THE COUNTRYSIDE STEWARDSHIP SCHEME

MONITORING AND EVALUATION OF THE COUNTRYSIDE STEWARDSHIP SCHEME

OVERVIEW REPORT

by

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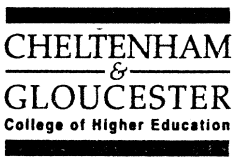

CSS OVERVIEW REPORT

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EXECUTIVE SUMMARY

1.1 This report summarises the results of a three year contract to conduct an environmental evaluation of the Countryside Stewardship Scheme (CSS) undertaken for MAFF by ADAS, the Centre for Ecology and Hydrology (CEH, formerly ITE) and the Countryside and Community Research Unit (CCRU) of Cheltenham and Gloucester College. It formed part of an ongoing evaluation of the overall performance of the Scheme. The specific objectives were to:

- assess the overall environmental impact of the Scheme, particularly in relation to its stated objectives;
- make recommendations on the effective implementation and development of the Scheme.

1.2 CSS is a grant scheme to encourage farmers and other land managers to adopt particular conservation measures with a view to making conservation part of normal farming and land management practice. The aims of the Scheme are to:

- sustain the beauty and diversity of the landscape;
- improve and extend wildlife habitats;
- conserve archaeological sites and historic features;
- improve opportunities for countryside enjoyment;
- restore neglected land or features;
- create new wildlife habitats and landscape features.

1.3 The structure of the monitoring programme (Figure 1.1) demonstrates the division of the work as it was carried out in this project. Module 1 comprised a detailed evaluation of a sample of 484 management agreements from the 12 landscape types (i.e. those landscapes specifically targeted by the Scheme), in terms of their objectives, appropriateness, environmental effectiveness and feasibility. These evaluations were carried out over the three year period 1997 to 1999, involving four landscape types in each of the three years and drawing the sample of agreements from those signed in the previous year wherever possible. Separate studies were conducted on the operation of the scoring system, and on the contributions made by management plans and special projects.

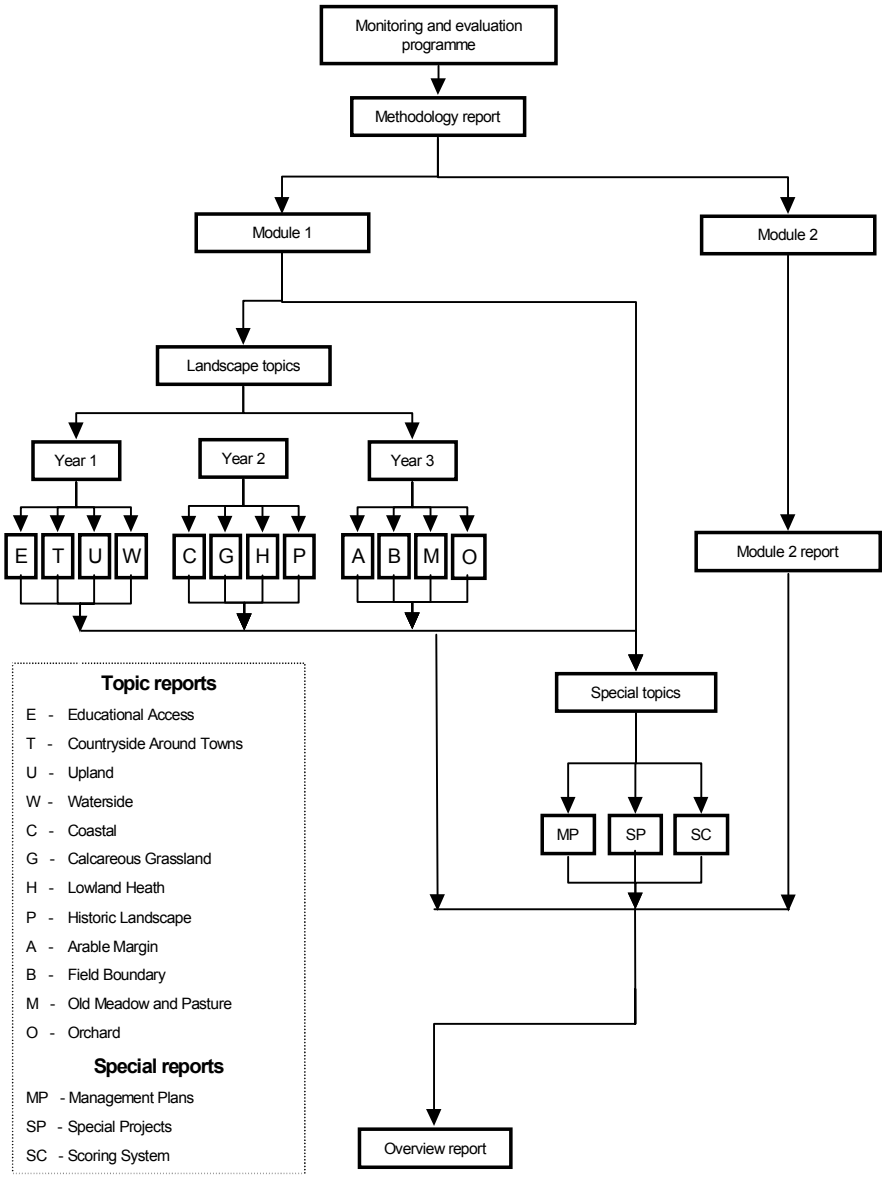
1.4 A holistic examination was conducted for each agreement in the sample, covering wildlife, landscape, access and the historical aspects of the Scheme. The assessments covered the entire holding, not just the agreement land, so that the cross compliance elements of the Scheme could be examined. Ultimately, the individual agreement assessments combined to produce evidence of the potential environmental impact of the Scheme at both the landscape type and Scheme scales.

1.5 The methodology developed for Module 1 had at its core an Appraisal, which involved a review and assessment of each sample agreement by a multi-disciplinary team of specialists. Each agreement was evaluated and scored against five criteria:

- agreement negotiation;
- appropriateness;
- environmental effectiveness;
- compliance;
- side effects.

It also included an assessment of additionality and value for money provided by the agreement.

Figure 1.1 - Structure of the monitoring and evaluation programme for the Countryside Stewardship Scheme



1.6 Module 2 was centred on a field survey performed to assess the ecological quality of the agreement land at both national and regional scales. 451 agreements dating from 1991 to December 1997 were surveyed. The objectives of the ecological evaluation were to:

- obtain national estimates of vegetation character, and hence ecological quality of all agreement land;
- obtain national estimates of the extent of BAP Broad and Priority Habitats under CSS Agreements;
- obtain national estimates of vegetation character, and hence the ecological quality, of Priority Habitats on Agreement land;
- analyse the results in relation to geographic location, agreement age and type, CS2000 results and other factors as appropriate; and
- establish a baseline for the future evaluation of changes in ecological quality.

1.7 Individual landscape topic and special topic reports have addressed issues specific to those individual areas, as well as making recommendations relevant to the Scheme as a whole. Executive summaries of Module 1 and Module 2 reports are held in Appendix 1 of the Overview Report. The overview report does not seek to duplicate these individual reports but attempts to take a composite view of the whole monitoring and evaluation programme in order to:

- review and assess the methodology of the evaluation process, and on the role of the various stages of that process;
- present and discuss the aggregated results of the monitoring programme;
- make strategic recommendations on the development and monitoring of the Scheme.

1.8 Results and conclusions specific to individual topics can be found in the Topic Reports. The Overview Report summarised the results of the appraisal process for the landscape topic reports as a whole, looking in particular at the performance of the Scheme in terms of the criteria used in the appraisal (see para. 1.5 above). A Principal Components Analysis (PCA), a multi-variate analysis technique which combined the results of all five of the main appraisal criteria, indicated that the Scheme was performing well when judged against these measures (Appendix 4).

1.9 The appraisal scores from the twelve landscape topic reports were also analysed individually for each of the appraisal criteria, providing further measures of Scheme performance. In the appraisal, scores were awarded in the range –5 to +5 for each criterion. All criteria scored positively, with *environmental effectiveness* and *compliance* being most notable, as follows:

- *Agreement negotiation* – mean score +1.9 (Standard Deviation(SD) 1.9), a significant improvement over the three years.
- *Appropriateness* – mean score +2.1 (SD 1.7).
- *Environmental effectiveness* – mean score +2.4 (SD 1.5), significant improvement over the three years and some significant differences between landscape types.
- *Compliance* – mean score +3.1 (SD 1.7), some significant differences between landscape types.
- *Side effects* – mean score +0.8 (SD 1.1).

Also, the *Additionality* from agreements increased over the three years, with many more agreements adjudged to be delivering high additionality in the final year.

1.10 The special topic reports on Management Plans and Special Projects examined the rôle of these two instruments on the success of the Scheme. Management Plans in

the sample (both mandatory and voluntary) were, in the majority of cases (63%), considered to be satisfactory or better for the purpose, with 34% assessed as excellent. On the other hand, 37% were regarded as unsatisfactory. Special Projects in all cases examined were regarded as helping to meet the agreement objectives, with most providing direct environmental benefits.

1.11 The special topic report on the Scoring System, which evaluated the 1998 scoring system and made some comparisons with the modified system used in 1999, found a number of areas where anomalies and inconsistencies occurred, but also found that improvements had been made in 1999.

1.12 The Module 2 analysis of land in CSS agreement found that the most widespread Broad Habitat was Improved Grassland (>50% of agreement land). Priority Habitats accounted for 15% of agreement land, calcareous grassland, heathland and acid grassland being the most common. Vegetation analysis showed that 53% of quadrats were classed as Countryside Vegetation System (CVS) Infertile Grassland and 24% as CVS Fertile Grassland. In comparison with results from CS2000, the Scheme has a greater proportion of grassland habitats than the countryside as a whole and these are of greater conservation value.

1.13 The overview report draws together recommendations arising from the topic reviews affecting the Scheme as a whole. A brief summary of the main issues identified in each of the categories is presented in the following sections.

Agreement Negotiation

1.14 The **scoring system** needs further fine tuning so that both the Initial and Full Assessments take equal account of each of the Scheme objectives. Fuller account should be taken of other complementary environmental schemes and locally important sites. The distinction between inherent value and enhancement potential should be strengthened.

1.15 In undertaking **agreement negotiation**, Project Officers (POs) need to ensure that communications with applicants are clear and unambiguous, and that all correspondence, both written and verbal is recorded on file.

1.16 **Consultation** must take place as early as possible in all applications with appropriate consultees, and evidence of this recorded on the agreement file. A stronger mechanism is required where a statutory environmental designation exists on or adjacent to the holding.

1.17 Avoidance of **missed opportunities**, particularly related to historical and archaeological features and access, needs a higher profile in the site visit itself and in gathering information related to the holding. Applicants should be encouraged to use partner organisations and POs should be trained in identification and protection of historic features.

Appropriateness

1.18 Greater care needs to be taken in the preparation and management of the **agreement file and agreement document** to ensure that they are clear, comprehensive and correct, and that all other relevant documentation is included in the file and properly cross-referenced. Other CSS or agri-environment schemes on the

holding should be referenced and (preferably) mapped. Agreement maps need to be as comprehensive as possible within the limitations of the administrative budgets for the Scheme.

1.19 **Agreement objectives** should be associated with specific items of work and each item of work should be helping achieve at least one objective. All agreements should have wildlife, landscape, historical and access objectives, and they should be as clear, unambiguous and site specific as possible. Wherever there are important environmental designations, BAP species or habitats, or other environmental schemes on a holding, they should always be addressed in the agreement objectives.

1.20 POs should ensure that **management prescriptions** are clearly worded and unambiguous, especially for non-technical agreement holders, and provide site-specific detail. Contradictory prescriptions, benefiting one environmental aspect while damaging another, or not taking account of national action programs (e.g. BAP) must be avoided.

1.21 The impact of **county target** areas should be monitored and reviewed every three years. National objectives and target landscape types should be reviewed every five years. All sites should be considered within the context of the recognised regional character of the area.

Environmental Effectiveness

1.22 In considering **managing grassland** over the scheme as a whole, improved grassland fields should not be included in agreements unless they are:

- to be enhanced by the addition of wild flowers;
- to act as buffers to SSSIs or other areas of significant environmental value;
- of historical importance (e.g. ridge and furrow); or
- threatened by the introduction of more intensive arable farming.

Prescriptions for their management, re-seeding and the recreation of wildflower meadows should be detailed and specific, including appropriate seed mixtures. Where grazing management is planned, prescriptions must be site-specific and time-based, related to both the stock available and the herbage.

1.23 In **managing heathland,** the division between Lowland Heath and Heather Moorland needs to be related to herbage type rather than just elevation so that appropriate management prescriptions are applied.

1.24 When specifying work on **capital items** particularly involving field boundaries, the traditional/historic nature of the site and the materials needs to be fully considered. All capital items should have detailed prescriptions.

1.25 Where a **management plan** is a requirement of the Scheme, POs should ensure that it is in place, on file and being followed. Plans should also be encouraged for other complex or demanding work in non-mandatory situations, and a pro-forma and a library of plans might help in this regard. Higher standard plans, including objectives, contextual information, evaluation and a work programme would be beneficial for all but the simplest of programmes.

1.26 **Special projects** should be fully described in the agreement objectives and prescriptions.

Compliance

1.27 In order to ensure **compliance** as far as possible, POs should ensure at the agreement negotiation stage that the applicant has the financial and labour/contractor resources to undertake the proposed work, and that he fully understands the objectives of the Scheme. Greater emphasis should be placed on landowner/tenant partnerships in agreements.

1.28 The **cross-compliance** requirements of agreements need to be emphasised so that agreement holders are fully aware of their responsibilities, with particular reference to the maintenance and management of historical boundaries. Within the limitation of budgetary constraints on the administration of the Scheme, a more comprehensive approach should be adopted towards mapping of cross-compliance features.

1.29 Recommendations for strategic improvements to CSS are as follows:

- MAFF should consider a simplified entry-level scheme for 'new conservationists'.
- MAFF should consider how adjacent landowners could be encouraged to protect environmental features that run through multiple holdings.
- MAFF should consider allowing agreements to be "updateable" rather than having multiple agreements on one holding.
- Where the restoration of features such as field boundaries is targeted on the agreement map for a future agreement there should be a clear procedure for revisiting after a specified time to initiate the restoration required.
- POs should be aware of the tendency for single sector organisations to focus on the environmental issue of most importance to them at the expense of others and compensate for this. There should also be consideration of a means of co-ordinating the handling of applications from these organisations.
- The payment rate for assistance in preparing an application should be reviewed including whether a standard or variable payment should be used.
- Consideration should be given to the appointment of a PO to co-ordinate educational access issues in each Region.
- The principle of 'lead' landscape types for categorising CSS agreements should be reviewed.
- There should be consideration of a review of how BAP species and habitats, and also farmland birds can be further integrated in CSS. MAFF should also consider the need for a similar framework to promoting and incorporating wildlife interests through BAPs for landscape, historic and access.
- MAFF should consider including woodland management in the Scheme.
- The MAFF Special Projects database needs to be improved, and regularly updated and maintained.
- The whole range of management prescriptions used in CSS should be put out for consultation to the National Rural Development Forum periodically for a major

review. There should be an opportunity for partners to comment on existing prescriptions and suggest changes resulting from existing research findings.

