

THE UPPER AXE LANDSCAPE RECOVERY PARTNERSHIP

DEVELOPMENT PHASE ACTION PLAN

This document, which is supplementary to our Annex F Proposal Form, sets out the work that we will undertake during the Development Phase of the project, between September 2022 and September 2024.

Contents

1. Development Phase Project Management	1
1.1 The legal entity.....	1
1.2 Staff	3
2. Land Management Masterplan.....	4
2.1 Overview	4
2.2 Individual Farm Management Plans	5
2.3 The Capital Programme	6
2.3.1 River Channel Restoration Programme	6
2.3.2 Access Programme.....	7
3. Monitoring, evaluation and learning strategy	7
4. Community engagement plan.....	8
5. Implementation Phase Governance and Management.....	8
6. Investment Plan	9
7. Implementation Agreement	9

1. Development Phase Project Management

1.1 The legal entity

As outlined in the Project Proposal Form, the Upper Axe Landscape Partnership CIC (“the CIC”) will be formed specifically to coordinate the partnership and manage the Development Phase. The founder members of the CIC will be appointees of the Magdalen Environmental Trust and The Axe Vale Rivers Association. The CIC will be a large membership model CIC limited by guarantee. All the landowner project partners will be members and they will appoint a Board of Directors to act as the executive for the partnership. Two seats will be reserved for representatives of the Magdalen Environmental Trust and the Axe Vale and Rivers Association.

The formation of the CIC is necessary because the Magdalen Environmental Trust, whilst willingly acting as the coordinator for this application, and the initial owner of the CIC, (prior to its independence), is not the right vehicle to deliver the Development Phase. The charity’s objects are not readily applicable to the work entailed; additionally, the increase in turnover resulting from managing the project directly would distort its accounts, which would weaken its appeal to the

charitable trusts on which it depends for much of its funding for educational and therapeutic work. Finally, and most importantly, the partnership will be far stronger and more effective by being managed through an entity that it collectively controls, and all partners can rightly feel a sense of ownership.

The Upper Axe Landscape Recovery Partnership CIC will be established under the wing of the Magdalen Environmental Trust, an organisation of over 30 years' standing, but it will be a single legal entity in its own right. It is expected to move out of the Magdalen Environmental Trust's ownership at the end of the Development Phase, as long as the following conditions are both met:

- The company Members (who are the project partners), after taking independent advice from a chartered accountant (the project's Financial Adviser), choose to make the CIC independent of Magdalen, and resolve to do so in an AGM / extraordinary general meeting.
- Independence from Magdalen does not jeopardise the Landscape Recovery Project funding. As the project funder, DEFRA (or any body it devolves responsibility to), will have the right to insist the CIC remains under the auspices of the Magdalen Environmental Trust.

The evolution of the Upper Axe Landscape Recovery Partnership CIC



The formation of the CIC has already commenced. The application to the CIC Regulator is underway and we expect the CIC to be approved by mid-June at the latest. Once formed, the opening of a bank account is expected to take no more than 4 weeks. We have discussed the project with our bank, (Triodos Bank), who are wholeheartedly in favour and understand the need for speed.

Initially under the Magdalen Environmental Trust's ownership, the organisation will be ready to complete the enrolment phase as required.

The Board will take all decisions for the project on behalf of the partnership and its agenda and minutes will be available to all partners. It will meet monthly for the duration of the Development Phase. All the members of the CIC will meet (virtually or in person) quarterly as the Project Partnership Group, for the duration of the Development Phase, to keep partners informed, feedback on developing issues, share experience and hold focused workshops to refine aspects of the project.

1.2 Staff

The CIC will employ two full-time members of staff who will be recruited immediately upon the commencement of the Development Phase. Allowing for recruitment at the beginning of September they are expected to be in post by early December.

The **Project Manager** will be responsible for:

- Coordinating the partnership and ensuring excellent communications with members
- Organising meetings of the partners and the Board of Directors and coordinating and providing reports on progress to these.
- Reporting to the Environment Agency (EA) and DEFRA.
- Procuring and commissioning the consultant team and coordinating its work, including integrating with specialists provided by the EA and other agencies.
- Ensuring the project is delivered to a high quality and is responsive to emerging risks, opportunities and constraints.
- Ensuring that targets are met and gateway tasks are completed on time and to budget.
- Working with the Farm Advisor to integrate the Farm Management Plans with relevant consultant reports.
- Producing an overall Project Land Management Masterplan ready for the Implementation Phase.
- Working with the Financial Advisor to manage the project's finances and produce financial reports for the Board and funding partners.
- Coordinating community stakeholder engagement according to our community engagement and communications plan, working with partners to deliver this effectively.
- Working with the monitoring and evaluation consultant to help integrate their work across the project.
- Working with the private investment contractor to ensure the Funding Plan is closely aligned with the project's outcomes as the project develops and opportunities for private investment are maximised.
- Managing the CIC's day to day operations, assisting in the governance review and reporting to the CIC Regulator annually.
- Taking part in Landscape Recovery programme learning opportunities.
- Preparing all relevant documents and materials for the Implementation Phase.

