprentice) for the delivery phase and how they fit within a project management structure, briefs will be finalised, programmes elaborated, costs firmed up and the final application documents completed. Much of this will be completed by the Project Manager.

#### **5b Who are the main people responsible for the work during the development phase of your project?**

This project is intended to be the first major restoration project of the Canal & River Trust. This project would be ideal in setting the tone of the Trust's approach to restoration by progressing social and environmental objectives together with the desire to see the network expanded.

British Waterways formally transferred its assets and responsibilities to Canal & River Trust in July 2012. All BW staff transferred to the Trust and employees of The Waterways Trust also joined the Trust. The Enterprise team was no exception, taking with it all the expertise and experience of the staff. Julie Sharman, Head of Enterprise, is supported by National Programmes colleagues and Enterprise Managers (including Nicola Lewis-Smith, who was involved in the previous Montgomery Canal project – HG-05-00469). The Trust, works across teams for complex project delivery, eg Environment and Heritage Teams working closely with project managers and Enterprise. The team has wide ranging experience of other projects, including the recent award winning Droitwich Canal Restoration and the on-going Lune Aqueduct scheme. For major project applications and delivery the Trust has dedicated project staff, who will liaise with all the partnership members, working on both sides of the English/Welsh border. The Conservation Management Strategy, written in 2005 and signed up to by all partners, guides the partnership and the Development Manager, reducing the need to seek buy-in at strategic level, therefore reducing some of the complexities of this

cross-border project.

At a local level, the Trust is guided by Waterway Partnerships, made up of business and third sector individuals who help to steer the way each Waterway evolves and meets new challenges. In terms of resources (financial and staff) the Trust continues with no fundamental change from British Waterways; Government has committed to a 15 year contract for England and Wales, at a funding level which is secure and can be carefully managed through programmes and prioritisation. There has been slight shifts in focus, to be more open to our communities and visitors, including building our team of volunteer coordinators and education volunteers. Our outward appearance will continue to change and we are confident that local communities will want to be involved more than ever before, which supports our aspirations for projects and their legacies into the future.

Project Manager (project post) see job description on the Development Phase Plan

Community Development Officer (project post) see job description on the Development Phase Plan

#### Enterprise Manager

Julie Sharman, Head of Enterprise (Enterprise team will be responsible for reporting and liaison with funders) Julie has worked for British Waterways for 14 years as a senior manager responsible for all aspects of waterway regeneration, general management and development.

Over the last 13 years Julie has led an area based team in the general and operational management of waterways in Cheshire and Wales, this included dealing with all aspects of the business including the key political relationships with the Welsh Assembly Government. Her new role as Head of Enterprise brings with it new challenges which build on her leadership skills. Enterprise is the key area for securing the engagement of a wider partnership working for the development of our waterways. Waterways are valued by their local communities and Julie will develop strong links with local authorities, government organisations and sub-regional partnerships over the whole of the Wales and England to secure the enhancement and improvement of the waterway network.

Julie studied Civil Engineering at Manchester University and spent her early career in construction, project management and delivery. She previously worked on the Channel Tunnel Project and the Jubilee Line Extension. Julie is a Chartered Civil Engineer.

#### Volunteer Coordinator

Paul Corner joined Canal & River Trust in June 2012, through the national recruitment of Volunteer Coordinators to local Waterways. The purpose of the appointments is to work better with established volunteer groups on our waterways, make new links with related voluntary organisations and to look at directly recruiting our own volunteers. Paul works alongside a Volunteer Team leader who was appointed in September 2012. Paul is an Ecologist by training and has had other volunteer manager roles outside Canal & River Trust.

#### Education and Interpretation Manager

Annette Simpson has over fifteen years' experience of planning and implementing education, community and interpretation projects within historic environments.

She has worked for Canal & River Trust (and British Waterways) for nearly 22 years. She trained as an industrial archaeologist and then in heritage management, but has always worked as a heritage or countryside interpreter.

Annette currently works within the community engagement team as education & interpretation manager, overseeing all of the Trust's learning activities (including the new Canal & River Explorers programme), managing the Trust's education coordinators and a growing team of very enthusiastic education volunteers.