- Consideration should be given to making the creation and retention of winter stubble a routine management item throughout England, to provide wider benefit to farmland birds and small mammals (assuming the trials under the Arable Stewardship pilot scheme indicate that the management works).
- Consideration should be given to making the casting up of earthbanks a routine management item and to making restoration plans and interpretation boards standard capital items.
- There should be a review of how 'after-sales' information and advice services can be improved.
- There should be a review of how a training service could be integrated with the Scheme.
- The means by which ongoing research into the management of agricultural land for environmental benefit can be effectively disseminated to POs needs to be considered, so that it can be used to formulate effective agreements.

1.30 The methodology adopted to undertake the monitoring and evaluation programme was considered against possible future requirements. Broadly, it was concluded that the methodology was repeatable, given the same degree of expertise of the evaluation team. Whilst the components of the data collection phase (desk study, farmer interview, field visits) could each be updated to reduce costs or improve the consistency, extent or basis of the data collected, all were seen as essential elements of the appraisal process. Further consideration was given to alternative ways of monitoring the future performance of the scheme with particular reference to the use of indicators. Indicators could be valuable in monitoring both actions required by applicant or PO (e.g. number/percentage of consultations) or in monitoring the resource either protected or enhanced (e.g. area/percentage of land reverted to grass)

INTRODUCTION

Background to the Countryside Stewardship Scheme

2.1 CSS is a grant scheme that offers payments to farmers and other land managers for conservation of the countryside. It aims to make conservation part of normal farming and land management practice.

2.2 In general terms the Scheme seeks to:

- sustain the beauty and diversity of the landscape;
- improve and extend wildlife habitats;
- conserve archaeological sites and historic features;
- improve opportunities for countryside enjoyment;
- restore neglected land or features;
- create new wildlife habitats and landscape features.

2.3 The Scheme operates in England, although nationally it applies to land predominantly outside of Environmentally Sensitive Areas (ESA). The Scheme targets a number of specific landscape types while locally focusing on specific areas within each county. CSS management agreements usually run for 10 years. They provide annual revenue payments for following prescribed management practices, and supplements for additional work over and above annual management, together with additional payments for access and for capital items that contribute towards achieving environmental benefits.

2.4 Currently, in 2000, approximately 10,000 agreements are in operation, throughout England.

2.5 Although launched in 1991 by the Countryside Commission, responsibility for the Scheme was transferred to Ministry of Agriculture, Fisheries and Food (MAFF) in 1996, and CSS is currently run from MAFF's nine Regional Service Centres (RSCs). CSS Project Officers (POs) from the Farming and Rural Conservation Agency (FRCA) provide professional and technical advice to applicants and agreement holders. In a situation where applications normally exceed the available budget, the Scheme seeks to obtain best value for money by directing limited funds towards areas where the greatest benefits are likely to be obtained. Acceptance of land into CSS is at MAFF's discretion and proposals must be judged on the quality of the environmental and recreational benefits offered.

2.6 The PO Operating Instructions suggest that CSS will be judged successful if MAFF can demonstrate either that the quality of the landscape and its wildlife, historic or amenity interest would deteriorate without a scheme, or that desirable change will occur as a result of the Scheme.

The research brief

2.7 The monitoring and evaluation of the CSS was a contract undertaken for MAFF by ADAS, CEH and CCRU. It was a 3-year environmental study, forming part

of a broadly-based ongoing evaluation of the overall performance of the Scheme. The specific objectives were to obtain information that would contribute to:

- an assessment of the overall environmental impact of the Scheme, particularly in relation to the stated objectives for the Scheme;
- the effective implementation and development of the Scheme.

2.8 The work was divided into two related but distinct modules.

2.9 Module 1 involved assessments of a sample of CSS agreements taken from each of the twelve landscape types in the Scheme (i.e. those landscapes specifically targeted by the Scheme), in terms of their objectives, appropriateness, environmental effectiveness and feasibility. It concentrated, where possible, on agreements signed after MAFF took over responsibility for the Scheme during 1996. Separate studies were conducted on the operation of the scoring system, and on the contributions made by management plans and special projects.

2.10 Module 2 studied the botanical characteristics and quality of the land under agreement in the Scheme. The aim was to identify the environmental resource receiving protection under the Scheme and gain national estimates of vegetation character, and hence ecological quality, of all agreement land and in terms of Biodiversity Action Plan (BAP) Broad and Priority Habitats on agreement land. This has also provided a baseline for future monitoring of change in ecological quality.

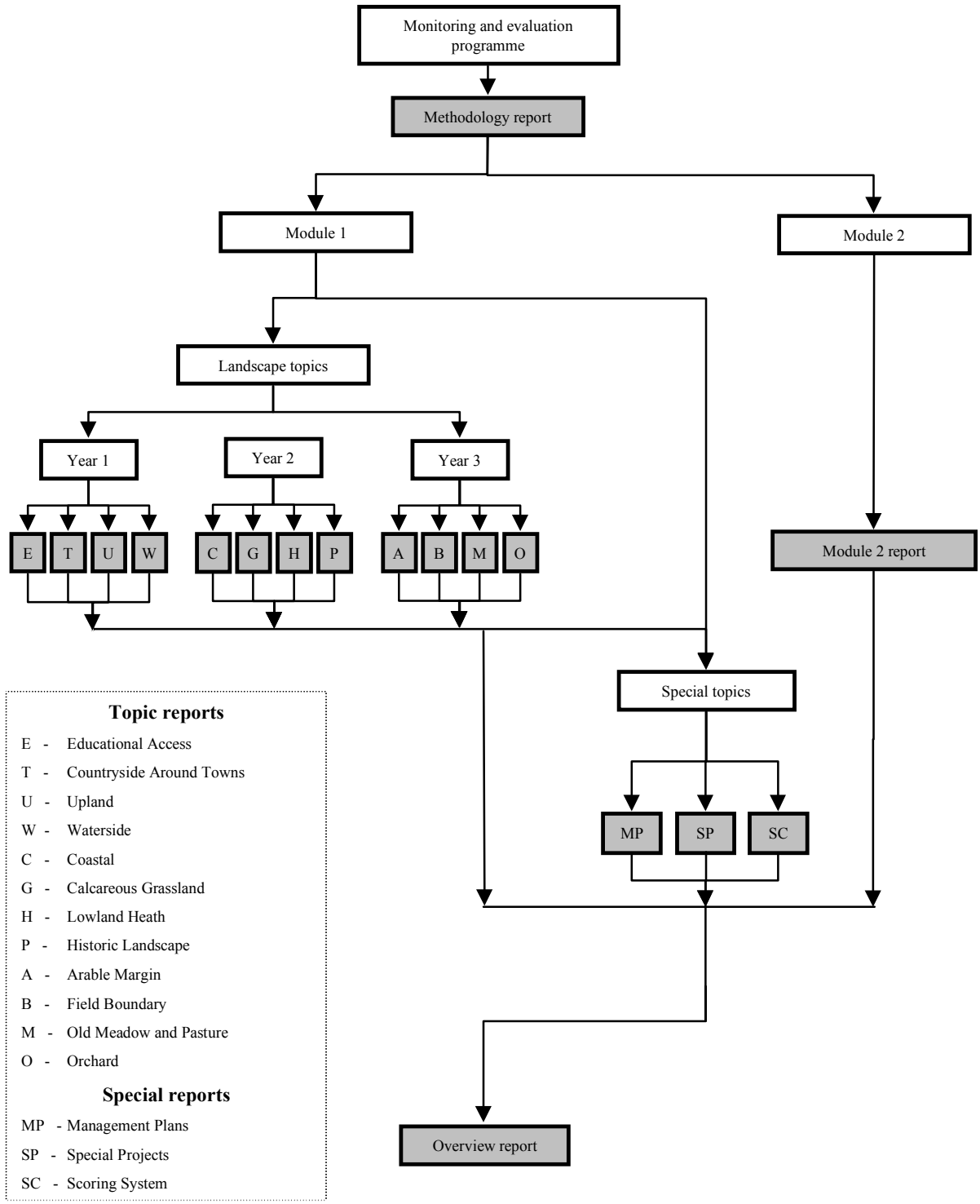
2.11 The structure of this monitoring programme is set out in Figure 2.1, which shows the relationship between each element of the programme in terms of the reports produced. The overview report attempts to bring the entire programme together in one document.

Objectives of the Overview Report

2.12 Individual landscape topic and special topic reports have addressed issues specific to those individual areas, as well as making recommendations relevant to the Scheme as a whole. Executive summaries of Module 1 and Module 2 reports are held in Appendix 1. The overview report does not seek to duplicate these individual reports but attempts to take a composite view of the whole monitoring and evaluation contract, in order to:

- review and assess the methodology of the evaluation process, and on the role of the various stages of that process;
- present and discuss the aggregated results of the monitoring programme;
- make strategic recommendations on the development and monitoring of the Scheme.

Figure 2.1 - Report production within the monitoring and evaluation of the Countryside Stewardship Scheme



METHODOLOGY

Introduction

3.1 The structure of the monitoring programme (Figure 2.1) demonstrates the division of the work as it was carried out in this project. A fuller description of the methodology is given in the Methodology Report[1]

3.2 Module 1 comprised a detailed evaluation of a sample of 484 management agreements from the 12 landscape types to assess the way in which agreements were negotiated, the appropriateness of agreements in relation to the objectives set, the prescribed management, the value for money and additionality.

3.3 More specific objectives for Module 1 were: to obtain information from a survey of a representative sample of Countryside Stewardship Scheme agreements in order to assess, by means of a holistic examination, the potential environmental impact of the Scheme in relation to its overall objectives. In particular to assess whether:

- the objectives agreed for the site were appropriate and adequate, in terms of feasibility and the environmental context or potential of the land;
- the management prescriptions were appropriate in relation to the objectives;
- the agreement was in accordance with a declared targeting strategy;
- the agreement was maintaining or has the potential for enhancing environmental interest which might otherwise have been reduced, lost or not existed;
- the agreement had not, or was not likely to, result in adverse affects or changes elsewhere on the holding;
- the agreement had the potential to provide value for money.

3.4 Each agreement was assessed as a whole, covering wildlife, landscape, access and the historical aspects of the Scheme. The assessments covered the entire holding, not just the agreement land, so that the cross compliance elements of the Scheme could be examined.

3.5 The emphasis in Module 1 was on assessing the operation of the Scheme and on making landscape specific and Scheme-wide recommendations. Thus the monitoring and evaluation process provided a structured and focused way of assessing the strengths and weaknesses of a large number of agreements.

3.6 Module 2 was centred on a field survey performed to assess the ecological quality of the agreement land at both national and regional scales. 451 agreements dating from 1991 to December 1997 were surveyed. These findings will assist MAFF in determining the efficacy of the Scheme in achieving both regional and national targets of habitat protection, including those set out by the Biodiversity Action Plan

[1] Little W, with Short C, Curry N, Carey P, Finch C and Haigh V (2000) *Methodology Report* ADAS/CCRU/CEH report to MAFF.

(BAP) (Cmnd 2428, 1994)[2]. The objectives of the ecological evaluation were to:

- obtain national estimates of the extent of BAP Broad and Priority Habitats under CSS Agreements;
- obtain national estimates of vegetation character, and hence ecological quality of all agreement land;
- obtain national estimates of vegetation character, and hence the ecological quality, of BAP Priority Habitats on Agreement land;
- analyse the distribution of areas and vegetation characteristics of agreement land (with special reference to Priority Habitats) with regard to geographic location, agreement age and type, and other factors as appropriate; and
- establish a baseline for the future evaluation of changes in ecological quality.

3.7 The period of the Module 2 survey (1998-99) was particularly timely in order to achieve these objectives. This was partly because the Scheme had been running long enough (since 1991) so that there were a large and varied sample of agreements, and partly because the survey coincided with the field work for Countryside Survey 2000 (CS2000), thus providing a comparison with the wider countryside. The data were less useful for the analysis of the effectiveness of individual management prescriptions, however, as surveys at the start of the agreement period would have been preferable and also because many of the standard prescriptions of the Scheme varied over the period 1991-1997.

3.8 The approach adopted was to identify a random sample of all CSS agreements, regardless of age, geographic distribution, lead landscape type or management objectives. These sample agreements were surveyed in the field. All land cover under the agreement was allocated to BAP Broad and Priority Habitats and vegetation quadrats were recorded, one at random in each agreement, and one in each of the Priority Habitats found in each agreement.

Landscape topic reports

3.9 In this section the whole evaluation process is reviewed and the role of each task described. The detailed methodology for this project is contained in a separate 'Methodology' report (see 3.1 above). In summary it contained a number of stages:

- Sample design
- Field surveys
- Agreement holder interview
- Desk study of agreements
- Appraisal

3.10 The methodology was designed as a multi-disciplinary process, that brought together specialists in ecology, landscape, historic landscape and archaeology, and the socio-economic aspects of rural policy, in order to fully evaluate each sample

[2] Cmnd 2428 (1994) Biodiversity: The UK Action Plan. HMSO: London.

agreement. This multi-disciplinary team provided an interpretation of field survey, interview and documentary data, appraised holistically to assess the potential success of individual agreements and the Scheme as a whole. The Appraisal Team comprised one member of each discipline led by a chairman.

Sample design

3.11 For each of the three years of the evaluation, four landscape types (or 'categories' in the case of Educational Access) were selected for assessment (Table 3.1). A sample was drawn randomly from agreements signed in the year prior to the evaluation wherever possible. However, in the case of Countryside Around Towns, Historic Landscapes and Coastal agreements, the sample was augmented from earlier agreements because there were not enough agreements signed in the previous year. A target of 500 agreements from 12 lead landscape types was sought and in the event 484 agreements were evaluated.

Table 3.1 - Landscape type and year of assessment for Module 1 evaluations

1997/1998	1998/1999	1999/2000
Educational Access	Coastal	Arable Margins
Watersides	Calcareous Grasslands	Field Boundaries
Uplands	Lowland Heath	Old Meadows and Pastures
Countryside Around Towns	Historic Landscapes (Parklands)	Historic Landscapes (Orchards)

3.12 In outline, the methodology used for Module 1 was a three-stage process:

- data collection;
- independent evaluation of data by experts; and
- discussion and appraisal by experts working together to produce agreed scores.

Data collection

3.13 For each agreement data were collected from six principal sources (Figure 3.1):

- the agreement files held by the Regional Service Centres;
- an interview with the agreement holder;
- an ecological field survey of the holding;
- a landscape field survey (including an access and landscape history survey) of the holding;
- data from County Archaeologists on the historical status of the holding and surrounding area; and
- contextual information about the area surrounding the holding, gathered from national databases.

