

FINDINGS ON A SURVEY OF THE WOODLAND TRUST SITE TRANSFER PROGRAMME IN WALES – CAN COMMUNITIES BECOME MORE ENGAGED?

**A Report by Llais y Goedwig
for Coed Cadw/The Woodland Trust Wales
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Dr Evelyn Over, with support from
Jane Vaughan Gronow & Rosie Strang



INTRODUCTION

The Woodland Trust (WT) in Wales has asked Llais y Goedwig (LlyG) to assess how the WT Site Transfer Programme is functioning and to advise the WT on enhancing opportunities for transfer of site responsibilities to Community Woodland Groups (CWGs), make connections with potentially interested groups and look at developing and supporting group to group mentoring. It also asked LlyG to find out if its members could help the WT to deliver several of its major site investments.

The Site Transfer Programme is part of a WT policy to encourage communities, organisations and individuals to take on the management of discrete WT woods through a lease agreement. The WT in Wales is keen to support community involvement in its woods and wishes to adopt a flexible approach in negotiating a lease agreement (J.Langford, pers. comm).

In January 2015, information for this survey was gathered by site visits, telephone conversations and email exchanges with organisations and CWGs who have taken over the management of WT sites using the Site Transfer Programme. In addition, questionnaires were sent out to LlyG members.

1. WOODLAND SITE TRANSFER PROGRAMME

Four woodland groups which use WT sites were contacted:-

- Coed y Pobl, Devils' Bridge (Woods on Your Doorstep site community group)
- Monk's Wood, Vale of Glamorgan (Sustainable Wick community group)
- Workhouse Coppice, Ironbridge (Severn Gorge Countryside Trust)
- Angus Wood, Blandford Forum (Blandford Environmental Trust Ltd.)

Full details of the interviews are found in Annexe 1.

Two groups (Severn Gorge Countryside Trust and Blandford Environmental Trust Ltd) were pleased with their lease agreement with the Woodland Trust – the lease was for a long period (50 years for SGCT and 25 years for BET) and the groups paid an annual peppercorn rent.

Sustainable Wick community group is at present negotiating a lease agreement with the WT. Before signing the lease, the group had to form a legal entity. They were advised by the Vale Centre for Voluntary Services on setting up a Company Limited by Guarantee as the WT did not provide this support. The group is also drawing up an Article of Association.

Coed y Pobl community group has a Memorandum of Understanding (MoU) with the WT and which was drawn ten years ago by a WT woodland officer. In addition there is a 10 year working management plan which was renewed in 2013. The MoU is not working well and there is a difficult relationship between the community group and the WT.

Findings on the Woodland Site Transfer Programme

1. At present, the Woodland Site Transfer Programme in Wales is very limited and only one CWG has an agreement with the WT and a second CWG is in the process of signing a lease agreement.
2. CWGs which want to manage a WT site need ongoing support on issues such as legal advice, setting up a formal constitution, communicating over lease agreements and how to set up a social enterprise. The WT need to have a number of knowledgeable and efficient staff who are well informed about community related questions and can direct groups to organisations who can help them through this process. The process for taking on a WT site needs to be clearly set out by the WT so that groups are aware of the issues and pitfalls involved before they start.
3. It is difficult for CWGs to access funding for annual operations such as public liability insurance, volunteer insurance and path maintenance. WT may need to support (directly or indirectly) "signpost" community woodland groups to access funding both for capital works and annual operations.
4. The relationship between Coed y Pobl community group and the local WT Woodland Officer has broken down and as a result the Memorandum of Understanding with the WT is not functioning well. The WT should consider bringing in an independent broker/negotiator (possibly from the LlyG membership) to resolve the issues as soon as possible so that the community group can continue to be actively involved in the wood's future management.

2. ENHANCING OPPORTUNITIES FOR THE TRANSFER OF SITE RESPONSIBILITY TO CWGs

The WT website displays all the accessible woods in the United Kingdom. For its own sites, the information includes the location of the site in relation to the nearest community, a grid reference, woodland size and the availability of nearby parking and waymarked access routes. There is also a ten year working management plan which has been written by local WT woodland officers. The WT operations manager in Wales has separated its own holdings in North, Mid and South Wales into three categories:-

- Lease Potentially Available
- Agreed Engagement Welcome
- Potential consent

This information has been amalgamated into a database (Annexe 2: WT sites – Woodland suitability for CWGs). On the first tab of the database, the category **Lease potentially available** has been further divided into four groups:-

- i. WT site which has an existing management agreement with a CWG
- ii. WT woods which have good access, have nearby car park, are close to a community & could be taken over by CWGs with support
- iii. WT woods with limited access, steep slopes, poor car parking facilities and have management issues eg rhododendron infestation – these sites may be less suitable for CWGs
- iv. WT woods which are in remote locations, very steep with limited access – these sites appear not to be suitable for CWGs

In addition, Annexe 2 shows the distance from WT sites in Wales to the nearest CWG.