#### Principal Engineer, Head of Technical Solutions.

Les Clarke is Principal Engineering within Technical Solutions, a group who deal with finding and understanding the causes of problems, investigations, feasibility studies, risk studies, concept designs, full designs, specifications, assistance during construction. Professional disciplines covered include most aspects of civil & structural engineering, geotechnical engineering, ground investigations. The team operates nationally across Canal & River Trust.

Les has worked for BW/CRT since 1984. He has experience of all types of CRT infrastructure across design, construction & site works, heritage work, contract documentation, contract management, project management. Les has also managed national framework contracts with our contractor partners.

Les is a fellow of the Institution of Civil Engineers, Chartered Civil Engineer. FICE, C.Eng.

#### Waterway Engineer

Joe Murphy is the Principal Waterway Engineer for North Wales and Borders. Heading up the local waterway Engineering team which involves the day to day line management three Waterway Engineers and four Length Inspectors. Responsible for all aspects of asset management in the local waterway. The role is varied and deals with a broad spectrum of responsibilities including all aspects of asset management and the supply of engineering support to the operations teams on a daily basis. There is also a strong emphasis on the balance between engineering, heritage and environmental matters.

Joe has been with BW/CRT since 1998 and has filled various roles including Project Engineer, Waterway Engineer, Asset and Programming Manager and Contracts Manager. Prior to joining the waterways his background was working for several large civil engineering consultancies such as Mott McDonald and Brown and Root on schemes such as the channel tunnel, M25 reconstruction and M65 dealing predominantly with large highways bridges.

#### Heritage Advisor

Kate Lynch qualified as a chartered landscape architect in 1996 after graduating from Manchester Metropolitan University with a degree and postgraduate diploma in Landscape Architecture. She joined BW/CRT in 2001 to co-ordinate a regeneration strategy, part funded by English Heritage, for the Leeds & Liverpool Canal. Kate worked for 3 years as a Landscape Architect for the Canal & River Trust in the Wales & Borders area. In 2007, following a company restructure, she was appointed as a Heritage Advisor. Kate has completed a postgraduate diploma course in Historic Environment Conservation at Birmingham University via the Ironbridge Institute in 2012.

Prior to commencing work with the Canal & River Trust, Kate worked for 8 years initially as a landscape architect and then a Project Manager with Central Scotland Forest Trust. Work involved project management of Falkirk Council's millennium access project to promote public access to the Antonine Wall, a Scheduled Ancient Monument, community woodland design and developing a grant funded environmental improvement initiative.

#### Ecologist

Stuart Moodie has worked for BW/CRT since 1998. Before that he had worked for the NRA and Environment Agency in Somerset and for the NCC in Cornwall and Somerset. Initially he worked for the British Waterways central environment team providing advice to canal managers throughout the country on all aspects of wildlife conservation management within British Waterways' estate. In 2000 he moved to the North Wales and Border Counties waterway, as the dedicated ecologist for that area. He had responsibility for all aspects of environmental management and advice for that area which included the Montgomery Canal SSSI/SAC. Currently he works within an environment team and covers the Montgomery, Llangollen, Shropshire Union Canals and the Weaver Navigation. The team provides advice on biodiversity issues and ensures compliance with environmental regulations. The Montgomery Canal is the most significant canal wildlife site within this area. Stuart provides expert ecological input to the Montgomery Canal Partnership and Chairs the Environment Sub-group. He ensures that all works within the protected site are appropriately licensed and that works are sympathetic to the wildlife of the site and where possible enhances it. He is responsible for the management of the canal nature reserves and co-ordinates contractor and volunteer input to this works. He co-ordinates ecological monitoring of the site and undertakes and commissions ecological surveys. He also provides ecological input to restoration and enhancement projects. He also represents Canal & River Trust on a variety of local and regional groups concerned with biodiversity.

There is a wealth of knowledge within the Montgomery Waterway Restoration Trust, SUCS and Waterway Recovery Group, which will continue to be valuable to the project, canal restoration and maintenance.