The **Farm Advisor** will be responsible for:

- Working with the landowners and farmers involved across the Project Area to develop individual Farm Management Plans, with input from specialists of multiple disciplines within the DEFRA family and the consultant team.
- Integrating the Farm management Plans, together with the Project Manager and the consultant team, into an overall Project Land Management Masterplan.
- Feeding in to financial, contractual and risk management plans to ensure these are robust and suitable for the partners and the realisation of the project aims.
- Supporting Project Partnership Group meetings and workshops to ensure the partners are well aligned, sharing learning and maintaining momentum across the partnership.
- Reporting to the Board of Directors and attending Board meetings as required.
- Supporting the delivery of the community engagement plan.
- Taking part in Landscape Recovery programme learning opportunities.

The CIC will commission an experienced senior project manager (1 day / week) and an experienced ecological professional (1 day / week) on a consultancy basis to support the Project Manager and Farm Advisor on a day-to-day basis. These roles will be commissioned immediately upon commencement of the Development Phase in order to oversee the early stages and the recruitment of the staff team and subsequently to help ensure that the staff team performs its functions effectively and is delivering in line with the requirements of the project.

2. Land Management Masterplan

2.1 Overview

The Land Management Masterplan will provide a complete and detailed description of all land-related elements to be delivered in the Implementation Phase. It will include:

- Individual Farm Management Plans for each farm, which will:
 - Detail future changes in land use and management on a field-by-field basis and the payments that will be needed to deliver these.
 - Agree options for increasing public access to the river
 - Analyse current agreements in place and how these require amendment or integration into future agreements.
 - Describe any capital works due to be undertaken and the implications in terms of costs, timings and contractual agreements.
 - Detail environmental and social outcomes delivered by each farm holding.
 - Detail impacts on income, viability and food production.
 - Detail any exceptional risks pertinent to a specific land holding.
 - Detail a timetable for implementation.
- The combined land management and land use changes that will be delivered across the Project Area by all the farms involved.
- Our overall capital programme of river restoration works, wetland creation and other major interventions including new public access creation and interpretive provision, with full costings, presented as a coherent package of works across all farm holdings.

- The relationship of these changes to each other and how they integrate across our Project Area and into the wider landscape to create and contribute towards nature recovery networks and other ecosystem services, including public access to and enjoyment of the project's outcomes.
- A timetable for the Implementation Phase with milestones and key delivery responsibilities, indicating critical pathways and dependencies.
- An assessment of the outcomes for water quality, biodiversity, flood risk reduction, carbon sequestration and public health and wellbeing.
- An assessment of the impact of the changes on farm incomes and viability and on food production.
- A detailed risk management plan.
- A detailed analysis of how different funding streams identified in our Funding Plan relate to individual farms, including the targets that they will need to achieve and the contractual relationships between individual landowners, the CIC and funders that will underpin these commitments, to ensure that funders and other partners can have confidence in the longevity of the outcomes.

2.2 Individual Farm Management Plans

Farmers often receive disjointed or conflicting specialist advice and have the challenge to decide which advice to follow. Environmental and regulatory advice tends not to go far enough to assess the impacts on the farm business (e.g. taking priority habitats out of production), whilst business advice often pushes for specialisation and yields where environmental issues are not fully costed.

The Triple-Axe Project (see attached Triple-Axe Action Plan), in response to these issues, has developed a new farm advice model which integrates environmental, agronomy, livestock and business advice. In 2021-22 the project trialled getting specialist advisers to sit at the same table with the farmer to test whether they can come up with a truly integrated and sustainable action plan for the future – called a **Farm Transformation Plan** (FTP). The learning from this process, which is ongoing in 2022-23, is informing the approach we will take with our partnership in the Upper Axe.

Adapting the principles of the FTP, each farm in our Project Area will be assessed by specialists in the following fields:

- Farm Business Advice, including an assessment of current farm profitability, how food production will be impacted by changes in land use or farming practices.
- Soil Management, including an assessment of soil types and condition (including compaction, soil organic carbon) across the farm, and projecting future changes.
- Nutrient management, calculating current nutrient loading and budgets and projecting future changes.
- Agronomy/cropping/livestock nutrition, including review of rations and nutrition, milk yields and impacts of more extensive systems.
- Ecology and Nature-Based Solutions, including a Phase 1 habitat survey, identification of opportunities for nature recovery and links to nature recovery networks.
- Hydrology and Geomorphology, assessing the current condition of the river channel and floodplain (where relevant) and opportunities for restoration.