Findings on opportunities for the transfer of site responsibility to CWGs

1. The WT website provides an excellent start for a new group who wants to find a wood close to its community. The website is well designed and has useful information such as parking facilities, trails through the wood and the type of woodland terrain.
2. In total, there are 23 WT sites throughout Wales which are considered to have good access, have nearby car park and are close to a community (Annexe 2, category ii). The WT could actively target communities close to these sites and encourage local involvement. Organisations including ¹ACTIF and ²Outdoor Learning Wales already use woods as a local resource for education and health and they could work alongside the WT to encourage community involvement.
3. There are existing LlyG groups which may be located close to these 23 WT sites (see Annexe 2) and could play an invaluable role by peer mentoring new CWGs which want to manage WT sites.

3. ASSESSMENT OF POTENTIAL COMMUNITY INVOLVEMENT OF LLAIS Y GOEDWIG MEMBERS ON WT SITES

An online questionnaire was sent out to LlyG members to find out if CWGs would consider taking on the management of a WT site and support new groups who were interested in managing a WT wood. The questionnaire was sent out in January 2015 and there were 18 CWG responses. The full questionnaire responses are shown in Annexe 3.

Question 1 - Has your CWG contacted the WT? If so, what was the purpose?

Seven CWGs contacted the WT to receive a tree pack, 4 CWGs to ask a question on a woodland issue at a show and 3 CWGs to find out if a WT site was located close to their group. The response from the WT was considered to be helpful or very helpful and there were no negative responses.

Questions 2 - In principle, would your community woodland group be interested in taking on the management of a WT site depending on the location and the agreement type

Eight CWGs said they would be interested in taking on the management of a WT site and a further 5 CWGs said they would be potentially interested. Five groups said they would not be interested in taking the management of another site because “as a self-contained site, there is no WT woodland close enough to manage”, “the CWG is too new”, “there isn’t a site in our locality”.

Question 3 - How far would your group be prepared to travel to manage a Woodland Trust site?

Seven CWGs said they would be prepared to travel less than 5 miles, 6 CWGs between 5-10 miles and 3 CWGs between 10-20 miles.

¹ACTIF WOODS WALES Project run by Coed Lleol, which is the Welsh branch of the Small Woods. It aims to improve health and well-being in people suffering from chronic health conditions, by facilitating the exploration of local woodlands. ²OUTDOOR LEARNING WALES National network that aims to increase the understanding, appreciation and sustainable use of Wales’s natural environment.

Question 4 - What support/incentives would your CWG want from the WT as part of a management agreement/lease?

The CWGs listed volunteer insurance cover (named by 9 CWGs), training in woodland management skills (9 CWGs), training opportunity to collect firewood (8 CWGs), support with funding raising and publicity (8 CWGs), opportunity to collect firewood (8 CWGs) and support with travel costs (6 CWGs) as useful incentives from the WT. Annual (6 CWGs) and quarterly (4 CWGs) site meetings with a WT woodland officer were also noted as incentives. Additional incentives included legal advice and guidance and not-forest product support eg teaching bee keeping and green crafts skills.

Question 5 - If your CWG were to manage a Woodland Trust site, what type of agreement¹ would be preferable?

Nine CWGs preferred a management agreement, which provides consent for specific management operations but the responsibility for the site remaining with the WT, who would write a management plan and supervise a work programme. Five CWGs preferred a lease, where the responsibility for the WT site passes to the CWG. There was no support for one off event permission and annual activity permit and licencing.

Question 6 - There is potential for CWGs to help the Woodland Trust manage one of their major sites eg Cefn Ila near Usk. Would your group be interested becoming involved with this type of activity?

This question had very limited support - 14 CWGs said they were not interested in helping the WT manage one of its major sites and the reasons given included "too far to travel" and "travel is an issue plus there needs to be some incentive, eg extraction of timber". Four community groups which said they would be potentially interested - one group said "We would consider being involved in 'one off' events/ projects".

Question 7 - There are a number of Woodland Trust sites in Wales which are close to villages and towns. What incentives do you think are needed to encourage local communities to become involved in the management of these woods on a self-sustaining basis?

Support mechanisms named by CWGs, which encourage local communities to become involved with managing a local wood, include a development officer to support the creation of CWGs who would join the LlyG network (named by 9 CWGs), payment for an individual, local group or organisation to run open days and special events over a limited period eg 12 months (7 CWGs), active support and encouragement from local woodland experts (7 CWGs) and active support and encouragement from CWGs (7 CWGs). There was very limited support for more WT publicity events (2 CWGs).