**5c Complete a detailed timetable for the development phase of your project. Use the 'add item' button to enter additional rows.**

<b>Development activities</b>					
<b>Task</b>	<b>Start month</b>	<b>Start year</b>	<b>End month</b>	<b>End year</b>	<b>Who will lead this task</b>
Activity Plan	April	2014	September	2014	Community Development Officer
Conservation Plan	April	2014	August	2014	Project Manager
Management and Maintenance Plan	April	2014	August	2014	Project Manager
Project Business Plan	April	2014	September	2014	Project Manager
Ecological study	October	2013	June	2014	Ecologist
Topographic survey of proposed reserve site	April	2014	April	2014	Project Manager
Arts Residency on nature conservation and education	April	2014	September	2014	Head of Education and Interpretation
Community Archaeology	May	2014	July	2014	Community Development Manager
Access and Boundary Audit	May	2014	May	2014	Project Manager
Appointment of Project Manager	January	2014	December	2014	Enterprise Manager
Appointment of Community Development Officer	January	2014	December	2014	Enterprise Manager
Brief for Ecological study finalised and tender activity	October	2013	October	2013	Ecologist
All other consultant briefs finalised and tender activity	February	2014	March	2014	Project Manager
Final project approved internally incl risks	October	2014	November	2014	Project Manager
Submission of Round 2 bid	November	2014	December	2014	Project Manager

**5d Tell us about the risks to the development phase of your project and how they will be managed. Use the 'add item' button to enter additional rows.**

### **Development risks**

<b>Risk</b>	<b>Likelihood</b>	<b>Impact</b>	<b>Mitigation</b>	<b>Who will lead this</b>
Failure to secure Round 1 pass	Medium	High	Ask HLF questions as necessary and be meticulous about answering application questions	Project Manager
Not all match funding is secured	Low	Medium	Have a funding strategy in place and be clear about how final funding can be secured at the beginning of the delivery phase	Project Manager
Planning consent for nature reserves is not granted	Low	Medium	Pre application advice to be sought from Planners and consider design and maintenance of previous phase when designing new reserve	Project Manager
Licences for environmental works not granted	Low	Medium	Ecologist to talk through with regulatory body before submitting for licences	Ecologist
Partnership divides over way forward	Low	High	Regular partnership meetings and communications between if issues occur	Enterprise Manager
Surveys reveal environmental or heritage issues which add costs to project	Medium	Medium	Surveys to be organised at the early stage of development phase and reasonable contingency sum to be allowed for until surveys and their implications better known	Project Manager
Consultants fail to fully meet the brief or provide information late	Low	Medium	Allow time for reviewing draft briefs and make them as prescriptive as needed. Advertise opportunity in best way to attract good consultants and monitor work regularly	Project Manager

**Delivery phase****5e Who are the main people responsible for the work during the delivery phase of your project?**

The Project Manager and Community Development Officer will be offered an extension to their contracts for the delivery phase. We intend having one or two dedicated staff to deliver some of the environmental enhancements. This idea will be worked up in more detail during the development phase, the likely staffing will be a Countryside Management Project Officer and an apprentice (minimum 18 month appointment). The dedicated project staff will continue to receive support from the Canal & River Trust permanent staff and particularly from Enterprise. The Montgomery Canal Partnership will be a steering group and will help manage risk and offer advice as the project develops. The North Wales and Borders Waterway Partnership may also guide the project and will help promote it at regional level. The volunteer canal restoration groups will give their practical advice to our designs and vice versa regarding construction techniques. There will be a major addition to the project team in the form of the Construction Manager who will lead on framework contractor involvement and procurement.

**5f Complete a summary timetable for the delivery phase of your project. Use the 'add item' button to enter additional rows.****Delivery activities**

<b>Task</b>	<b>Start month</b>	<b>Start year</b>	<b>End month</b>	<b>End year</b>	<b>Who will lead this task</b>
Briefs for delivery phase finalised	May	2015	June	2015	Project Manager
Appointment of consultants	July	2015	July	2015	Project Manager
Detailed design proposals and specifications	August	2015	October	2015	Project Manager
Construction tender packages complete	October	2015	November	2015	Project Manager
Tender action and contractors appointed	November	2015	January	2016	Project Manager
Appointment of Countryside Officer / apprentice	September	2016	March	2018	Project Manager
Towpath works on site phase 1	January	2016	March	2016	Project Manager
Towpath works on site phase 2	January	2017	March	2017	Project Manager
Habitat works on site main de-silting phase	January	2016	March	2016	Project Manager
Channel restoration on site	February	2016	March	2018	Project Manager
New nature reserve ground work only	March	2016	July	2016	Project Manager
New nature reserve phase 2 lining, landscape and visitor infrastructure	July	2017	December	2017	Project Manager
Programme of activities and events	July	2015	September	2018	Community Development Officer
Festival 1	October	2017	October	2017	Community Development Officer
Festival 2	October	2018	October	2018	Community Development Officer
Habitat enhancements on site (not main de-silting)	September	2016	March	2018	Countryside Officer
Final report and plans for groups and events to continue after project	October	2018	November	2018	Project Manager