Some of these assessments will be generated through Project Area-wide studies (hydrology, ecology, soils) and the remainder will be specific to each farm. Some individual owners' parcels of land in the

Project Area are relatively small, and these will be bundled with other similar-sized parcels for cost effectiveness.

The Farm Advisor will work closely with the specialists in all cases and act as the intermediary with the landowner and tenants and will convene meetings where proposals can be developed.

The Farm Advisor will, with support from the EA and DEFRA and other advisors, review current agreements held by the farmer and how these could help deliver the changes needed or may need amendment or adaptation into new agreements that will secure the activities and outcomes required for the duration of the Implementation Phase.

The Farm Advisor will also match the funding opportunities identified in the Funding Plan to the context and opportunities provided by each individual farm and identify the contribution that it could make to securing outcomes that will attract private or other public investment.

The Farm Advisor will also liaise with the landowner / farmer to develop opportunities to improve public access, where these are viable, and to develop activities on the farm that involve people in conservation work or learning, where appropriate, and will build these into the plan.

The outcome will be an Individual Farm Management Plan that provides a clear roadmap for the Implementation Phase for each farm.

2.3 The Capital Programme

2.3.1 River Channel Restoration Programme

The goal of the river channel restoration programme is to identify a series of in-channel and floodplain interventions in the project's Core Area that will enable the river to reconnect with its floodplain and reverse a centuries-long trend of channel scouring and deepening.

The first step will be to carry out an intensive walkover of the river and tributaries to scope out opportunities and constraints. Julian Payne, a geomorphology specialist from the EA, who has assisted with the development of this proposal and played a lead role in the Magdalen Farm Large Woody Dam project in 2021, has offered to carry this out as part of his support for the project.

The results of the walkover and soil survey will inform the detailed briefs for a series of specialist studies, which will be commissioned following the walkover. These will comprise:

- A geomorphological assessment of the condition of the river system including establishing the current baseline for future monitoring and with a high level option appraisal for interventions. This will be sufficient to identify opportunities in the tributaries but main river works will require more detailed assessment, as outlined below. This will include a drone survey of the whole Core Area.
- An ecological assessment of the river system corridor together with an Extended Phase 1 Habitat Survey of the surrounding floodplain. This will establish a baseline for future monitoring, identify any protected species, priority habitats and invasive species, review nature recovery network opportunities and generate a high-level option appraisal for interventions including wetland and wet woodland creation.
- Detailed plans for channel realignment and floodplain reconnection using paleochannels at three locations identified by the option appraisals. This requires carrying out topographic and bathymetric surveys, modelling the hydrology and undertaking detailed design.

- In three other locations, similarly identified, design large woody dam features on the scale of the Magdalen Farm project (each occupying approx. 500m of the main river channel).
- In a further three locations carry out feasibility studies for river bed reconstruction with gravel augmentation.
- For all of the above, consents for the works will be obtained and the works will be fully costed.
- The above programme will be integrated with the land management plans for each farm and designed to maximise ecosystem service benefits and the creation of nature recovery networks.

2.3.2 Access Programme

The aim of the Access Capital Programme is to create an Upper River Axe Trail, linking existing public rights of way, as proposed on our attached trail map. Landowners have not yet had chance to select areas of their holdings for enhanced public access, and therefore a feasibility study is needed in the first instance. We will liaise closely with Dorset and Somerset public rights of way staff, and with the Farm Advisor, to identify opportunities, liaise with landowners and agree mitigation measures (eg additional fencing against grazed areas). The trail would develop new permissive paths that would follow land beside the river that is being given over to re-naturalisation.

Once the agreement of landowners has been secured, the consultant will develop detailed specifications and costings for the creation of the new public access routes.

3. Monitoring, evaluation and learning strategy

At the beginning of the Development Phase we will commission a monitoring, evaluation and learning (MEL) consultant to develop a MEL Strategy. This will guide the way we manage the project during the Development Phase and will evolve into the final MEL Strategy for the Implementation Phase.

At this stage, the data that we believe will be important to capture and will provide our key performance indicators for the lifetime of the project across the Project Area are:

- Water quality indicators: turbidity; phosphate levels; dissolved oxygen; temperature.
- River channel indicators: extent of gravel beds, spawning gravels and *Ranunculus* beds; extent of eroding river banks.
- Flood indicators: water levels at properties at risk downstream.
- Biodiversity indicators: fish records from electro-fishing; otter signs; aquatic invertebrate sampling; butterfly numbers; bat records.
- Soils indicators: levels of compaction; soil organic matter; soil organic carbon.
- Priority habitat indicators: extent and condition of wetlands, wet woodland, other woodland, hedgerows, semi-natural grassland etc.
- Agricultural indicators: farm incomes and viability; livestock numbers; total land use; area of maize cultivation; total food production.
- Carbon sequestration: total carbon sequestered by the project and CO₂ equivalent saved.
- Health and wellbeing indicators; numbers of people accessing the river; numbers volunteering; numbers taking part in campaigns to improve water quality from the home;

numbers of people with protected characteristics demonstrating membership of groups that are under-represented in the countryside or in nature conservation included in the above.