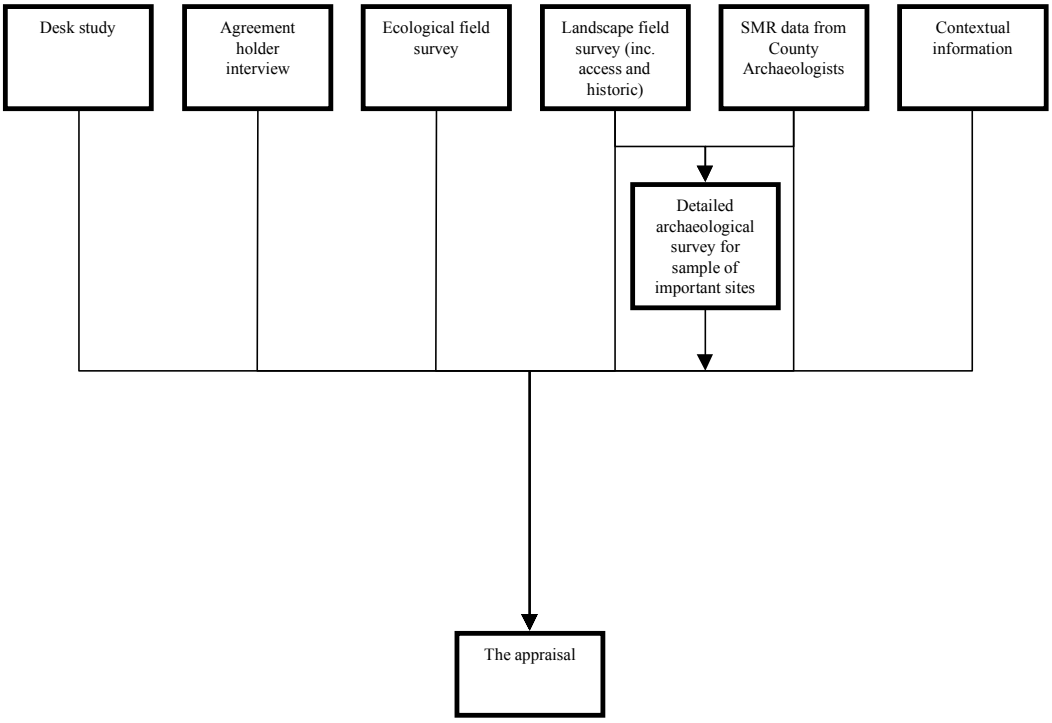
3.14 A smaller sample of sites were surveyed in detail by the landscape historian,

based on findings from the landscape survey and the Sites and Monuments Records (SMR) that indicated features of historical importance. The sites selected fell broadly into the following categories:

- sites potentially at risk from farming activities (as identified from the SMR and/or the landscape survey linked to the type of farming);
- those sites where a specific query had been raised at the landscape survey; and
- sites where the extent or nature of the historical feature was unclear or unknown and required clarification with regard to potentially damaging activities.

However, all sites were effectively screened for historic interest as all received a landscape survey. Those not included in the further historic survey would have had little historic interest.

Figure 3.1 - Data sources used for the appraisal of the Countryside Stewardship Scheme



Desk study

3.15 The desk study comprised a systematic examination of the files held by the MAFF Regional Service Centres (RSCs) for each individual agreement. This enabled the collection of objective data that was essential to the Appraisal Team's understanding of the development and implementation of the agreement and included the following:

- the presentation and nature of the application;
- written guidance given to the agreement holder by an outside agency (e.g. County Archaeologist) or from within MAFF/FRCA;
- consultations with partner organisations;
- the extent, form and contribution of the PO's involvement, including the use of the scoring system;
- the nature of correspondence and discussions between the PO and agreement holder, particularly where the intentions of either the agreement holder or PO were frustrated;
- the presence and extent of existing environmental land management schemes;
- factual details on the contents of the agreement and how it changed from the application;
- information on national and county target objectives relevant to the agreement;
- the presentation and nature of management plans and special projects; and
- information relevant to compliance.

Agreement holder interview

3.16 An interview was conducted face-to-face with each agreement holder using a structured questionnaire. It provided a vital source of information on the agreement holder's attitude to the Scheme, reasons for joining and the likely level of compliance with the agreement. In addition, background information was collected on the holding and agreement land, the source of, extent of and compliance with expert advice, and the anticipated impact of the agreement on the management of the holding. The interviews also provided an important source of information for the appraisal about the negotiation of agreements and the nature and extent of additionality (see paras. 3.29-3.31 for definition). Useful information about the anticipated side effects of the agreement was also derived from the interviews.

Field surveys

3.17 A field survey of each sample holding was carried out, collecting information on the landscape, ecology, archaeology and access provision of the whole holding, covering both agreement and non-agreement land. Field surveyors were not aware of the extent of the land in agreement on the holding at the time of survey. Proformas were developed to collect and record information. In addition, each surveyor supplied a short pen-sketch outlining the importance of each holding from an ecological, landscape and historical perspective. This provided useful supplementary information

for the appraisal process.

Ecological Survey

3.18 The ecology survey used the Nature Conservancy Council's Phase 1 Habitat Survey[3] (England Field Unit, NCC, 1990), identifying different habitats on the holding. This survey technique was devised in the late 1970s and was until 1998 the standard method of carrying out environmental audits in England. In addition to the mapped Phase I information target notes on other ecological features relevant to CSS agreements were added to the map. These included :

- the presence and type (sown or natural regeneration) of arable field margins (not included in Phase I methodology) (see Module 2 report for definitions);
- the ecological value of hedgerows;
- the ecological value of land on the holding; and
- individual features or species of conservation interest.

Landscape Survey

3.19 The landscape survey was devised using recognised methodologies developed within ADAS (see methodology report referenced at para. 3.1). A broad landscape assessment of the land surrounding each holding was undertaken before surveyors began the detailed landscape assessment of the holding itself. Individual features, and the extent to which they reinforced or detracted from the overall landscape character, were recorded including:

- type and condition of boundary features;
- presence of individual mature trees or tree-lines;
- presence of water bodies;
- presence and condition of existing public access on the holding;
- evidence of any tree planting and other environmental work.

Features of historic/archaeological interest were also recorded and included:

- historic landscape features such as ridge and furrow, meadow water channels, etc.;
- important traditional buildings;
- important routeways such as green lanes;
- old parkland features such as pales, ha-has and iron fencing;

Photographs were taken to assist the appraisal process.

3.20 The landscape historian selected a smaller sample of sites to visit, based on features identified from the landscape survey findings and the SMR details, and these comprised a cross section of the 12 landscape types. In these cases a separate

[3] England Field Unit, Nature Conservancy Council (1990). Handbook for Phase I habitat survey: a technique for environmental audit. NCC, Peterborough.

landscape history survey was undertaken and included the identification of features such as:

- old industrial remains;
- earthwork remains of former settlements, fortification or burial features.

Consultation with County Archaeologists

3.21 The SMRs held by the County Archaeologists (CAs) were an important source of information, which informed the landscape historian of the known historic and archaeological interest of the sites. CAs were sent details of the sites being surveyed, with a request for information relating to those sites. Although in the majority of cases a response was received, not all CAs responded to these requests and the information provided was variable in detail and extent, possibly because the source information was itself variable between local authorities.

Contextual Information on the holding and surrounding area

3.22 Information was gathered from national databases that would place each agreement within a contextual framework, giving an idea of its place and importance in the countryside. The contextual file for each agreement gave the County, English Nature Natural Area, Countryside Commission Character Area, ITE Landclass, mean altitude and geology of the 1km square containing that agreement, as well as the surrounding 8km squares and the 16km squares around those. In addition, the presence of designated areas such as National Parks and SSSIs were also given for each 1km square.

3.23 A list of BAP species found in the area of each agreement was supplied to the ecologist on the appraisal team and an attempt was made to determine historical land-use from the Land Utilisation Survey of 1948 for the landscape historian.

Supplementary methodology for Educational Access agreements

3.24 The landscape topic report for Educational Access was based on a sample of 35 agreements, and the methodology employed was the same as the other landscape topics relating to the eleven lead landscape types. Additionally, since Educational Access agreements were concerned with issues relating to the establishment of links with schools and the management of visitors, a supplementary sample and methodology were used. The additional sample comprised the remaining 15 agreements in Year 1 receiving payment for Educational Access, bringing the total to 50. The supplementary methodology was designed to assess both the agreement holders' attitudes towards access for educational purposes and the attitudes of some of the users. Information was collected through supplementary questions inserted into the agreement holder interview and a telephone survey of some potential and actual users. This is described in more detail in section 3 of the Educational Access Report (Curry and Short, 1998).

Appraisal

3.25 The appraisal process is the core of the evaluation. It involved a multi-disciplinary team of specialists, working together to review and evaluate the sample of

agreements. The process was carried out in two stages:

3.26 In the *evaluation*, each expert independently, in relation to their specific interest in ecology, landscape, archaeology, the agreement holder interview and the desk study, provided responses to a series of evaluative questions. These were designed to address specific issues in the evaluation process. The questions are reproduced in Table 3.2 below.

3.27 In the *appraisal*, the appraisal team collectively discussed and appraised each agreement, using the individual expert responses provided in the evaluation stage. An overall summary score and supporting written commentary was produced for each of the following five criteria:

- agreement negotiation;
- appropriateness;
- environmental effectiveness;
- compliance;
- side effects.

An assessment of the additionality provided by the agreement was also undertaken.

Table 3.2 - Evaluative questions by criteria addressed in the appraisal process

Agreement negotiation **is composed of the following questions:**	
Q1	How effective is the scoring system in relation to the agreement and overall criteria?
Q2	How comprehensive, accurate and consistent has the written advice to agreement holders been?
Q3	To what extent have agreements been modified after the first application?
Q4	What has been the influence of the POs and partnership organisations on the final agreement?
Q5	What has been the experience of agreement holders of the advice given during agreement negotiations?
Q6	What opportunities meeting the Scheme objectives have been missed?
Appropriateness **is composed of the following questions:**	
Q7	To what extent are the agreement objectives for the land in question appropriate and feasible (in relation to current and potential environmental quality, or educational and amenity value)?
Q8	To what extent are the management prescriptions appropriate in relation to the objectives of the agreement?
Q9	To what extent do the objectives of the agreement accord with the overall objectives of the Scheme?
Q10	Is the agreement in accordance with national eligible areas and features and county target areas and features?
Environmental effectiveness **is composed of the following questions:**	
Q11	To what extent is the quality and character of the landscape potentially being maintained or enhanced by the agreement?
Q12	To what extent are biodiversity, historical features, access and landscape features potentially being maintained or enhanced by the agreement?
Q13	To what extent are high quality features that are difficult or impossible to replace being maintained or enhanced by the agreement?
Q14	To what extent do management plans contribute to the agreement and its objectives?
Q15	To what extent do special projects contribute to the agreement and its objectives?

Compliance **is composed of the following questions:**	
Q16	To what extent are agreement holders likely to comply with the agreement?
Q17	To what extent do the agreement holders attitudes, motivations, objectives and experience accord with the environmental objectives of the Scheme?
Q18	To what extent are cross-compliance elements of agreements likely to be met?
Q19	To what extent is the agreement holder able to carry out the work prescribed on the agreement land?
Q20	To what extent is the agreement holder satisfied with the agreement?
Q21	What decisions in relation to the agreement land would have been made in the absence of the Scheme?
Side effects **is composed of the following questions:**	
Q22	Is the agreement maintaining, or does it have the potential for enhancing, other environmental quality on the agreement land that might otherwise have been reduced, lost or might not have existed?
Q23a	What are the likely effects or changes in environmental quality on the rest of the holding as a result of CSS participation?
Q23b	What are the likely effects or changes in environmental quality on adjacent land outside the holding as a result of CSS participation?
Q24	To what extent do the agreement objectives take into consideration other applicable environmental policy designations (e.g. Countryside Character maps, English Nature Natural Areas, Biodiversity Action Plans (BAPs)?

3.28 Summary scores were awarded by consensus of the appraisal team in the range minus 5 to plus 5. The score for each criterion was based on whether, in the judgement of the appraisal team, the balance of the factors that contributed to that criterion was generally positive or negative, and to what degree. Strongly positive and strongly negative aspects within each criterion can combine to give a low positive or low negative or zero overall score. Therefore, a zero could represent neutrality or a combination of positive and negative aspects cancelling one another out. Appendix 3 provides statements of the extremes that would constitute a highly positive or negative answer for each of these questions, although in practice, most agreements were assessed to lie somewhere in-between.

3.29 The final assessment of each appraisal was *additionality*, which identifies the benefits gained from an individual agreement over and above those specified in the Scheme. No specific evaluative questions or a scoring framework exist for this criterion, but an appropriate commentary was added. Additionality was difficult to quantify in monetary terms with any meaning, although it did have some bearing on 'value for money'.

3.30 Additionality was assessed by considering the answers to three distinct but related factors:

- actions in the absence of the Scheme;
- likely impact of the Scheme on the environmental value of the holding (damage, maintenance or enhancement);
- extra public benefit accrued beyond that anticipated through the Scheme.

3.31 The consequence of this approach means that additionality under one factor may have been high but low under one or both of the other two. Since this was a multi-factor evaluation, and all factors would not apply in every case, the overall calculation of high, medium or low additionality was dependent on the combination of those factors present. Where they occurred, each of these three factors was considered and the findings summarised in the cover sheet (a single sheet summarising the scores

and comments) for each of the sample sites.

Management plan report

3.32 As part of this study an evaluation was carried out of management plans to evaluate their role in, and contribution to, the Scheme. Management plans are produced by independent consultants, either specifically for a CSS application or as an environmental assessment of a whole holding. The plans outline management regimes that can be employed to maintain or enhance the environment.

Sample design and data collection

3.33 The evaluation sampled data from two sources:

- a brief examination as part of the full appraisal process of all 202 agreements that should have included a management plan, drawn from the 484 agreements covered in the monitoring and evaluation of CSS, together with
- a detailed examination of a random sub-sample of 54 of those 202 agreements, which actually contained a management plan.

The latter comprised 46 agreements where a plan was a mandatory requirement under the Scheme, as well as 8 discretionary plans.

3.34 The brief examination noted whether a management plan was present and reviewed any relevant comments made during the appraisal process on the scope, content or appropriateness of the management plan.

3.35 The detailed evaluation involved a desk study examination of the management plan document itself and a review of the process relating to the development of management plans. It also included a comparison of appraisal scores for the sample with other agreements without management plans.

Assessment Criteria

3.36 In order to assess the contribution of management plans to the Scheme, the following issues were addressed:

The administrative process

- Are management plans being prepared for agreements which need them;
- Are the CSS guidelines being correctly implemented;
- Are these guidelines appropriate in relation to the objectives of the management plans;
- Documentation i.e. how in practice management plans are structured and written up;
- Timing and availability of the management plan document.

Quality

- What is the quality of the management plans produced;
- Can they be improved.

Environmental effectiveness

- Do management plans contribute to the overall aims of the CSS by producing better, more effective agreements.

The evaluation of management plans

3.37 A desk study of the file records for the sample of agreement sites was undertaken focusing on the following questions:

- Was the preparation of a management plan a mandatory requirement under CSS, and if so did it have one?
- When was the management plan produced: before a CSS application, to accompany the CSS application or after submission of the application?
- Was the management plan paid for under the agreement?
- Did the agreement refer to the management plan?

Quality assessment

3.38 The quality assessment undertaken was based on whether the management plan included the following elements:

- aims or objectives;
- the background context to the site e.g. statutory designations, surrounding land uses, the wider landscape, together with an evaluation of its importance;
- survey information on the existing condition of the site including landscape, ecology and historical features;
- a pro-forma work programme including description and timing of the proposed works;
- a clear map referring back to the work programme;
- a check against the full appraisal summary sheet for the agreement. This was important since it would not be possible from the file alone to ascertain whether any significant issues or features of the site had been missed or were not included in the management plan.

3.39 These criteria are based on those included in the PO Operating Instructions, and the applicants advisory pack. The plans were subsequently given overall assessments as excellent, good, satisfactory, poor or very poor, using these criteria.

Comparison of appraisal scores

3.40 To complement the evaluation, appraisal scores given to each sample agreement for environmental effectiveness and compliance were compared with other agreements without management plans. Environmental effectiveness and compliance alone were used in this analysis in an attempt to reflect the role of management plans in improving the effectiveness of the agreement, and in enabling the agreement holder fully to complete the work involved.