**5g Tell us about the risks to the delivery phase of your project and how they will be managed. Use the 'add item' button to enter additional rows.**





## **6a How will you maintain the outcomes of your project after the grant ends and meet any additional running costs?**

Volunteers will be key to maintaining the canal, building on existing interest and support. Canal adoption schemes have been launched recently across Canal & River Trust, to encourage businesses and local people to take part in maintaining their canals. The Montgomery Canal will be a good waterway for this type of involvement due to the wide range of localities and variety of assets which can be cared for. Events and education volunteers will be recruited during the project with a view to their activities continuing with the support of Canal & River Trust's Education Volunteer Coordinator for the North. Existing groups, such as the Friends of the Montgomery Canal and the Shropshire Union Canal Society are passionate about the Montgomery Canal and will continue to be active supporters, through restoration projects, events and promotion. Through this project we aim to increase membership or active members within the existing membership and work more closely with the Canal & River Trust to focus energies in the right ways. It may be possible to continue to fund a Community Development Officer after the project, but even if this is not the case there are two waterway staff who can continue to support volunteer activities in the canal. The Canal & River Trust will continue in the same vein as British Waterways, in as much as the safety and state of repair of the canal will be monitored and works will continue to be planned on a priority basis. As stated in the CMS, monitoring informs the way we do things in the future. The condition of the SSSI and SAC will also be monitored and maintained and the new nature reserves will be an important part of that monitoring, at some point the reserves will be included within the appropriate designations. We will determine some key performance indicators against which to gauge the success of the new habitats, and will maintain and adjust Management Plans to ensure we improve the biodiversity of the reserves.

Once the new reserves are fully established we will be able to lift the threshold on the maximum boat numbers, which will therefore generate more income. We hope this will attract more business to the local area, on and off the canal, and with it there will be further potential for us to generate income through moorings and marinas (one marina over 80 berths is planned at Queen's Head by a leisure company).

The restoration of the Montgomery Canal is a long-term project, with huge support from all the organisations within the Montgomery Canal Partnership. The partnership members will provide funding, expertise and time to the restoration into the future. We will also look to Social Enterprise groups to assist, and there is the potential for training to continue in some aspects of management. Despite major cuts in funding to public bodies and local authorities and the added pressures on charities to find regular support and funding for campaigns, there will remain a commitment to the continued restoration. We will continue to think imaginatively about the way we can bring projects forward and with support from organisations like the Heritage Lottery Fund we should be able to find match-funding at the sort of levels currently required. Local Authorities will also be able to support the canal restoration through maintaining the importance of benefits to the local communities through policies and strategies.

We believe additional running costs will be relatively low, as the infrastructure has to be maintained now, in its current state, for public access and safety and for water control purposes. We have an estimate of £800/yr/hectare for maintaining nature reserves (mainly volunteer management costs) and this rate is unlikely to increase because we have learnt lessons about the design of reserves and hope to minimise maintenance costs as a result.

Early indications are that the Canal & River Trust is better placed to tap into public support for the canals and to make use of financial benefits associated with being a charity. Canals are a great asset to the nation and this is widely understood.

Communication is often the thing that suffers when project staff leave an organisation. Canal & River Trust has recently started using ThankQ software which makes it much easier to record supporters information and communication with those individuals and groups. It is also straightforward to send newsletters or event information to groups of supporters, according to location or specific interest. This tool will move us from strength to strength and will helpfully be fully adopted during the life of the project.