Question 8 - Would your CWG be interested in offering a peer mentoring service to a new community woodland group on a Woodland Trust site in your area?

Nine community woodland groups were keen to offer a peer mentoring service and a further five groups were potentially interested. Comments from CWGs included "We have over 10 years' experience of running a community woodland", "After 10 years we hope we know what we're doing" and "We have built up knowledge and have always committed to sharing this with others". Four CWGs said they were not interested in peer mentoring and the reasons given included "Not sufficient capacity within group at the moment" and "we are too new".

Question 9 - Would you like to book on a session with Woodland Trust staff at the LlyG Gathering on 27-28th March to discuss community woodland opportunities?

Eight CWGs are keen to meet the WT at the LlyG gathering to discuss community woodland opportunities.

Findings on the potential CWG involvement of LlyG members of WT sites

1. Thirteen CWGs are interested in taking on the management of WT sites and a further 5 CWGs are potentially interested. Most groups would prefer to travel 10 miles or less to manage a WT site.
2. CWGs named support with volunteer insurance, training in woodland management skills, opportunity to collect firewood, support with funding raising and publicity and support with travel costs as incentives to support a CWG to manage a WT site.
3. The majority of CWGs wanted to sign a management agreement with the WT rather than a lease agreement.
4. The majority of CWGs were not keen to help the WT to run of its major site investments.
5. Incentives named by CWGs, to encourage local communities to manage a WT wood, include using a Development officer to support the creation of CWGs, paying an individual or a local group to run open days and special events and support from woodland experts and CWGs.
6. The majority of CWGs are keen to be part of a peer mentoring service to support new CWGs.

¹**Types of Management Agreement: Leases** – Temporary transfer of "ownership" of the land to another party (tenant) for a specified period of time; **Licences** - Give a third party the right to carry out specified activities on land in return for some form of consideration eg nominal sum of money; **Contracts** eg management plan – drawn up agreement with no legal significance (WT types of woodland agreement)

4. RECOMMENDATIONS ON THE WOODLAND TRUST'S SITE TRANSFER PROGRAMME IN WALES AND FUTURE COMMUNITY WOODLAND ENGAGEMENT

This survey assessed how the WT Site Transfer Programme is working in Wales and looked at opportunities for the transfer of site responsibilities to CWGs.

The present situation with the Site Transfer Programme in Wales

In Wales, there is one existing management agreement with a CWG on a WT site. The present relationship between the CWG and WT is not working and it is recommended that an independent negotiator is brought in to find a way forward. A second CWG in South Wales is negotiating a lease with the WT.

Overall, the present Site Transfer Programme in Wales is very limited. However the WT is looking to encourage more CWG involvement on their sites. This report has found there are opportunities to support and promote increased community engagement in WT woods although there are several obstacles which the WT need to address.

Opportunities for future Community Woodland Engagement on WT sites in Wales

1. WT support for Community Woods in Wales

As a result of a national WT policy, the WT in Wales actively supported Community Woodland engagement in 2014 through funding project work¹ and providing LlyG with an Environment Wales officer who can spend 25% of his time on Community Woodland work. This funding has enabled LlyG to gather background information in order to draw up a bid for major funding for Community Woodlands. The WT in Wales is keen to continue this support for Community Woods.

2. Targeting WT sites for new community involvement

Twenty three WT woods in Wales with good access and close to communities have been identified (Annexe 2) and these could be targeted for future local community engagement. LlyG members suggested a number of incentives to encourage new CWGs including a Development officer working with LlyG to support the creation of CWGs, peer mentoring by existing CWGs and paying an individual, local group or organisation to run open days and special events in new Community Woodlands.

3. Co-ordinating advice and support

A Development officer based with LlyG could support CWGs who want to manage a WT site. At present, this role is partly undertaken by the present LlyG Network Co-ordinator amongst her many roles. However, the problem with a Development officer is that it is usually a short term post because of funding whereas CWGs want consistency of advice over a long time period.

Another way of supporting new CWGs is peer mentoring. Existing CWGs have built up a wealth of experience and this invaluable resource could be utilised as well as generating a small revenue for the group who are doing the peer mentoring. There is currently a modest LlyG grant to pay travel costs for new CWGs to visit an established CWG, which is paid for their time and this initiative could be extended. Green Valleys Community Incentive Company based in Brecon has supported the establishment of eight new community woodland groups in Wales and their expertise could also be utilised.