Special project report

3.41 An evaluation was carried out of special projects, with the objective of assessing their role in, and contribution to, the Scheme. Special projects are designed to fund work which falls outside the scope of CSS guidelines and standard payments, but which is deemed to bring particular environmental benefits.

Sample design and data collection

3.42 The evaluation examined both special projects shown on the MAFF special project database and those occurring in the main sample for the larger environmental evaluation of CSS.

3.43 The evaluation used two main data sources. These were:

- The MAFF special projects database. This was used to identify the full range of special projects agreed, and their geographical distribution.
- Detailed information on individual special projects taken from the sample of 484 agreements evaluated under the full monitoring project. This included 120 special projects occurring on 98 individual agreements. Data was collected from the agreement document, the field survey of agreement holdings, the desk study information and the agreement holder interview.

The evaluation

3.44 This information was used to evaluate the following:

The administrative process

- the existence and scope of a special project;
- the administrative process of setting up the special project;
- how a special project was documented in the agreement;
- the appropriateness of work carried out in special projects;

Quality/ease of implementation

- whether the details and specifications for each special project were clear;
- the role of the management plan in a special project;
- whether the skills were available to complete the work required;

Effectiveness

- whether special projects helped to achieve agreement objectives;
- whether special projects led to environmental benefit;

Additionality

- whether any of the work carried out under a special project would have been completed in the absence of the Scheme.

Scoring system report

3.45 The principal aim of this study was to determine the strengths and weaknesses of the scoring system according to its own objectives. A secondary aim was to assess the efficiency and effectiveness of the scoring system. The scoring system has been developed in order to provide an objective framework for evaluating applications in the context of the scheme objectives (see paragraph 2.2). Since the number of applications received in any one year exceeds the monies available, it is the scoring system that enables POs to prioritise those agreements that best meet the scheme objectives. The system has two distinct stages, an Initial Assessment based on a desk assessment of the application, and a Full Assessment that is carried out after a site visit and detailed negotiation.

Sample design and data collection

3.46 The analysis was based on 21 case studies of 1998 agreements which were selected from the four landscape types assessed under Module 1 in year three of the monitoring and evaluation project. The landscape types were: Arable Margins, Field Boundaries, Old Meadows and Pastures and Old Orchards. The agreements were selected using the following parameters:

- file details including the breakdown scores and documentation relating to the Initial and Full Assessments were available;
- at least two cases from all nine RSCs;
- one case per PO interviewed.

3.47 The rationale for selecting the sample was as follows:

- the appraisal session or desk study identified a potential 'issue' concerning that case e.g. more than one score was recorded in the file;
- there was a variation between the Initial and Full Assessments e.g. one appeared low and the other relatively high in comparison; and
- agreements with comparable Initial and Full Assessment scores to provide a control sample.

3.48 The core data were gathered in 21 telephone interviews with the POs who had been involved with each of the selected cases. POs were questioned about their understanding of the site and their reasoning for the allocation of scores in both stages of the system. The interview included questions relating to a specific site as well as general questions covering the PO's perceptions of the scoring system and how it operated in 1998 and suggestions for change. The issues raised were then compared against the 1999 scoring system to see if the new system has eradicated or retained these points.

3.49 The interviewer and PO independently prepared for the interview by examining the file for each selected case in order to familiarise themselves with the issues. Important documents used in this preparation included:

- the application and supporting information;
- the Initial Assessment Proforma;

- responses concerning consultation;
- management plans;
- site visit notes;
- the Full Assessment Proforma; and
- the signed agreement.

3.50 The methodology was not designed to be statistically representative but to enable a qualitative and in-depth analysis of the scoring system. For example, it permitted consideration of areas where the scoring system was particularly 'hard' (inflexible) or 'soft' (flexible) and the impact of this on the overall score. For this reason, individual cases were studied in detail and discussed with the PO concerned. In this way, the effectiveness of the scoring system in delivering appropriate agreements and its overall efficiency can be assessed. This contrasts with, and therefore complements the *Economic Evaluation of Countryside Stewardship* [4](Crabb *et al* 2000), which undertook a thorough quantitative analysis of Initial and Full Assessment scores for both successful and unsuccessful applications. The basis of this analysis was to appraise the potential of the scoring system to assist economic choice within the Scheme.

The evaluation

3.51 Given the importance of the scoring system in determining how the Scheme budget is allocated, it was important to assess the extent to which the system is delivering the following:

- agreements which meet the objectives of the Scheme;
- agreements which meet national and local targets;
- sites which offer the greatest potential benefit for enhancement;
- targeting of resources to those agreements which offer the best value for money; and
- consistency across and within regions.

3.52 Particular attention was paid to characteristics associated with applications that might have led to difficulties within the scoring process. These may have related to :

- the size of the proposed agreement land;
- the quality of the land (presence or absence of environmental designation and agency support);
- the level of environmental knowledge and resources (labour and financial) of the agreement holder;
- the type and complexity of proposed management;
- the implications of the scoring system for certain landscape types and target

[4] Crabb J, Short C, Temple M, Augustin B, Dauven A and Winter M (2000) *Economic Evaluation of Countryside Stewardship Final Report* ADAS/CCRU report to MAFF, London.

areas.

3.53 The scoring system has two distinct stages. First, applications are scored in order to determine if and when they receive a site visit. A number of aspects of the Initial Assessment therefore needed to be assessed:

- did decisions not to visit a site, based on a desk assessment of the application, result in potentially good schemes being rejected/deferred;
- did poor presentation affect the Initial Assessment of an application;
- was the Initial Assessment effective in identifying potentially good sites and applications;
- was there an issue and subsequent implications of consistency between POs in the implementation of the scoring system.

3.54 Following a site visit, usually undertaken by the same PO who completed the Initial Assessment, a draft agreement is prepared. It is this draft agreement that is scored in the second stage of the system, the Full Assessment. In respect of the Full Assessment it was necessary to assess:

- whether the scoring system was able to reflect the environmental value of a site;
- how a site related to the Scheme objectives at a national, regional and local level;
- the extent to which the site contributed to national commitments, such as BAPs;
- how highly specialised but important sites scored, even though they may have only fulfilled a narrow range of Scheme objectives;
- the issue and implications of consistency between POs in the implementation of the scoring system.

Module 2

3.55 The overall objective of this module was to assess the ecological quality of a sample of land under agreement in terms of vegetation characteristics and the Habitats as listed within the UK Biodiversity Action Plan. The detailed objectives were to:

- obtain national estimates of the extent of Biodiversity Action Plan (BAP) Broad and Priority Habitats under CSS Agreements;
- obtain national estimates of vegetation character, and hence ecological quality of all agreement land;
- obtain national estimates of vegetation character, and hence the ecological quality, of BAP Priority Habitats on Agreement land;
- analyse the distribution of areas and vegetation characteristics of agreement land (with special reference to Priority Habitats) with regard to geographic location, agreement age and type, and other factors as appropriate; and
- establish a baseline for the future evaluation of changes in ecological quality.

3.56 The assessment of ecological quality was essentially comparative in nature. If for example the targeting of land of high ecological quality or indeed low ecological quality were an objective of the Scheme, then there should be measurable differences between agreement land and land in the wider countryside. The trends in ecological quality through time can only show whether the Scheme has added ecological value if they are considered relative to trends in the wider countryside.

3.57 The method was based upon an unstratified random survey of all agreements in force at the end of 1997, excepting boundary-only agreements. A total of 451 agreements were surveyed, 8.7 % of the total, and accounting for 8894 ha, 7.2 % of the total. At each site, only land within the agreement was surveyed. Surveys took place during 1998 and 1999.

3.58 The land was mapped using UK Biodiversity Action Plan Broad and Priority Habitats. Broad Habitats were mapped using a vegetation key and Priority Habitats on the basis of expert knowledge and the definitions available at the time of the start of the survey (largely the same as those that were finalised at the time of writing this report). The "Improved grassland" Broad Habitat was subdivided for this survey into "Highly improved grassland", "Semi-improved/improved grassland" and "Sown light grass mixtures". All land with a field margin management code was recorded as a Cereal Margin Priority Habitat; as all fell within the defined Cereal Field Margin Priority Habitat even when cereals were not present. Mosaics were also identified. This information was digitised for analysis using Arc-View.

3.59 A random 200 m^2 vegetation quadrat was recorded within each agreement using Countryside Survey methods. In addition, a quadrat was recorded in every Priority Habitat present at the site, excluding any that had been recorded by the random quadrat. The quadrat positions were mapped and marked in the field to allow precise relocation. Each quadrat was classified in terms of National Vegetation Classification (NVC) and Countryside Vegetation System (CVS); species number and presence of rare and scarce species were also quantified. The quadrats were co-located with the spatial data in the database.

3.60 In addition, a variety of observations were taken (e.g. photographs and target notes on rare species and/or weed infestations) to aid interpretation of future surveys. These data have not been entered digitally, but have been archived.

RESULTS OF THE MONITORING PROGRAMME

4.1 Within each individual landscape topic report, the results of the evaluation and appraisal process were presented as a series of tables, charts and accompanying commentaries relating to each of the five appraisal criteria and additionality. In this chapter data are aggregated for the whole sample and presented as a similar series of tables, charts and commentaries. Summaries of the results of the special topic reports on Management Plans, Special Projects and the Scoring System are also presented.

Landscape topic reports - results of the evaluation process

Characteristics of the whole sample

4.2 The distribution of the agreements sampled for each lead landscape type is shown in Appendix 2. The aim was to sample agreements that were only one year old. Each lead landscape sample is representative of the lead landscape type as a whole in the years that they were taken e.g. the upland sample represents the upland agreements of 1996 and the orchard sample represents the orchard agreements of 1998. There were three exceptions, the Countryside Around Towns sample included agreements dating from 1991 to 1996, Historic Parklands from 1993 to 1997, and the Coastal sample included agreements from 1997 and 1996. This was because there were insufficient agreements signed in the year of assessment.

4.3 Throughout the results section abbreviations from figures 1.1 / 2.1 are used for the 12 lead landscape types, and they are ordered by the year in which they were evaluated.

Management items

4.4 Excluding capital items (80%), field boundary management was the most commonly encountered management in the sample over the period 1996-98 (Table 4.1). Managing grassland was the next most common management type (71%). Managing sand dunes and salt marshes were rare management items, as was managing upland moors (1%). Given the importance of the moorland landscape and habitat in upland England, the scarcity of agreements for managing upland moors was difficult to explain.

Table 4.1 – The management undertaken in the sample of agreements.

	Percentage of Agreements													
CSS Management Items	E	T	U	W	C	G	H	P*	A	B	M	O	Number of Agreements	
Managing grassland	0	56	91	83	65	86	28	95	22	42	98	52	295	62%
Managing Fens, Reedbeds and Carrs	0	3	0	17	9	0	0	3	0	0	2	3	14	3%
Managing Sand Dunes	0	0	0	0	6	0	0	0	0	0	0	0	2	0%
Managing Salt-marshes	0	0	0	5	12	0	0	0	0	0	0	0	6	1%
Re-creating Grassland on Cultivated Land	17	6	0	19	21	18	16	33	18	9	15	9	72	15%
Managing Lowland Heath	0	3	7	5	3	2	84	0	2	0	0	0	36	8%
Managing Upland Moorland	0	0	7	0	0	2	0	3	0	0	0	0	5	1%
Managing Historic Landscapes	14	9	0	5	3	2	0	8	6	12	13	100	61	13%
Managing Arable field Margins	23	0	0	12	26	10	6	3	98	24	19	24	105	22%
Field Boundaries	94	59	89	79	56	82	41	56	76	94	92	91	365	77%
Access Provision	97	13	11	43	24	20	3	31	12	9	10	12	110	23%
Capital Items	94	59	80	81	71	82	84	77	69	76	88	100	380	80%
Special Projects: revenue	0	0	0	2	29	2	0	0	6	0	2	21	23	5%
Special Projects: capital	9	0	9	12	15	8	13	51	6	18	17	18	68	14%
Total Agreements	35	32	46	42	34	50	32	39	51	33	48	33	475	100%

*Nine parkland agreements were for restoration plans only.

Designations

4.5 Almost two thirds of the sample had some form of designation on or within the agreement land (Table 4.2). Land in agreement was found in AONBs and Heritage Coasts for 29 % of the sample and 24% of the sample had nationally or internationally important wildlife designations. Of the 11 agreements within ESAs, the four parkland agreements dated from before the ESA was designated. The others were cases where the management undertaken was outside the scope of the ESA.

Table 4.2 – The designations found on agreements within the sample

	Percentage of Agreements													
Designation	E	T	U	W	C	G	H	P	A	B	M	O	Number of Agreements	
Wildlife														
National/International interest	17	13	35	33	50	24	47	19	14	3	23	12	116	24%
Local interest	17	38	0	12	12	4	9	2	0	6	10	0	40	8%
Landscape														
National Park	6	0	28	7	0	30	0	2	2	6	6	0	40	8%
AONB and Heritage Coast	20	0	24	26	71	26	47	25	31	24	31	30	142	29%
ESA	0	0	0	5	0	0	0	8	8	0	0	3	11	2%
Historical/Archaeological														
Scheduled Ancient Monument	9	13	15	12	9	12	25	23	10	6	8	3	59	12%
Parks and Gardens Register	0	0	0	0	0	0	0	54	0	0	0	0	26	5%
Other														
Community Forest	0	66	0	5	0	0	0	0	0	0	0	0	23	5%
No environmental designation	31	19	30	36	6	28	34	25	53	64	44	52	171	35%
Total Number of Agreements	35	32	46	42	34	50	32	48	51	33	48	33	484	100%

Agreement holder profile

4.6 The majority (68%) of agreement holders within the sample were agricultural and most of these were owner-occupiers rather than tenants (Table 4.3). Almost a third (32%) of agreement holders were non-agricultural in background. Similar proportions of voluntary bodies, local authorities and other non-agricultural agreement holders comprised this group. Other non-agricultural agreement holders included a variety of individuals, from hobby / lifestyle and retired farmers, to those employed in a variety of non-agricultural businesses. In many of these cases, the land under agreement was managed for agricultural purposes, for example, with graziers responsible for day-to-day management of the land.

Table 4.3 – Type of agreement holder

	Percentage of Agreements												
Type of agreement holder	E	T	U	W	C	G	H	P	A	B	M	O	Average
Agricultural:													
Owner occupier	64	34	59	62	21	65	25	29	54	53	58	62	49
Tenant	19	9	26	17	21	17	6	8	42	28	15	19	19
Non agricultural:													
Voluntary body	0	13	2	5	43	6	16	36	0	3	6	0	11
Local Authority	3	35	0	9	3	0	31	4	0	3	8	0	8
Other non agricultural	14	9	13	7	12	12	22	23	4	13	13	19	13
Total	100	100	100	100	100	100	100	100	100	100	100	100	100

4.7 The lead landscape types could be split into two broad groups based on the background of the agreement holders (Table 4.3). The first group contained agreement holders that were predominantly from an agricultural background (A, U, E, G, B, O, W & M) and the second group were mostly non-agricultural (H, P, C & T).

Attitudes of agreement holders to the Scheme

4.8 Attitudes of agreement holders towards the Scheme appeared to fall into four types. The first group was made up of voluntary bodies and local authorities who viewed the Scheme as a means of implementing and formalising good environmental intentions. Although classified as 'non-agricultural', they usually had the expertise to manage the site appropriately and were considered likely to fulfil their obligations under the Scheme. They were, however, often reliant on tenant farmers or volunteer labour to implement the work required. Financial constraints were also identified as significant at times for this group.