## **6b Tell us about the main risks facing the project after it has been completed and how they will be managed.**

<b>After project risks</b>				
<b>Risk</b>	<b>Likelihood</b>	<b>Impact</b>	<b>Mitigation</b>	<b>Risk Owner</b>
Maintenance budget is reduced based on what we deem necessary after completion	Low	Medium	Project will devise a management regime which achieves a balance between volunteers and staff. Construction details will aim to achieve low maintenance solutions	Waterway Engineer
Volunteer interest wanes after project	Medium	Medium	Volunteer coordinator will be tasked with supporting volunteers and communications will be maintained with the volunteers as well as regular recognition of volunteer commitment	Volunteer Coordinator
Aston Nature Reserves fail to establish to regulatory bodies satisfaction so boat numbers cannot be increased	Low	Medium	Ecologist to monitor reserves and liaise with partnership. It may take more than 3 years for the reserves to establish. Volunteers to assist with reserve management and if necessary specialist contractors be employed to achieve results	Ecologist
Water resource issues	Low	Medium	Boat numbers may need to be capped and water management may need to be adjusted. Nature reserves will be designed to have various depths so wetlands can cope with dry seasons	Waterway Engineer
Montgomery Canal Partnership divides over way forward	Low	High	Good communications to be maintained via partnership meetings and between meetings if required	Enterprise Manager

**6c How will you evaluate the success of your project from the beginning and share the learning?**

We will closely follow the guidance provided by HLF in evaluating projects and appreciate that it is qualitative information which will be most valuable to us and managers of other sites and projects. The project outcomes set out in this application will be reported on and a combination of narrating our project journey and providing quantitative information will give a whole picture of our success.

The CMS guides us for monitoring project outputs, especially the natural environment, including populations of floating water plantain and grasswack pondweed, water quality and range of other aquatic plant species (desirable and undesirable). There is reference to national and local government sustainability indicators, and Powys are in the process of reviewing their sustainability appraisal through the LDP consultation. We would look to identify a number of indicators to use to assess the difference our project is making. The list we will draw our indicators from (the CMS) is:

**WILDLIFE**

Length of SSSI in favourable condition  
 Mapped area of *Luronium natans*  
 Transect occurrence of seven nationally rare aquatic water plants  
 % banksides with marginal vegetation  
 Water quality: criteria to be defined

**BUILT HERITAGE**

Listed buildings or structures restored / removed from Buildings at Risk Register  
 Listed buildings or structures brought back into use  
 Non-listed heritage structures on BW heritage register restored  
 Non-listed heritage structures on BW heritage register brought back into use  
 Heritage training days for  
 i. Trust staff  
 ii. External contract staff  
 iii. Volunteers

**VISITOR USE**

Towpath users (also health): existing pedestrian counters  
 Boat numbers: existing boat counters  
 Canoeists (also health): method to be defined, (club questionnaire?)  
 Cyclists (also health): method to be defined  
 Length of towpath where cycling is permitted

**EDUCATION**

CRT-organised visits – numbers of beneficiaries  
 Visitor numbers to Burgedin Canoe Centre  
 Visitor numbers to reserves: additional pedestrian counters?  
 Number of other known visiting/user groups  
 Number of talks or visits to groups  
 Numbers of information and interpretation boards or web-based equivalents

**SOCIAL INCLUSION/COMMUNITY INVOLVEMENT**

Numbers of community or voluntary groups active on canal  
 MC News circulation  
 Number of volunteer days input to the canal restoration and management  
 Length of towpath with all ability access  
 Number of stiles either replaced by kissing gates or removed  
 By local survey:  
 % believing canal belongs to the local community  
 % believing they know what is going on along the waterway  
 Method of travel to canal (foot, bicycle, car, bus etc)

**ECONOMIC DEVELOPMENT**

Jobs/employment: method to be defined  
 Proportion of project expenditure going to local firms

Proportion of suppliers with environmental management system

CRT suppliers

Subcontractors to Canal & River Trust suppliers

Other partners' suppliers

(We are also keen to use the LM3 local multiplier to see how the local economy benefits from the spend as a result of the project. The CMS aspires to offer local firms the chance to bid to supply contracts, with the hope that money stays in the local economy through payment of salaries and purchase of materials).

#### COMMUNITY IDENTIFIED TARGETS

These targets will need to be measured by regular survey of the community by a standard methodology.

Method and frequency to be defined.