4. Developing woodland skills and training

CWGs are keen to develop and learn woodland² and non-forest product skills, eg woodland management, bee keeping. The WT needs to find ways to facilitate training and skills development as this will give CWGs confidence to manage a WT site. WT assistance with supporting skills and training could also reduce the reliance of CWGs on the limited resources of WT staff.

¹ **LlyG project** work funded by the Woodland Trust included organising five regional events with CWGs and writing a report, supporting a stand at the Royal Welsh & preparing a future bid for Community Woodland funding

² **Woodland management skills** – One CWG used the expertise of a retired professional forester who is a member of the Royal Forestry Society. This is an excellent initiative for informal mentoring and could be extended – retired foresters are knowledgeable and generally are keen to help individuals and groups with forestry skills such as measuring and marking. There are organisations such as the Continuous Cover Forestry Group (CCFG) which could run training days for CWGs www.ccfg.org.uk Focus on Forestry First runs training courses and workshops funded by Welsh Government www.focusonforestryfirst.co.uk. Under the new Rural Development Plan, Farming Connect will pay towards the costs of woodland advisors to provide advice on woodland management.

Obstacles which need to be addressed by the WT in order to promote future community engagement

1. The role of WT staff in Wales

The role of WT staff is important for supporting CWGs on WT sites in Wales although the WT have indicated that they have limited staff resources (J.Langford, per.comm). Consequently, the WT need to find alternative ways to support CWGs eg a new Development Officer and/or existing CWG peer mentoring. It is important that WT staff in Wales and at the Head Office are well informed about CWG issues so that they can signpost the CWGs effectively to the correct information eg finding sources of funding for CWGs, legal advice.

2. Lease agreement

The WT would prefer a CWG to sign a lease agreement on a WT site rather than a management agreement because of limited WT staff resources (J.Langford, pers. comm.). A lease means that a CWG has full management control of a wood whereas a management agreement means that the WT still manages the wood with community involvement. The majority of CWGs in the LlyG questionnaire said they would prefer a management agreement to a lease agreement. The WT therefore needs to spend time and resources to explain to CWGs why a lease is preferable for the WT. These WT resources could include CWG case studies of lease agreements on WT sites and leaflets and online information on lease agreements. WT staff, who deal with lease agreements for CWGs, need to be aware that most group members are volunteers and may need to spend time with a group eg attend a CWG meeting to ensure a lease agreement is going to work successfully.

The WT require CWGs to become a legal entity eg Company Limited by Guarantee before a lease on a wood can be signed. As a result, the WT also needs to help CWGs to find organisations which are experienced in this type of work eg Vale Centre for Voluntary Services was used by Sustainable Wick community.

4. Social Enterprise

A CWG which signed a Memorandum of Understanding with the WT said they could not run a social enterprise as part of their agreement. However, this is likely to be different with a WT lease agreement and if the social enterprise this does not affect other woodland users, the WT should accommodate CWGs to form a social enterprise so that the group can be encouraged to generate a small revenue to pay for funding of annual operations such as insurance.

5. CONCLUSIONS ON THE FINDINGS OF THE WOODLAND TRUST'S SITE TRANSFER PROGRAMME IN WALES AND FUTURE COMMUNITY WOODLAND ENGAGEMENT

At present the Site Transfer Programme in Wales is very limited and only one CWG has signed an agreement on a WT site and a 2nd group is in the process of negotiating a lease with the WT. However from this survey, there are a number of opportunities which could support increased Community Woodland engagement on WT sites in the future:-

- The WT in Wales is actively supporting CWGs through funding for Llais y Goedwig
- 23 WT sites have been identified where the WT could encourage new CWGs to establish
- A number of CWGs are interested in taking over the management of a WT site
- Existing CWGs are keen to support new CWGs on a WT site through a peer mentoring scheme
- CWG are keen to undertake more woodland training and other skills to increase their confidence to take over the management of a WT wood

There are also several obstacles which need to be overcome to ensure the WT can fulfil its policy of supporting communities to take over the management of WT woods in Wales.

- The WT staff resource is limited so the WT need to find alternative ways to support new CWGs on its sites eg helping to fund a Development Officer, supporting funding CWG peer mentoring for new CWGs, using individual negotiators such as Green Valleys in Brecon to support new CWGs.
- WT staff need to be well informed about CWGs who are mostly volunteers in order to support their enquiries in a professional manner eg direct CWGs to sources of funding, publicity opportunities, legal advice, etc.
- The WT should encourage CWGs to develop as social enterprises in WT woods providing the social enterprise does not impact on other woodland users.

The WT site transfer programme in Wales using CWGs is at an early stage. From these findings, there are a number of opportunities which indicates that this initiative can be successful but the WT needs to ensure that the CWGs are well supported so that they can manage a WT woodland sustainability in the long term.