4.9 The second group comprised full time, commercial landowners and farmers who enter the Scheme because of an interest in conservation and the environment (and as such may already manage their land sensitively). They view the Scheme in a positive manner and intend to comply, and typically have the skills and resources to enable them to do so. That some of this group are already practising traditional land management, may also facilitate their compliance.

4.10 The third group contained a much smaller number of commercial farmers who viewed the Scheme purely in economic terms, both agriculturally and financially, and any agreement had to complement their existing farming system. Potentially, financial concerns could have directed these agreement holders' attentions away from compliance, however initially supportive or technically competent they might have been, but this research found no evidence of that having happened.

4.11 The fourth group was made up of non-farmers who were principally interested in improving the land environmentally and were keen to comply. However, in some instances, they lacked the technical knowledge, labour and/or livestock necessary to carry out the work required, possibly affecting compliance with the agreement.

Results of the appraisal

Agreement Negotiation

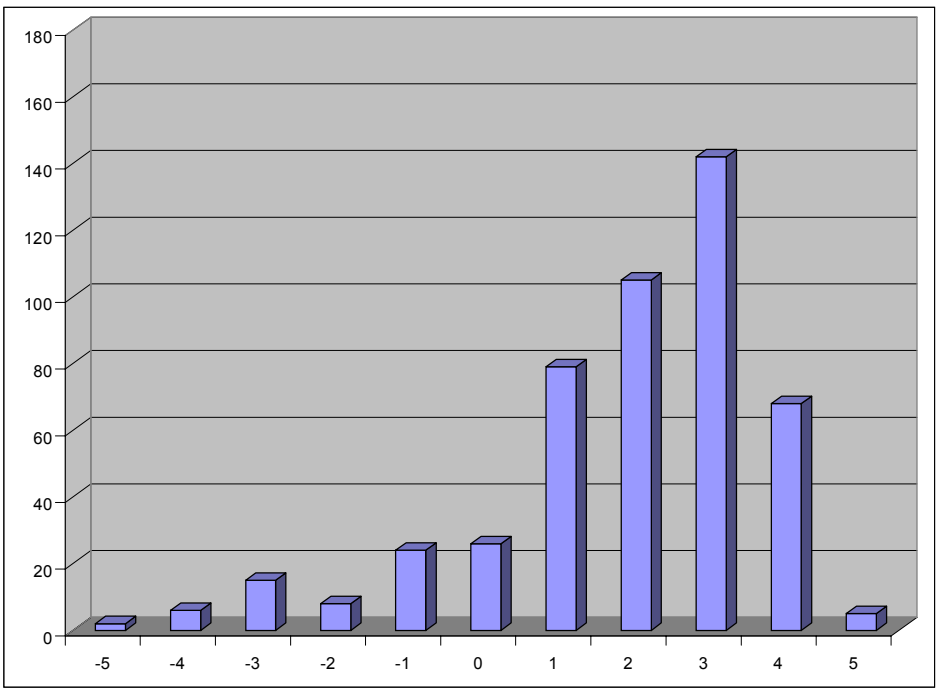
4.12 Generally, an agreement scored highly in terms of agreement negotiation where:

- a strong lead had been taken by the PO;

- the scores were appropriate;
- information had been gathered or received from a number of sources, possibly including a management plan;
- full consultation had been undertaken;
- advice given was thorough and rated highly by the applicant; and
- there were no missed opportunities.

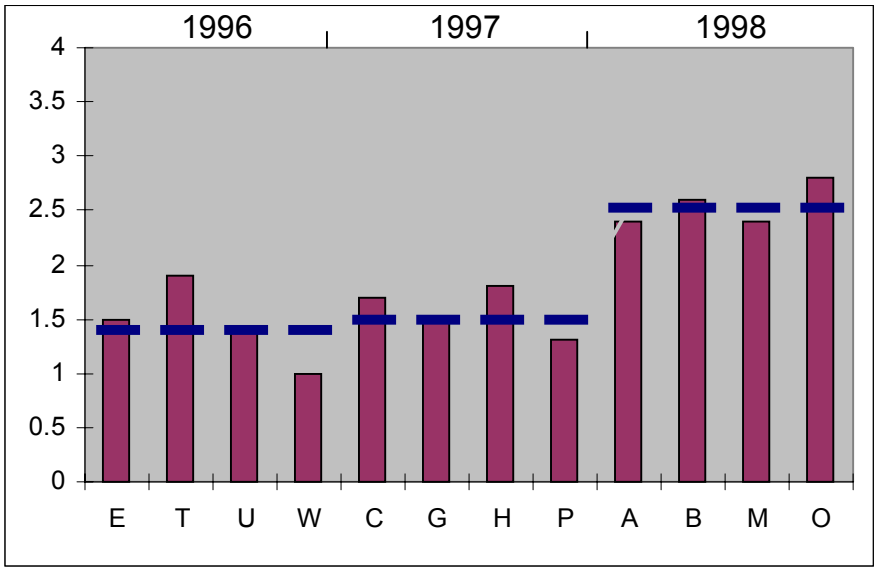
4.13 The range and distribution of the appraisal scores for agreement negotiation are shown in Figure 4.1 and are combined for all lead landscape types. The scores range from –5 to +5, with a modal score of 3, a mean score of 1.86 and a standard deviation of 1.86. The large standard deviation demonstrates that there was a large variation in the scores given for agreement negotiation and indicates that there was inconsistency in the negotiation phase of the agreement process throughout the three years.

Figure 4.1 - Number of agreements with each of the appraisal scores for negotiation



4.14 The variation in agreement negotiation scores was statistically significant between lead landscape types (Figure 4.2 and Appendix 4, Table A4.1). Negotiation was best for the Orchard agreements and worst for the Waterside agreements. In Waterside agreements 26% had negative scores compared to only 9% of Orchard agreements. The mean annual difference between lead landscape types is probably explained by improvements in negotiation over the period 1996-98. The scores for agreement negotiation improved significantly over the period 1996-98 (Figure 4.2) and especially for 1998 agreements. There were differences between the scores for agreement negotiation between the different Regional Service Centres but they were not significant.

Figure 4.2 – Mean appraisal scores for negotiation for each of the lead landscape types (columns) and years (dashes).



4.15 One of the main influences on the score for agreement negotiation was the degree to which POs consulted partners about agreement applications. There was some form of consultation in a large majority (89%) of cases (Table 4.4). The County Archaeologist was consulted on 62% of occasions, but this was well below expectation as POs are expected to consult in every case. English Nature (EN) was consulted for 24% of agreements but this figure would be expected to be nearer to 33%. This group contained most, but not all, of the 24% of agreements (Table 4.2) that had national/international wildlife designations. On all such sites, EN should be involved in the consultation but this was not always the case as identified in the individual topic reports. Consultations involving EN also occurred on important local sites with no national/international wildlife designation. If those consultations that EN should have been involved in were added to those that they wanted to be involved in then about a third of agreements would involve consultation with EN. Consultations were more frequent in 1998 (A, B, M, O) than in previous years. Lack of consultation with any of the above bodies was most noticeable for the Countryside Around Towns (T) and the Historic Landscapes (Parklands) (P) lead landscape types, although the reasons for this are not clear.

Table 4.4 – Type and number of consultations made by Project Officers

	Percentage of Agreements													
Consultee/Partner	E	T	U	W	C	G	H	P	A	B	M	O	Number of Agreements	
Wildlife:														
English Nature	14	6	20	29	44	30	47	17	10	12	29	39	117	24%
FWAG*	40	3	7	26	3	20	13	6	47	30	27	42	108	22%
County Ecologist	0	0	2	0	0	10	9	0	8	9	0	0	16	3%
RSPB/WT*	20	13	2	12	53	16	31	6	6	6	25	21	80	17%
Landscape:														
LA/NP	17	22	28	10	15	40	25	10	14	21	19	27	100	21%
Historic:														
County Archaeologist	63	50	41	45	24	62	66	42	82	85	83	100	299	62%
English Heritage	6	13	15	2	0	2	9	33	8	12	6	9	48	10%
Other:													0	0%
Environment Agency	11	16	7	24	18	0	16	10	20	6	17	21	65	13%
Private Consultant	9	0	4	0	9	6	6	35	8	33	2	9	49	10%
Other	31	28	0	0	0	0	0	10	14	0	15	15	44	9%
Total Agreements with consultation	91	75	83	83	88	92	94	79	96	100	92	100	432	89%
Total Agreements with no consultation	9	25	17	17	12	8	6	21	4	0	8	0	52	11%
Total number of Agreements in sample	35	32	46	42	34	50	32	48	51	33	48	33	484	100%

WT = Wildlife Trust LA/NP = Local Authority/National Park

* - It may be that in some cases FWAG and RSPB /WT were acting as partners rather than strictly as consultees, providing advice on the application.

4.16 Under agreement negotiation, missed opportunities were also assessed. Appendix 5 shows diagrammatically how missed opportunities were identified. Missed opportunities influenced the appraisal scores for agreement negotiation. In total, 68% of all agreements had at least one missed opportunity (Table 4.5). The missed opportunities varied from very minor issues to very important ones, such as veteran trees not individually protected in historic parklands (cross compliance cannot fully protect the trees as they are not individually mapped or identified in the agreement and their subsequent condition or disappearance cannot be monitored as a result) . Missed landscape opportunities were most numerous (37%), with those for wildlife nearly as frequent (35%). There were missed historical opportunities in 25% of agreements while missed opportunities for access were noted in 18% of the sample.

Table 4.5 – Missed opportunities for all agreements

	Percentage of Agreements													
Missed Opportunities	E	T	U	W	C	G	H	P	A	B	M	O	Number of Agreements	
Missed wildlife opportunity	40	25	35	19	24	60	28	34	49	34	33	17	159	35%
Missed landscape opportunity	40	38	46	52	32	48	28	26	34	34	25	38	171	37%
Missed historical opportunity	40	25	28	14	9	34	25	34	23	14	27	24	116	25%
Missed access opportunity	11	44	26	7	24	20	13	14	23	10	8	21	84	18%
Total Agreements with missed opportunity	71	66	63	62	65	86	69	71	79	66	56	55	312	68%
Total Agreements with no missed opportunity	29	34	37	38	35	14	31	29	21	34	44	45	147	32%
Agreements assessed	35	32	46	42	34	50	32	35	47	29	48	29	459	100%
Agreements not assessed *	0	0	0	0	0	0	0	13	4	4	0	4	25	

* 9 P agreements were not assessed for missed opportunities as they were agreements for the production of restoration plans only. The remaining 16 agreements not assessed had other CSS agreements on the holding, so the appraisal team were unable to identify whether opportunities not included in the agreement under appraisal were included in the earlier agreements or not.

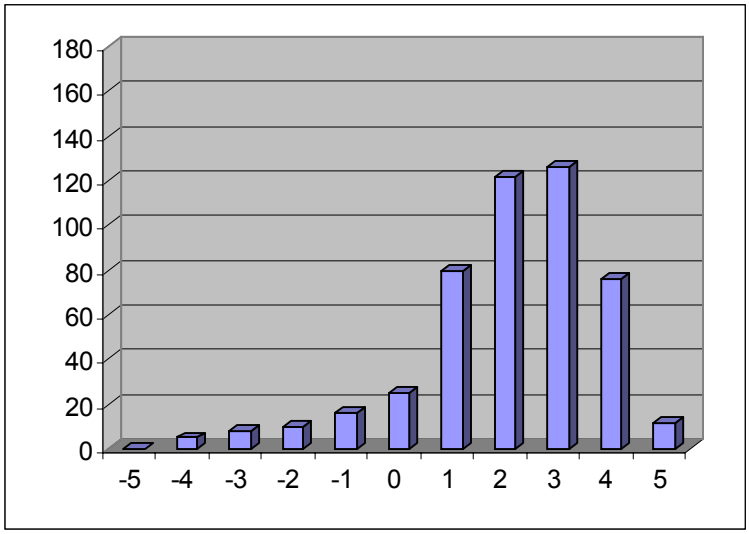
4.17 There were variations in the percentage of missed opportunities for different lead landscape types. The Calcareous Grasslands (G) lead landscape type stands out as having the highest percentage of wildlife and a high percentage of landscape missed opportunities. Parkland agreements (P) had a high percentage of historical missed opportunities, a particular concern given that this is a historic lead landscape type. Waterside (W) agreements had a very low percentage of missed opportunities for wildlife, historical interest and access but had the highest percentage of missed opportunities for landscape. Countryside Around Towns (T) had the highest percentage of missed opportunities for access, notable because the provision of new access is one of the main objectives of this lead landscape type.

Appropriateness

4.18 The scores for appropriateness are shown in Figure 4.3 for all lead landscape types. An agreement that scored highly in terms of this criterion was one where:

- good, clear appropriate and feasible objectives were listed;
- the objectives concurred with county and national targets;
- reference was made to other designations and schemes;
- management prescriptions were clear and appropriate.

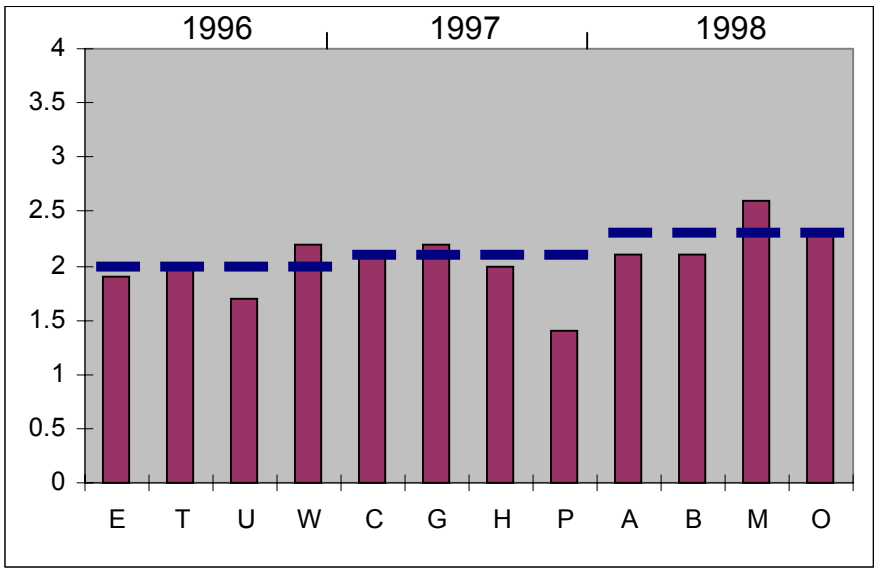
Figure 4.3 – The scores for appropriateness for all agreements



4.19 Scores for appropriateness, for agreements from all lead landscape types, ranged from -4 to +5, with a modal score of +3, a mean of +2.1 and a standard deviation of 1.7. The standard deviation for agreements indicates a degree of inconsistency in the appropriateness of agreements.

4.20 There were differences between lead landscape types with Old Meadows and Pastures having the highest appraisal scores for appropriateness and Historic Landscapes (parklands) the lowest (Figure 4.4). Agreements became more appropriate over the period 1996-1998. The graph excludes the Countryside around Towns and Parklands agreements that were signed before 1996 and 1997 respectively. The improvement in the mean was not as marked as for the agreement negotiation criterion and was insignificant (Table A4.1). There were differences between Regional Service Centres in the appropriateness of agreements. These differences were, however, insignificant (Table A4.1).

Figure 4.4 – Mean appraisal scores for appropriateness for each of the lead landscape types (columns) and years (dashes).