Dog fouling

Perception of birds

Length open to navigation

Landscape values – trees & hedges

Attractiveness/cleanliness

Peace and tranquillity

The Friends of the Montgomery Canal are already active in raising awareness and sharing best practice and in the CMS they commit to widening their remit to include monitoring and surveying, and being a channel and forum for local views. Shropshire Union Canal Society has recently carried out towpath questionnaires based on the Sustrans questionnaire, which will also be regularly repeated on Route 81 (currently on the southern third of the Montgomery Canal)

We intend holding a best practice conference to share our experience and launch our best practice manual for managing canals (for L natans). It will be aimed at landowners and statutory bodies who have L natans populations or are owners of land that maybe once could have been a natural habitat for the species.

We will share best practice across a range of topics within our own organisation and through partner organisations, including members of the Montgomery Canal Partnership. We intend having a regularly updated project website for internal use and with accessible areas for partners and interested individuals.

## Section Seven - Project Costs

**In this section, tell us how much it will cost to develop and deliver your project.**

### 7a Development-Phase costs

#### Development costs

Cost heading	Description	Cost	VAT	Total
Professional Fees	All fees associated with development phase	107000		107000
New staff costs	Project Manager and Community Development Officer	55500		55500
Recruitment				
Other	Surveys, planning fees and volunteer expenses	8670		8670
Full Cost Recovery				
Contingency	10% on all costs but not including salaries	11567		11567
Non-cash contributions	Trust support and attendance of organisations at partnership meetings	4100		4100
Volunteer time	Surveys, community archaeology, design and project planning	7950		7950
Total		194787		194787

### 7b Development-Phase income

<b>Development income</b>			
<b>Source of funding</b>	<b>Description</b>	<b>Secured?</b>	<b>Value</b>
Local authority			
Other public sector	Arts Council of Wales contribution for arts residency	Yes	12000
Central government			
European Union			
Private donation - Individual			
Private donation - Trusts/Charities/Foundations	Canal groups within partnership giving cash contribution	Yes	500
Private donation - corporate			
Commercial/business			
Own reserves	Canal & River Trust Project Budget	Yes	10037
Other fundraising			
Non cash contributions	Trust staff and organisations attendance at partnership meetings	Yes	4100
Volunteer time	Surveys, community archaeology, design and project planning	No	7950
HLF grant request			160200
Total			194787

### 7c Development phase financial summary

Total development costs	194787
Total development income	34587
HLF development grant request	160200
HLF development grant %	82

## Section Seven - Project Costs

### 7d Delivery-phase capital costs

<b>Cost Heading</b>	<b>Description</b>	<b>Cost</b>	<b>VAT</b>	<b>Total</b>
Purchase price of items or property	Garden wall purchase because it forms edge of canal	5000		5000
Repair and conservation work	Habitat enhancements, canal heritage structure repairs, towpath repairs, channel restoration and boundary repairs	1402000		1402000
New building work				
Other capital work	New nature reserves and associated access and infrastructure	1596000		1596000
Equipment and materials	Materials and equipment relating to reserves, channel, towpath, boundary, heritage structures and habitat works	930000		930000
Other				
Professional fees relating to any of the above	Professional fees associated with habitat works, new reserves, access improvements, channel repairs	343000		343000
Total		4276000		4276000

## Section Seven - Project Costs

### 7e Delivery-phase activity costs

<b>Cost Heading</b>	<b>Description</b>	<b>Cost</b>	<b>VAT</b>	<b>Total</b>
New staff costs	Project Manager, Community Development Officer and 18 month Countryside Manager	248000		248000
Training for staff				
Paid training placements	Apprentice to Countryside Manager	20000		20000
Training for volunteers	Materials and delivery of volunteer training across all tasks	98000		98000
Travel for staff				
Travel and expenses for volunteers	Travel including provision of transport for remote sites plus volunteer expenses	75000		75000
Equipment and materials	Equipment and materials associated with events and activity plan projects	40000		40000
Other	An allowance for services, hire and infrastructure for events and activities	100000		100000
Professional fees relating to any of the above	Fees related to all event and activity plan activities where a professional is appointed	73000		73000
<b>Total</b>		<b>654000</b>		<b>654000</b>