The MEL consultant will review these and refine them alongside the consultant team and other advisors. The MEL Strategy will define appropriate monitoring methods and metrics and using these we will undertake a full audit to establish the baseline against which future changes will be evaluated. This audit will access the data from the numerous studies undertaken for the Development Phase as well as any specific additional studies or public surveys required. Where possible we will use existing citizen scientists or train up new ones to carry out these studies, or access data that already exists (eg EA water quality and fish records, Riverfly survey results).

We will also set targets for these KPIs for the Implementation Phase and set out a plan for the measurement, evaluation and reporting of these over the whole project period. The plan will identify the costs of collecting and evaluating the data, who will be responsible for doing the work and in what formats it should be presented.

Our MEL consultant will also develop the learning element of the project and ensure that we capture the learning that is being generated amongst the partnership, share this with others, and benefit from the learning opportunities that will be available through the project.

4. Community engagement plan

At the beginning of the Development Phase we will commission a community engagement specialist to work alongside the already experienced team at the Magdalen Environmental Trust to develop a community engagement and communications plan. This will initially shape our approach during the Development Phase and will ultimately generate a plan for the entire Implementation Phase.

The plan will:

- Identify the stakeholders who are likely to be affected by the project including local residents and businesses, community groups, agencies, infrastructure organisations and public services.
- Analyse the needs and expectations of the different stakeholders.
- Develop key messages aligned to different audiences and design communication techniques and approaches suited to these audiences.
- Plan an engagement and consultation programme to ensure stakeholders understand the project and are able to give feedback and contribute ideas.

The plan will be implemented during the Development Phase by the Partnership working closely with partner organisations in the community. The Project Manager will coordinate delivery of the plan.

5. Implementation Phase Governance and Management

The large membership model CIC structure that we have adopted for the Development Phase is, we believe, well suited to also delivering the Implementation Phase.

During the Development Phase we will establish systems and procedures to ensure that the Implementation Phase is delivered in a robust and accountable manner. We expect to employ a

Project Manager in a full-time capacity for the duration of the implementation of the capital programme, which could be a period of up to 5 years. After that there will be a need for the CIC to continue to monitor the delivery of agreements and contracts entered into collectively by partners through the CIC and to identify and manage risks as they emerge. This will be achieved either through a part-time employee or a secondee from a partner organisation.

6. Investment Plan

At the beginning of the Development Phase we will commission a Private Investment consultant to develop our Investment Plan. This consultant will build upon existing strong relationships in the catchment, established through the Triple-Axe Action Plan process, with the private sector. These include the water companies, South West Water and Wessex Water, with the former concerned about water quality in the River Axe further downstream and the latter concerned about flooding of its Chard Junction STW. Another sector is property development, which is affected by a ban on any development that increases pollution of the River Axe, meaning that developers are seeking nature-based solutions that can mitigate the impacts of development.

We anticipate that the project's carbon sequestration, natural flood risk reduction, nutrient reductions and biodiversity net gain potential is significant and is likely to attract the interest of private investors. Matching private investment to the public investment being made secures benefits for all parties.

We have followed closely the evolution of Devon's Natural Capital Marketplace and the Somerset Catchment Market and anticipate being able to work with these entities to connect to potential investors and shape a package that will be of great interest.

Our consultant will:

- Develop a funding model for the private and public investment anticipated, ensuring transparency and additionality and including a timetable for the lifetime of any contracts.
- Advise on and help secure the methods and conditions required to attract investors including the organisational structure required and the packages involved.
- Guide the project team to ensure their work aligns with these requirements and the information needed is developed in the appropriate format and with appropriate underpinning evidence.
- Develop a business model and investment case that communicates the ecosystem services benefits available and explain how they will be packaged and secured for buyers.
- Hold in-depth meetings and negotiations with buyers to establish their appetite for purchasing ecosystem services.
- Bring into to the project a list of potential private sector corporate investors keen to find an environmental investment which best matches their business portfolio.
- Reach agreements with buyers and investors for delivery during the Implementation Phase.
- Keep the project abreast of national and international green finance initiatives and any learning to be gained from these.

7. Implementation Agreement

The local authority consents required to carry out the capital works will be secured during the Development Phase by our consultant team or by landowners as necessary. The Environment Agency, which is entirely supportive of this application, has confirmed that their consent will not be needed in addition to planning permission, as the project area is in the Upper Catchment.