4.21 The presence or, more importantly, the absence of objectives in agreements had an influence on the score for appropriateness. The great majority (94%) of agreements had objectives for wildlife and landscape (Table 4.6). However, only 68% of agreements had historic objectives and 65% had access objectives. A small number of agreements (5%) had no objectives at all, including 25% of T and 17% of P agreements. Agreements with no objectives were more likely to score negatively in the appraisal.

Table 4.6 - Number of agreements with objectives by general type

	Percentage of Agreements													
Objectives	E	T	U	W	C	G	H	P	A	B	M	O	Number of Agreements	
Wildlife	97	69	96	93	100	98	97	79	100	100	100	100	456	94%
Landscape	97	69	98	88	100	98	97	81	96	100	100	100	454	94%
Historic	60	13	46	60	76	82	78	69	71	85	77	100	330	68%
Access	86	25	39	69	71	58	75	71	71	76	71	67	313	65%
No Objectives	3	25	0	7	0	2	3	17	0	0	0	0	22	5%
Total Agreements	35	32	46	42	34	50	32	48	51	33	48	33	484	100 %

Environmental Effectiveness

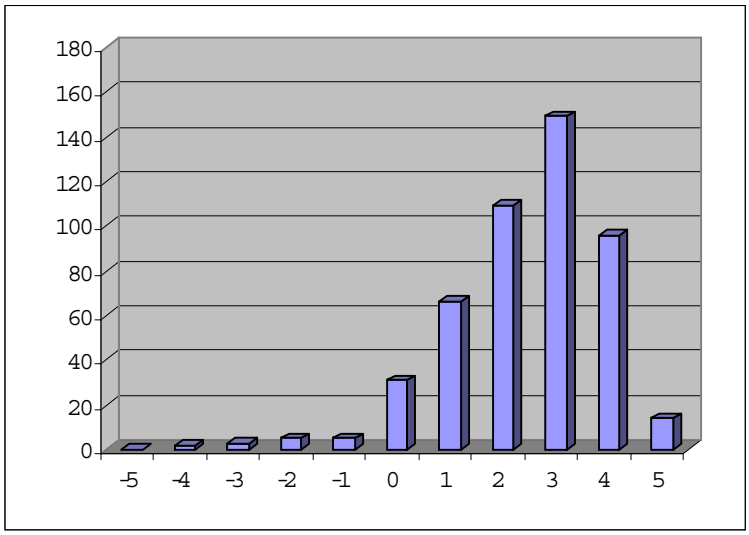
4.22 The scores for the environmental effectiveness expected to accrue from an agreement are shown below in Figure 4.5. An agreement scored highly according to this criterion if it was considered to be:

- effective to both maintain and enhance the wildlife of the site;
- effective to both maintain and enhance the landscape of the site;
- effective to both maintain and enhance the historic features of the site;
- effective to both maintain and enhance the access of the site;
- further enhanced by a management plan;
- further enhanced by a special project; and

- protecting and enhancing features of high or irreplaceable quality.

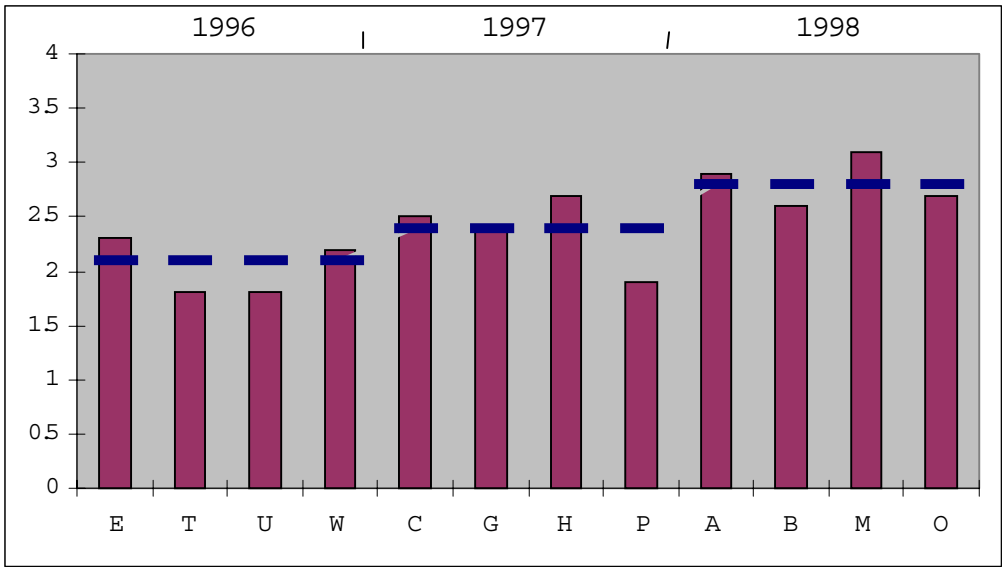
4.23 The scores for environmental effectiveness ranged from +5 to -4, with a modal score of +3, a mean of +2.4 and a standard deviation of 1.5. The standard deviation shows that agreements for all lead landscape types varied in their effectiveness.

Figure 4.5 – The number of agreements with each of the appraisal scores for environmental effectiveness



4.24 There was a statistically significant variation in the scores for environmental effectiveness between the lead landscape types (Figure 4.6, Table A4.1). Old Meadow and Pasture and Arable Margin agreements scored highly, and the Countryside around Towns and Upland agreements had the lowest scores. There was a steady and statistically significant increase in the scores for environmental effectiveness of agreements over the period 1996-1998 (Table A4.1).

Figure 4.6 – Mean appraisal scores for environmental effectiveness for each of the lead landscape types (columns) and years (dashes).



Compliance

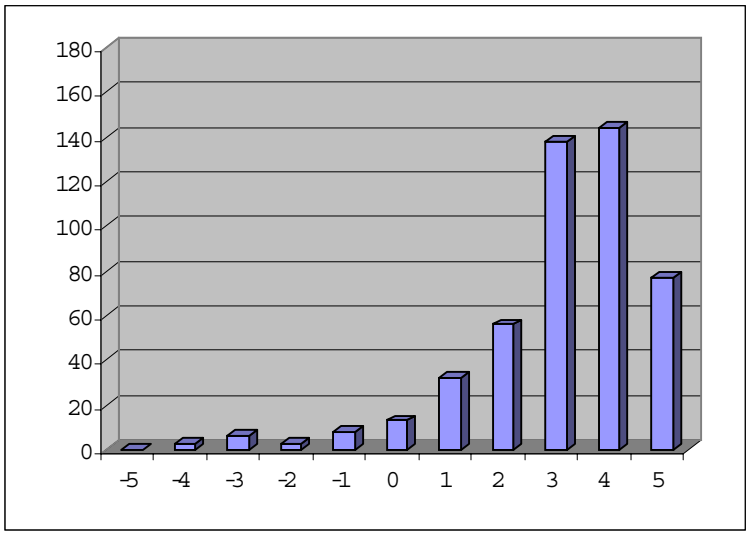
4.25 Most agreements were given a positive score for compliance. An agreement scored highly for this criterion if it was considered that:

- the agreement holder was fully committed to the work;
- the agreement holder's own objectives accorded with those of the Scheme;
- the agreement holder fully understood what was required;
- the agreement holder had technical competence to carry out the work (or ensure that the work was done competently by others);
- the financial resources necessary to complete the work were available;
- cross-compliance elements were clearly explained in the agreement; and
- cross-compliance elements were understood.

4.26 Scores for all agreements for compliance, are shown in Figure 4.7 below. They ranged from +5 to -4, with a modal score of +4, a mean of +3.1 and a standard deviation of 1.7. The mean score of +3.1 indicates that most agreement holders were likely to comply. The high standard deviation suggests an inconsistency amongst the agreement holders.

4.27 Whilst it is difficult to be sure of an applicant's financial status and technical competence in general, the appraisal team felt that, to attain as high a likelihood of compliance as possible, it was important that the agreement holder knew what he/she had been asked to do, and was content with it.

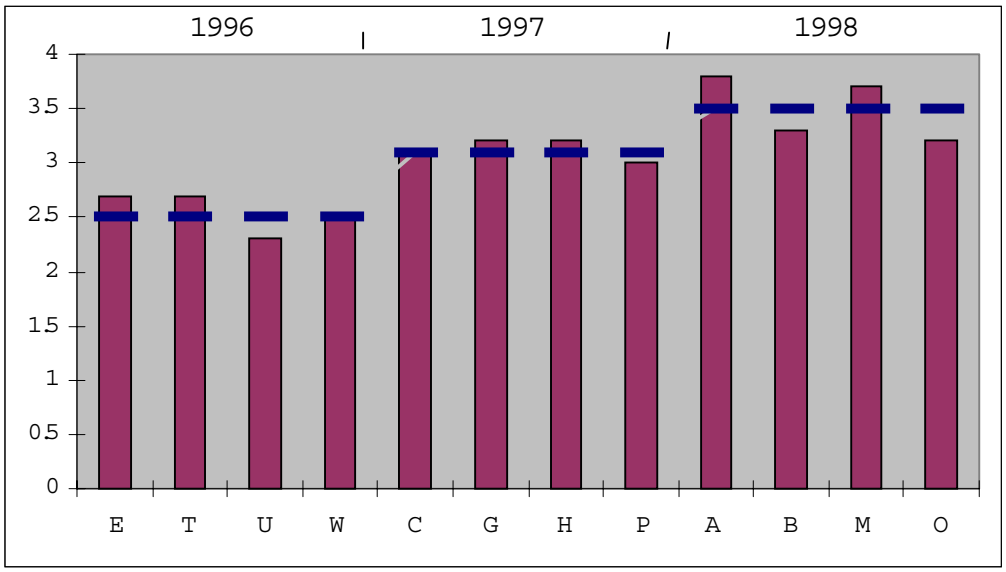
Figure 4.7 – The number of agreements with each of the appraisal scores for compliance



4.28 There were statistically significant differences between the lead landscape types regarding the level of compliance by agreement holders (Figure 4.8, Table A4.1). Arable Margin (A) and Old Meadow and Pasture (M) agreement holders were more likely to comply than Upland (U) and Waterside (W) agreement holders. The likelihood of compliance improved over time and is statistically significant (Figure 4.8, Table A4.1). There were differences between the scores for compliance for the

different RSCs but they were insignificant

Figure 4.8 – Mean appraisal scores for compliance for each of the lead landscape types (columns) and years (dashes).



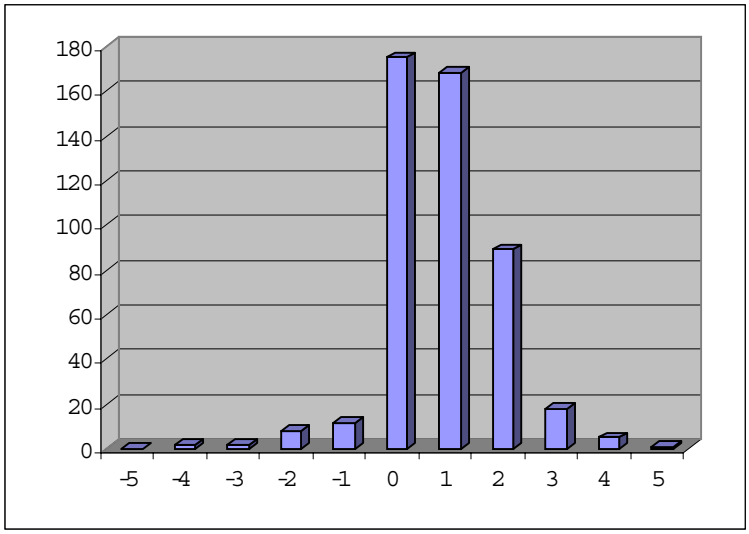
Side Effects

4.29 An agreement scored highly for this criterion if:

- there was the potential for an indirect environmental benefit;
- the impact on the rest of the holding was positive;
- the impact on adjacent land was positive;
- the agreement objectives related to other environmental policy designations.

4.30 Scores for side effects are shown in Figure 4.9 below, and ranged from -4 to +5, with a modal score of 0, a mean of +0.8 and a standard deviation of 1.1. The vast majority of agreements were judged to have no (0) or very few positive (+1) side effects.

Figure 4.9 – The number of agreements with each appraisal score for side effects.



4.31 There were no statistically significant differences in the side effects of agreements of different lead landscape types, but Waterside agreements scored higher for side effects than any of the other lead landscape types. Scores for side effects went down between 1996 and 1998 but this was statistically insignificant. There were differences between RSCs for side effects but these too were statistically insignificant (Table A4.1).

Additionality

4.32 Assessment of additionality was based upon three factors:

- a consideration of what agreement holders would have done in the absence of the Scheme;
- the perceived effect on the environmental value of the land on the holding (damaged, maintained, enhanced); and
- the extra public benefit likely to be accrued beyond that anticipated through the Scheme.

4.33 Agreements considered to have *high* additionality (36% of all agreements) were those where it was clear that none of the work under the Scheme would have been undertaken at all without the agreement. Also these agreement sites may have provided a high positive environmental improvement and were very visible and accessible to the public.

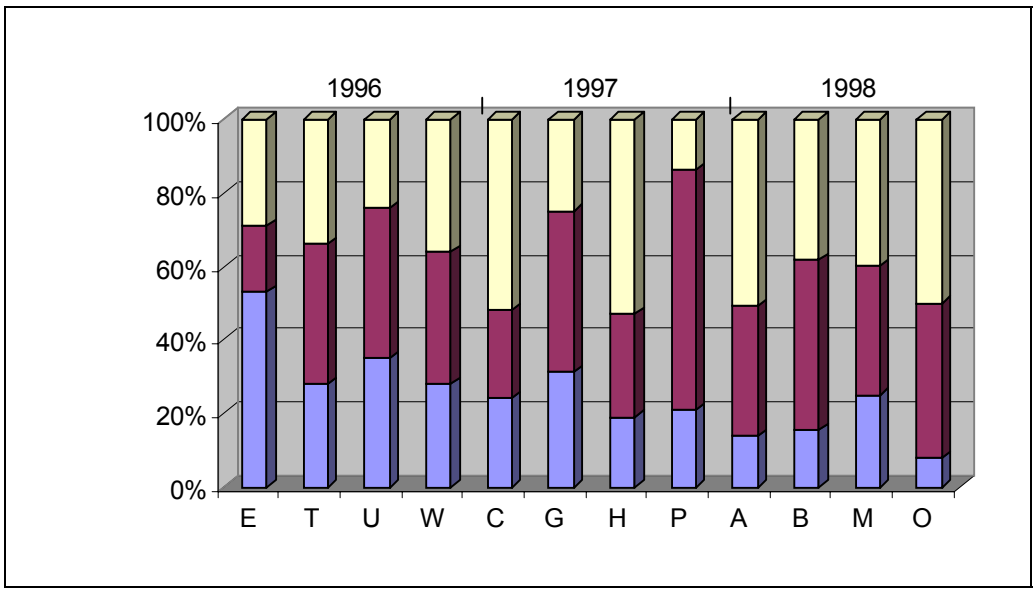
4.34 *Medium* additionality (38%) applied to cases where some work consistent with the agreement would have taken place anyway, but not to the same scale or standard. In some cases, these agreements prevented environmental damage occurring, maintained existing features and provided reasonable public access and visibility.

4.35 *Low* additionality was considered likely for 24% of agreements. These were cases where the majority of the work undertaken within the agreement would have been carried out in the absence of the Scheme and public access may have been poor. Some additionality may still have been noted, however, since without the Scheme, the work would have taken place over a longer timescale because of a lack of resources,

encouragement or guidance. It might also not have been done to such a high standard.