### **7f Delivery-phase - other costs**

<b>Cost Heading</b>	<b>Description</b>	<b>Cost</b>	<b>VAT</b>	<b>Total</b>
Recruitment	Recruitment of volunteers or staff	1000		1000
Publicity and promotion	Promotion of events and volunteer opportunities	10000		10000
Evaluation	Evaluation of project outputs and outcomes	25000		25000
Other				
Full Cost Recovery				
Contingency	Contingency at 15% against all costs except staff costs	700000		700000
Inflation				
Increased management and maintenance costs (maximum five years)				
Non cash contributions	Montgomery Canal Partnership representatives involvement	12600		12600
Volunteer time	Volunteer in-kind across restoration, environmental enhancements heritage repairs and events	273700		273700
<b>Total</b>		<b>1022300</b>		<b>1022300</b>

## **Section Seven - Project Costs**

### **7g Delivery-Phase income**

Source of funding	Description	Secured?	Value
Local authority	Powys County Council and Shropshire Council	No	600000
Other public sector	Contributions from Montgomery Canal Partnership Organisations	No	156000
Central government			
European Union	Funds being applied for from Life+ Nature	No	460000
Private donation - Individual			
Private donation - Trusts/Charities/Foundations	Contributions from all canal societies Shropshire Union Canal Society, Montgomery Waterways Restoration Trust, Friends of Montgomery Canal and Inland Waterways Association	Yes	74000
Private donation - corporate	Canal & River Trust commitment to fundraise (Sponsorship)	No	250000
Commercial/business			
Own reserves	Canal & River Trust own reserves	Yes	276000
Other fundraising	Canal & River Trust fundraising (Trusts etc)	No	100000
Increased management and maintenance Costs (maximum five years)			
Non cash contributions	Montgomery Canal Partnership representatives involvement	No	12600
Volunteer time	Volunteer in-kind across restoration, environmental enhancements, heritage repairs, channel restoration and events	No	273700
HLF grant request			3750000
Total			5952300

### 7h Delivery-phase financial summary

Total delivery costs	5952300
Total delivery income	2202300
HLF delivery grant request	3750000
HLF delivery grant %	63

**7i If cash contributions from other sources are not yet secured, how do you expect to secure these and by when?**

The Local Authority contributions are made up of up to £600,000 from Powys County Council and there is a commitment to secure this funding through their green travel commitments (see letter of support). Also Shropshire Council are unable to approve any cash commitment now, but should a Round 1 pass be awarded they are committed to sourcing a contribution, but they are unable to give a figure at this stage. (see letter of support)

Life+ will be applied for in June 2013 and we will hear if it is successful in March 2014. We have already put this project forward for funding in 2012 and it was rejected, but feedback has been given and we are more confident of success this year.

The Partnership members (ie who are not Local Authority or canal groups) are generally in the process of reorganisation or budget cuts, so are not in a position to commit funds at this stage, but we are hopeful between the environment and heritage bodies we should be able to secure this relatively small sum (£156,000).

Finally Canal & River Trust fundraising team is committed to making fundraising for the Montgomery Canal a priority. We are aiming to secure £100,000 worth of trust funding and also £250,000 of sponsorship. We are in discussions with a leisure group who are keen to develop a marina and they acknowledge the importance of the canal restoration to their marina, once they decide to go ahead with the development, they will be likely to give the majority of this figure as a contribution to the project.

**7j If you have included Full Cost Recovery, how have you worked out the share that relates to your project?**

N/A

**Section Eight - Additional information and declaration**

**This part of the form aims to collect the information we need to report on the range of organisations we fund. We will not use this information to assess your application. We encourage you to be as specific as possible about the people your organisation represents.**

**If your organisation represents the interests of a particular group, such as young people or disabled people, tell us which by filling in the tables below.**

**If you are based in Northern Ireland, where legislation requires us to report in detail on the organisations we fund, please complete the tables in full, as applicable.**

✓ If you are based outside Northern Ireland and your organisation represents the interests of a wide range of people and not any particular group, mark this box only.



## **Declaration**

### **a) Terms of Grant**

You must read the standard terms of grant for this programme on our website.

By completing this Declaration, you are confirming that your organisation accepts these terms. For partnership projects, all partners must confirm that they accept the standard terms of grant by adding a contact at the end of the declaration.