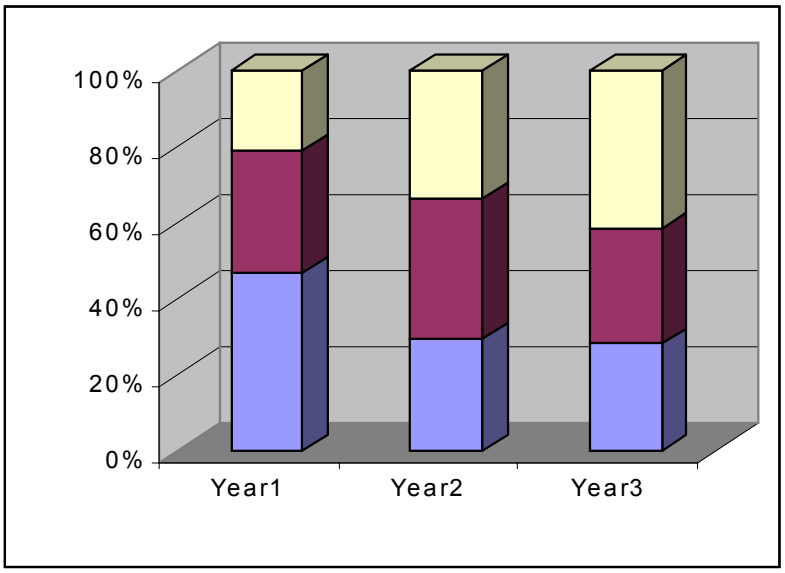
4.36 There were differences in the additionality provided by different lead landscape types (Figure 4.10). Coastal, Lowland Heath, Arable Margin and Orchard agreements gave the most additionality, whereas Educational Access agreements had the greatest number of agreements giving low additionality. Historic Landscapes (Parklands) stand out because of the large number of agreements expected to give medium additionality.

Figure 4.10 - The proportion of high (white), medium (dark) and low (light) additionality of agreements for each lead landscape type.



4.37 The additionality from agreements increased over the period 1996-1998 (Figure 4.11). Many more agreements were judged to deliver high additionality in 1998 than in 1996. The percentage of agreements giving medium additionality increased from 1996-97 and fell from 1997-98 whilst the number of agreements delivering low additionality fell each year.

Figure 4.11 – The proportion of agreements with high (white), medium (dark grey) and low (light grey) additionality over the period 1996-98



Analysis of all Criteria

4.38 A Principal Component Analysis (PCA) (described in Appendix 4) of all five first generation criteria (negotiation, appropriateness, environmental effectiveness, compliance and side-effects) indicated that agreements scored more than adequately (+2) for all criteria and came close to scoring very well (+3). The analysis showed that a few (<10) very poor agreements had a very large influence on the mean score and, therefore, it was these very poor agreements that prevented the Scheme reaching the +3 performance level.

Results of the Management Plan report

4.39 Of agreements for which management plans were mandatory, 75% had management plans on file. Of these "missing" management plans some may have been produced, but were not held on the file examined by the appraisal team. Others may have been in the process of being produced.

4.40 The analysis sought to find out if the management plan was produced before a CSS application, to accompany the CSS application or after submission of the application.

4.41 Of management plans available for evaluation, 74% had been prepared at the same time as the application and 17% had been prepared previously, often by conservation bodies or local authorities, and perhaps for their own management purposes before a CSS application was considered. The 9% of plans prepared post-application may be an underestimate, as it does not take account of plans to be produced (but not yet available) at the time of the evaluation (Table 4.7).

Table 4.7 Timing of management plan production

Management Plan Type	No. of Agreements	Pre-Application	With Application	Post-Application
Lowland heath	8	2	5	1
Orchards	11	0	11	0
Historic parks	6	3	3	0
Traditional buildings	2	0	0	2
Scrub management	11	2	7	2
Special projects revenue	4	0	4	0
Special projects capital	0	0	0	0
Discretionary	8	1	7	0
Whole farm MPs	4	1	3	0
Total	**54 (100%)**	**9 (17%)**	**40 (74%)**	**5 (9%)**

4.42 A high proportion (67%) of the 54 management plans examined in detail were scheduled to be paid for under the Scheme, as indicated in Schedule 4 of the agreement document. In a further 18 agreements where a management plan was not available on file, there were nine cases where a payment was scheduled.

4.43 A total of 78% of agreements specifically refer to the management plan and state that the agreement holder must comply with it.

4.44 The overall standard of management plans was variable in terms of the criteria detailed in the methodology (Table 4.8). Of the 54 management plans assessed, 63% were classified as satisfactory or better, of which 34% were assessed as excellent or good. At the lower end of the scale, 37% were unsatisfactory. These were characterised by a lack of information and clarity, and were not expected to make a contribution to the environmental effectiveness of the agreement.

Table 4.8 General assessment of management plan quality

Management Plan Type	No. of Agreements	Excellent	Good	Satisfactory	Poor	Very Poor
Lowland heath	8	1	2	4	1	0
Orchards	11	0	5	3	1	2
Historic parks	6	2	0	2	2	0
Traditional buildings	2	0	0	0	1	1
Scrub management	11	0	4	4	2	1
Special projects revenue	4	0	0	0	3	1
Special projects capital	0	0	0	0	0	0
Discretionary	8	0	2	3	2	1
Whole farm MPs	4	0	2	0	2	0
Total	**54**	**3 (6%)**	**15 (28%)**	**16 (29%)**	**14 (26%)**	**6 (11%)**

4.45 Comparison of appraisal scores for environmental effectiveness showed a mean score of 3.26 for agreements with management plans, compared to 2.44 for those without.

4.46 Comparison of appraisal scores for compliance showed a mean score of 2.85 for agreements with management plans compared to 1.31 for those without.

Special project report

Characteristics of special projects.

4.47 Of the 484 agreements in the sample, 98 agreements featured 120 special projects. Twenty-two of these were Special Projects - Revenue (SPR) and 98 were Special Projects - Capital (SPC). Three agreements had both SPRs and SPCs. Sixteen agreements had more than one SPC.

4.48 Tables 4.9 and 4.10 illustrate the types of special projects being undertaken in the sample. In particular they show that SPRs are focused on ecological improvements, while the numbers of SPCs are more or less evenly spread across the four environmental aspects of the Scheme.

Table 4.9 Sample of Revenue Special Projects by environmental interest

Primary Interest	**SPR type**	**Number**	**%**
Wildlife	*Target area SPRs*		
	Avalon Marshes	0	
	Isles of Scilly (excluded from sample)	0	
	Cirl Bunting	19	
	Stone Curlew	1	
	Subtotal	*20*	*91%*
	Other SPRs		
	Grass margins	1	
	Grazing management	1	
	Managing rare flora	0	
	Subtotal	*2*	*9%*
Historical	Managing ridge and furrow	0	
Total		**22**	**100%**

Table 4.10 Sample of Capital Special Projects by environmental interest

Primary Interest	Feature type	SPC type	Number	%
Landscape	Boundaries	Iron railings	7	
		Casting up banks	10	
		Other traditional boundaries	3	
		Deer fencing	1	
		Ha-has	2	
	Trees	Tree protection	3	
		Subtotal	*26*	27%
Wildlife	Ponds/ drainage	Ponds	9	
		Drainage/water levels	6	
	Other ecological	Species protection	2	
		Pest control	1	
		Grazing management	8	
		Subtotal	*26*	27%
Historic	Buildings	Traditional buildings	12	
		Other constructions	4	
	Protection of SM		1	
	Restoration plans		12	
		Subtotal	*29*	29%
Access	Access/recreation	Gates/Car park/Hides	6	
		Display boards	11	
		Subtotal	*17*	17%
Total			**98**	**100%**

4.49 Overall, 25% of all sample agreements monitored contained a special project, ranging from 94% of all historic parkland agreements, followed by 44% of all coastal agreements, and 39% of orchards. Special projects in orchard agreements related largely either to casting up of earth-banks, or cirl buntings, neither specifically associated with orchards themselves. There were no special projects in the sample of Countryside around Towns lead landscape type.

Results of the evaluation process for special projects

4.50 The evaluation process examined the sample of 96 agreements with special projects, drawing information from the full monitoring and evaluation appraisal process, where each agreement was considered individually.

The role of special projects in CSS

4.51 There are essentially two situations in which special projects are appropriate:

- where the work is outside the scope of normal CSS work, or
- where the specification is significantly different from the normal standard,

and, for both, where the work helps to achieve the objectives of the Scheme and the individual agreement.

4.52 Of the 120 special projects examined, 99 (82%) fell into the category of work

outside the normal scope of the Scheme, and 21 (18%) where the specification differed.

4.53 In terms of whether special projects helped to achieve the agreement objectives, from an assessment of the objectives of all sample agreements, it was clear that they all did, but in different ways. The majority contributed to this by providing direct environmental benefit. Some, however, , had no direct environmental benefit themselves (for example cattle grids), but enabled the achievement of environmental benefit (in this case grazing management) elsewhere.

Agreement objectives and feature mapping

4.54 These differences had a direct effect on how special projects were documented within agreements. Those that provided direct environmental benefit themselves were more likely to have objectives referring to them in the agreement. For example, all bar one of the 20 cirl bunting agreements had a specific objective to create winter stubble. However, those that provided no direct environmental benefit (such as the 6 cattle grids) had no objective for their completion, although their indirect environmental benefit (grazing management) was covered.

4.55 Equally not all special projects were included on agreement maps. Again those that provided direct environmental benefit were likely to be included (with SPR or SPC codes) and those that provided only indirect environmental benefit were less likely.

The administrative process

4.56 It was difficult from the information available to make any real assessments of the administrative process of setting up special projects. The process is summarised in the PO Operating Instructions. It is normally more complicated than for standard agreements because of the 'one-off' nature of much of the work, and hence the need to seek CMD approval as there are no standard payments. Two consequences of the more complicated nature of special projects and their approval have been identified. Firstly, of 120 special projects in the sample, 8 had been agreed in principle but deferred by MAFF or FRCA pending further details. Secondly, there were some instances (not always logged in the appraisal) of proposed special projects not agreed, or withdrawn by the applicant, on which little information exists. This is likely to reflect the positive nature of the process in ensuring that weak projects do not proceed.

Quality/ease of implementation

4.57 According to the Scheme rules, special projects should be accompanied by a management plan, which helps provide details of the work required and a timetable for completion. From the evaluation it was clear that some special projects did not have a management plan. SPRs usually had a management plan, which for the cirl bunting agreements was a standard text, usually provided by the RSPB. Other SPRs and some SPCs (e.g. casting up) had standard management prescriptions included within the agreement. For some of the smaller SPCs (cattle grids, otter holts) management plans were never available.

4.58 As part of the agreement holder interviews, respondents were asked about their satisfaction with the advice received, the prescriptions involved, and the feasibility of

the tasks involved in setting up special projects. The vast majority were satisfied on all accounts, with just 14 expressing concern with regard to one or more of these issues, from a sample of 60 who expressed an opinion.

4.59 Four of these concerns related to winter stubble for cirl buntings and another three with parkland restoration, but the specific nature of these and the other concerns were very varied in nature, revealing no systematic weaknesses in the Scheme as far as the agreement holder was concerned.

Effectiveness

4.60 The full appraisal indicated that all special projects help to achieve environmental benefit. However there were 3 special projects noted as having side effects that were detrimental to the environment. These were:

- a winter stubble agreement to plough up high diversity permanent grassland,
- stone curlew plots identified in an area that would be detrimental from a landscape point of view,
- interpretation boards on National Trust land that were against NT policy for structures in the open countryside.

Scoring system report

4.61 The following aspects of the 1998 Initial and Full Assessment were discussed with POs:

- the relationship with the application form,
- the link between the initial and full assessments respectively;
- issues of objectivity;
- comparison with the 1999 scoring system; and
- the overall operation of the process.

These issues were addressed through discussion of a case study and the PO's perceptions of the operation of the scoring system as a whole.

Initial Assessment

4.62 In the sample of 21agreements, 16 had adequate information in the application for the Initial Assessment and in 12 of these cases the information supplied was good quality, clear, comprehensive and detailed. Partners were involved in the application in a number of these cases (e.g. FWAG and EN). Three of the sample contained insufficient information and a poor map, whilst in the remaining two cases, the information supplied was judged to be less important to the Initial Assessment since the farms had existing CSS agreements. In these cases the local knowledge of the PO was of greater value.

4.63 However, 13 POs reported that the application form did not provide the most appropriate information to enable them to complete the Initial Assessment. In particular, it was suggested that Part 7 be broken up into sections relating to the four CSS objectives, target area objectives and other targets such as BAPs.

4.64 Poor presentation of applications was felt to adversely affect the Initial Assessment process by the majority (18) of POs, although this was unlikely to adversely effect the outcome, particularly where the PO already knew the site. Well-presented applications enable more rapid Initial Assessments, a particular benefit where large numbers arise in areas where there is greatest competition for CSS.

4.65 Fifteen POs judged the Initial Assessment to be an objective process, although subjectivity was introduced by local knowledge. To make the Initial Assessment a more objective process, an alteration to the application form, particularly Part 7, was most often suggested.

4.66 For each sample agreement, POs were asked to identify how far the Initial Assessment enabled the particular case to be judged and to highlight any areas where 'tensions' (difficult decisions) arose. In 12 of the 21 cases, the Initial Assessment process allowed an effective appraisal, but, in the remaining nine cases some 'tensions' were identified. Table 4.11 attempts to summarise the extent to which these applications matched the categories used in the 1998 Initial Assessment.

Table 4.11 - Goodness of fit between Initial Assessment (IA) and sample applications

Case	Score	Obj	TA	CA	WF	Key issues
A11	E	x	✓	✓	NA	Very difficult for application to meet all TA objectives
A14	C	✓ just	x	x	x	Poor application, but site familiar to PO through existing agreement
A44	D	x	x	✓	✓	Harshly scored because partner over-looked SAM.
B09	E	x	✓	x	NA	Single objective application
B17	B	x	✓	x	NA	Did not meet all objectives
B32	E	✓	✓	x	NA	Poor application, but site familiar to PO who recognised potential
M10	-	Unclear	No link	x	?	Very limited application but associated with adjoining application.
O01	A	x	-	✓	-	IA unable to take into account an earlier good agreement on Culm grassland.
O33	E	x	✓	x	NA	Unclear from application that orchard represented the whole holding.

Key: Obj = CSS Objectives; TA = Target Area; CA = Comprehensive Application; WF = Whole Farm application (only relevant to applications outside Target Areas)

4.67 The 'tensions' experienced in these nine applications involved

- meeting all four CSS objectives (Obj),
- the relationship to Target Areas (TA), and
- poor quality, lacking detail and appropriate information.

In three cases, there were other CSS agreements present or linked applications.

4.68 The Initial Assessment was thought by most POs (14) to be the best process for assessing the applications against the multi-objectives of the scheme, but was limited in its ability to allow judgements to be made on issues such as degree of enhancement and value for money.

4.69 The majority of POs (19) believed that not visiting a site at this stage due to budgetary constraints led to potentially good schemes being rejected/deferred, but this was mitigated by local knowledge. Where unsuccessful applicants were encouraged to contact a CSS partner such as FWAG, this often led to a successful re-application the following year.

4.70 The changes to the Initial Assessment in 1999, in particular the increase in overall categories from five to 15, were viewed by most POs (13) as demanding a greater amount of information from the applicant than the 1998 system. These changes resulted in differences in the assessment criteria for those sites inside and outside Target Areas.