### **b) Freedom of Information and Data Protection**

We are committed to being as open as possible. This includes being clear about how we assess and make decisions on our grants and how we will use your application form and other documents you give us. As a public organisation we have to follow the Data Protection Act 1998 and the Freedom of Information Act 2000.

When you complete the Declaration at the end of the application form, you are confirming that you understand the Heritage Lottery Fund's legal responsibilities under the Data Protection Act 1998 and the Freedom of Information Act 2000 and have no objection to us releasing sections 2, 3 and 4 of the application form to anyone who asks to see them. If there is any information in these sections of the form that you don't want made publicly available, please explain your reasons below:

We will take these into account when we respond to any request for access to those sections. We may also be asked to release other information contained elsewhere in the form and we will respond to these requests after taking account of your rights and expectations under the Freedom of Information Act 2000 and Data Protection Act 1998. In those cases, we will always consult you first.

The Heritage Lottery Fund will not be responsible for any loss or damage you suffer as a result of HLF meeting these responsibilities.

When you complete the Declaration you also agree that we will use this application form and the other information you give us, including any personal information covered by the Data Protection Act 1998, for the following purposes:

- To decide whether to give you a grant.
- To provide copies to other individuals or organisations who are helping us to assess and monitor grants.
- To hold in a database and use for statistical purposes.
- If we offer you a grant, we will publish information about you relating to the activity we have funded, including the amount of the grant and the activity it was for. This information may appear in our press releases, in our print and online publications, and in the publications or websites of relevant Government departments and any partner organisations who have funded the activity with us.
- If we offer you a grant, you will support our work to demonstrate the value of heritage by contributing (when asked) to publicity activities during the period we provide funding for and participating in activities to share learning, for which we may put other grantees in contact with you.

We may contact you from time to time to keep you informed about the work of the Heritage Lottery Fund

Tick this box if you do not wish to be kept informed of our work

**I confirm that the organisation named on this application has given me the authority to complete this application on its behalf.**

**I confirm that the activity in the application falls within the purposes and legal powers of the organisation.**

**I confirm that the organisation has the power to accept and pay back the grant.**

**I confirm that if the organisation receives a grant, we will keep to the standard terms of grant, and any further terms or conditions as set out in the grant notification letter, or in any contract prepared specifically for the project.**

**I confirm that, as far as I know, the information in this application is true and correct.**

**I confirm that I agree with the**  **above statements.**

<b>Name</b>	Alex Ball
<b>Organisation</b>	Canal & River Trust
<b>Position</b>	Development Manager
<b>Date</b>	11/06/2013

**Are you applying on behalf of a partnership?**  
No

## **Section Nine - Supporting Documents**

**Please provide all of the documents listed at each round, unless they are not applicable to your project. You will be asked to indicate how you are sending these documents to us - as hard copy or electronically.**

### **First round**

**1. Copy of your organisation's constitution (formal rules), unless you are a public organisation. If your application is on behalf of a partnership or consortium, please also provide the constitution of each of these organisations too.**

**If you have sent a copy of your constitution with a previous grant application (since April 2008) and no changes have been made to it, you do not need to send it again. Tell us the reference number of the previous application.**

Already supplied

**Please tell us the reference number of the previous application.**

HG 12 03726

**2. Copies of your agreements with project partners, signed by everyone involved, setting out how the project will be managed (if applicable);**

Not applicable

**3. Copy of your organisation's accounts for the last financial year. This does not apply to public organisations;**

Electronic

**4. Spreadsheet detailing the cost breakdown in Section seven: project costs;**

Electronic

**5. Calculation of Full Cost Recovery included in your development phases costs (if applicable);**

Not applicable

**6. Briefs for development work for internal and externally commissioned work;**

Electronic

**7. Job descriptions for new posts to be filled during the development phase;**

Electronic

**8. A small selection of images that help illustrate your project. If your project involves physical heritage, please provide a selection of photographs, a location map and, if applicable, a simple site map or plan. It would be helpful if these are in digital format (either as an attachment or on disk). We will use these images to present your project to decision-makers.**

Electronic

**If applicable, please attach any additional documents as required for the programme that you are applying under. For further guidance, please refer to Section 9 of the application guidance**

Not applicable

**Please now attach any supporting documents.**

**When you have completed the form click the submit button to submit the form to the server. You can view what you have entered by clicking the draft print button above.**