4.71 POs were asked whether the sample agreements would have scored differently under the 1999 Initial Assessment regime. Of the 17 who provided an answer, nine awarded comparable scores. The eight 'changed' scores all resulted from the greater detail in the descriptors and categories of the 1999 system.

Full Assessment

4.72 The Full Assessment process is designed to determine the environmental benefits that would be derived from the agreement should it be offered to the applicant. The majority (18) of POs found the written descriptors in the Full Assessment to be helpful, adding to the objectivity of the process, but recognised that a degree of subjectivity was inevitable in choosing between categories especially when deciding whether a change or improvement was 'major' or 'minor'.

4.73 Whilst the Initial Assessment process is a desk exercise designed to prioritise applications, Table 4.11 suggests that some cases were difficult to appraise, often because of inadequate detail in applications. However, these issues appeared not to have arisen at the Full Assessment, possibly because the site visit provided an effective means for these to be clarified. POs were unanimous about the value of the site visit to the Full Assessment process in general.

4.74 In a minority of cases (5), the POs considered the Full Assessment score to have been a poor reflection of the value of the site. In three cases the site had been overvalued, and in the other two it had been undervalued.

4.75 A number of changes were made to the Full Assessment in 1999 which were thought to be improvements by all of the POs who disliked the 1998 system. They suggested that having more scores enabled them to be more specific, provided more objectivity, ensured the score could be tied more precisely to observations made on site, and was better for the wildlife objective

4.76 The 1999 Full Assessment system was recognised by 18 POs as placing a greater emphasis on contributions to national commitments such as BAPs, which was generally supported, but not at the expense of sites of local value and potentially high enhancement which might go unrewarded in the scoring system. 11 POs felt that it was more important for applications to be within a Target Area under the 1999

system.

4.77 Increasing the scores available for the assessment of inherent value was viewed as an improvement by the majority (18) of POs, although under 'landscape' some sites may be disadvantaged because, unlike wildlife and historic features, they have to be visible to the general public.

Overall operation of the 1998 Scoring System (Initial and Full Assessment)

4.78 POs were invited to reflect upon the overall operation of both stages of the scoring system. First, POs were asked about the following six factors and their relative importance in the 1998 scoring system:

- Presence or absence of agency support
- Size of the proposed agreement land
- Applicant's environmental knowledge
- Applicant's access to labour and financial resources
- The landscape type involved
- The Target Area concerned

4.79 The presence of agency support was deemed to be most important, with the landscape type involved and target area concerned also significant.

4.80 POs were also asked about the ability of the 1998 scoring system to deliver agreements that meet the following six different factors:

- Agreements which meet the objectives of CSS
- Agreements which meet national targets
- Agreements which meet local targets
- Sites with the greatest potential for enhancement
- Sites which offer the best value for money
- Consistency across the regions

4.81 POs felt that the 1998 scoring system produced agreements that met local targets rather than national targets or the Scheme objectives. Eight POs felt that the system was designed to deliver an assessment of environmental benefits rather than value for money, although the assessment did give some pointers in that direction.

4.82 The constant adjusting of the scoring system every year was thought to be unnecessary, and a potential disadvantage to applicants who might find keeping up-to-date difficult. However, it was accepted that the system could not remain static as it had to be consistent with related policy developments.

Module 2

4.83 All of the mapped Broad and Priority Habitat data and the vegetation data

collected from quadrats have been compiled into a single GIS database that has been delivered to MAFF/FRCA. This database will provide a baseline for further research and monitoring. The results of the Module 2 survey are summarised briefly below

4.84 By far the most widespread Broad Habitat was Improved Grassland, accounting for around 50 % of all agreement land, which when extrapolated is equivalent to around 61,000 ha across England. Of this, the majority was "Semi-improved/Improved", i.e. its ecological quality could be enhanced with appropriate and relatively low cost management. Habitat mosaics and other grassland habitats accounted for much of the remainder. The distribution of the Broad Habitats varied between MAFF regions depending upon the underlying distribution of the habitats, and on the scope and local priorities of the Scheme.

4.85 Priority Habitats accounted for 15 % of all agreement land (equivalent to around 18,500 ha). In addition to the 15%, there was also land within mosaics containing one or more Priority Habitat. The extra area of Priority Habitat within these mosaics is not calculable. The figure of 15% is likely to be an over-estimate, as the surveyors were instructed to regard habitat patches as Priority Habitat if in doubt, in order to trigger the use of the quadrat. The extent of this over-estimate cannot be given until methods for identifying Priority Habitats are better developed. Calcareous grassland (4 % of agreement land), heathland (4 %) and acid grassland (2 %) accounted for the greatest area of Priority Habitat. A further 2 % of agreement land was accounted for by two large saltmarsh agreements, while agreements with Cereal Field Margins were the most frequently encountered Priority Habitats, but only took up around 1 % of all agreement land.

4.86 The analysis of vegetation revealed that 53% of all randomly-placed quadrats were categorised as the Countryside Vegetation System (CVS) class Infertile Grassland and 24 % as CVS class Fertile Grassland. The mean number of vascular plant, lichen and bryophyte species per quadrat was 22. The most diverse quadrat was found in chalk grassland and had 69 species, and the least diverse quadrat, on recently cleared ground, had 0 species. 117 of the 447 random quadrats (26%) were found to have been within Priority Habitats. No Red Data Book or Nationally Scarce species was found in quadrats outside Priority Habitats.

4.87 The quadrats within Priority Habitats had a slightly larger mean number of species per quadrat, of 24. The number of species found in Priority Habitats was not much higher than in the random quadrats because some Priority Habitats are not diverse e.g. moorland or some Cereal Field Margins, and also because the random quadrats also included some of the most diverse Priority Habitats. One Red Data Book species, *Thymus serpyllum*, and three Nationally Scarce species *Sesleria albicans, Carex humilis* and *Vulpia ciliata* ssp. *ambigua* were recorded within the quadrats. The vegetation of these quadrats had a lower proportion of CVS Aggregate Class (AC) Fertile Grassland, and a higher proportion of ACs Moorland Grass/ Mosaic and Heath/Bog than the randomly placed quadrats (as noted above, randomly placed quadrats falling within Priority Habitats were double counted). Priority Habitat quadrats also contained NVC communities of conservation importance that were scarce or absent in quadrats falling outside Priority Habitats. They included calcareous grassland (CG1), heathland (H4) and mire (M10 and M21) communities.

4.88 There were no overall trends in species number or proportion of Priority Habitats with agreement age because differences in take-up between years swamped

any effects of changing quality through time.

4.89 The correspondences of management codes and habitats were far from total, as several habitats can be found within a unit of land given a single management code. Nevertheless, the results were largely as one would have expected, except that there were frequent examples of grassland that had been identified as Highly Improved Grassland being given support for grassland management regimes such as lowland pastures and lowland hay meadows. This presumably occurred because the land was of landscape or historical importance.

4.90 Survey data were compared with results from the Countryside Survey 2000 on the basis of the three Environmental Zones (EZ1-3) that occur in England. Broadly the three zones can be described as eastern lowlands (EZ1), western lowlands (EZ2) and marginal uplands (EZ3). EZ1 and EZ2, CSS land had a much higher proportion of grassland habitats and was much more likely to be typical of low fertility situations than the countryside as a whole in these zones. CSS land in EZ1 and EZ2 also had a greater observed total number of species in grasslands and a greater mean number of species overall than the countryside as a whole. In EZ3, there was again a greater proportion of grassland habitats (again, containing a higher proportion of infertile grassland than in CS2000), but with a reduced proportion of important upland broad habitats, such as Dwarf Shrub Heath and Bog. This suggests that the CSS has failed to target heather moorland so that it reached the same proportion as found in the countryside as a whole. However, the "countryside as a whole" included the ESAs which were ineligible for CSS. If the ESAs were removed from the analysis to give the "wider countryside", as used for reporting CS2000, then the proportion of the upland habitats found in the CSS would be higher.

4.91 The differences between the CSS and the countryside as a whole clearly reflect the priorities of the CSS, especially the high proportion of grassland. There are encouraging signs within this comparison that the Scheme has successfully included land of a different character than in the countryside as a whole and of a character likely to be considered of greater conservation value.

4.92 Overall, the results show that the Scheme has targeted grassland vegetation at higher proportions than found in the countryside as a whole. Moreover, this grassland tends to be less fertile than grassland in the countryside as a whole, suggesting an increased conservation quality. Furthermore, the presence of a high proportion of Priority Habitats, and the presence of scarce NVC communities, suggests that the Scheme has successfully targeted land of high conservation value.

DISCUSSION AND RECOMMENDATIONS

5.1 The appraisal process of 484 agreements, and the three special topic reports has enabled the key strengths and weaknesses of agreement development and implementation to be identified. These are discussed below. The chapter is organised around the five assessment criteria used in the appraisal process (see list below) but drawing on and incorporating the results from all reports (excluding the Module 2 Report that is not relevant to this section). Recommendations are shown **in bold** within the text following the appropriate discussion. The recommendations detailed in this report are largely those that apply to the Scheme as a whole and address strategic or operational issues. Those more specific to individual topics are itemised in the executive summaries of the reports (Appendix 1), and fully discussed in the topic reports themselves.

- **Agreement Negotiation**
  - Scoring system
  - Agreement holder experience of agreement negotiation
  - Consultation
  - Missed opportunities
- **Appropriateness**
  - Agreement documentation
  - Agreement objectives
  - Agreement management prescriptions
  - National and county targets
- **Environmental Effectiveness**
  - Agreement management plans
  - Agreement special projects
- **Compliance**
  - Compliance
  - Cross-compliance
- **Side Effects**

Agreement Negotiation

5.2 Aspects of agreement negotiation that were considered by the appraisal process and the special report on the scoring system included: the scoring system, agreement holder experience of agreement negotiation, consultation and missed opportunities. Over the three years of monitoring, agreement negotiation was handled

reasonably well, albeit with considerable variation between agreements. The score for agreement negotiation rose over the three years, while the degree of variation declined (Figure 4.2). The project team identified a number of aspects of agreement negotiation that could be improved or used as examples of good practice, and these are set out below.

Scoring system

5.3 The scoring system has two distinct stages. First, applications are scored within five days of being received under the Initial Assessment, in order to determine if and when they receive a site visit. Following a site visit, usually undertaken by the same PO who completed the Initial Assessment, a draft agreement is prepared. This draft agreement is then scored in the second stage of the system, the Full Assessment. The conclusions and recommendations derived from the study address issues that are specific to the two stages of the scoring system, as well as those relevant to the process as a whole. Overall they identify strengths and weaknesses of both the 1998 and 1999 scoring systems and strategic improvements to the scoring system process.

5.4 The economic evaluation of the Scheme (Crabb et al 2000), made 12 recommendations with respect to the scoring system. Many of these were related to budgetary issues and value for money, but those covering strategic issues on weighting of scheme objectives and simplification have also been reflected in this evaluation (see paras. 5.7-5.11 below)

5.5 The information contained in applications is sometimes not adequate for or appropriate to the Initial Assessment. However, this is not always the fault of the applicant. The relationship between the application form and Initial Assessment needs strengthening in two areas. First, the information requested in the application form does not match that used in the Initial Assessment. Second, the format of the application does not match that of the Initial Assessment.

The information required in the application should be adequate for and appropriate to the Initial Assessment. The application form should be reviewed to ensure that any information assessed in the Initial Assessment is requested in the application form. **All information should be expressed in a clear and understandable way.**

5.6 Most POs agree that the Initial Assessment is an objective process but local knowledge and professional judgement have a part to play in the selection of sites. Where the objectivity of the Initial Assessment is undermined through the poor presentation of an application, the incorporation of local knowledge or professional judgement can serve to strengthen the decision making process. The 1999 Initial Assessment was noted as being more objective by most POs because of more detailed descriptors and greater number of categories. However, the general view was that there were too many final categories (15) and these could be reduced to ten.

5.7 Where uncertainties in the allocation of Initial Assessment scores arose (see Table 4.12), they were caused by difficulties in judging the application against the set criteria of the Initial Assessment or associated measures, such as Target Areas. On occasions this was due in part to the explanation associated with each criteria. However, the descriptors used in the 1999 system were noted as being tighter than in previous years. The POs indicated that an improved application form would reduce

the likelihood of applications being unsuccessful through poor presentation of information and a lack of the correct information. Whilst many POs felt that the Initial Assessment was an objective process they generally agreed that the input of local knowledge or professional judgement should not be eradicated from the system. Local knowledge remains important even when assessing the potential of a clearly presented application and the ability to make a professional judgement should be retained within the selection criteria. The good practice of one PO who routinely deferred poor applications with potential, suggesting that the applicant seeks advice and reapplies, should be more widespread.

The use of descriptors within the Assessment proformas, especially in 1999, increases objectivity and should continue to be used in preference to accompanying notes. Existing operating instructions should be followed for poorly presented applications otherwise considered to have potential , and the applicant encouraged to seek the advice of a partner organisation and to re-apply. The Initial Assessment should retain individual scores for Scheme objectives as in 1999 but should seek to reduce the overall number of categories. The Initial Assessment should retain an element of local knowledge in order to assess the environmental effectiveness of an application.

5.8 The relationship between the Initial and Full Assessments was generally strong resulting in applications being assessed for the same qualities at both points. Only under the 1999 system was a significant discrepancy found, where the criteria used for non-target area applications changed between the Initial and Full Assessments.

The criteria for the assessment of agreements should be consistent between the Initial and Full Assessments.

5.9 The site visit is a crucial part of the Scheme as well as the scoring system but this increases the need for professional judgement in the assessment of applications. Professional judgement is important in assessing the feasibility of the draft agreement to meet its own objectives and the overall potential of the site. The element of professional judgement may also be extended to include an assessment of the applicant's attitude to the Scheme and the general standard of environmental management on the holding. Although subjective, such information is important in relation to compliance and has a direct bearing on environmental outcomes. Where an application is adjacent to an existing environmental agreement (CSS or otherwise), the Full Assessment should consider both agreements alongside each other and thus include the added value arising from both agreements in the scoring of environmental benefits. In the 1998 and 1999 scoring systems, only existing CSS schemes were considered in this way. Applicants in other schemes such as the Organic Aid Scheme or possibly an ESA agreement would only receive an additional point for a complementary scheme.

The Full Assessment should retain an element of professional judgement, including consideration of the attitude of the applicant. The practice of scoring the application together within existing CSS agreement allows the added value of the two to be assessed. This should be extended to include all schemes complimentary to a CSS agreement.

5.10 POs expressed the opinion that the year on year changes to the scoring system were largely unnecessary and potentially unfair on applicants, as any knowledge of the

assessment is likely to be out of date. However, it is obviously important for the scoring system to reflect any policy developments, such as BAPs, and Sustainability Indicators.

The scoring system should be subject to a major review every three years but the ability to make minor changes to bring it in line with relevant policy developments should be retained.

5.11 Within the Full Assessment, POs prefer the full range of scores and equal weighting given to each of the Scheme objectives. However, there was an acceptance that national commitments, such as BAPs, need to be emphasised within the Scheme and the scoring system provides an ideal mechanism for this. Nevertheless there was a sense that such national commitments should not be used to distort the equity and balance of the Scheme's objectives, for example by disadvantaging locally important sites. The adjustments made to incorporate BAP in the 1999 system seemed to make wildlife the most important objective as it had the highest overall score. POs preferred the written descriptors used in the 1999 Full Assessment.

Wherever possible the full range of scores should be used in any category. Scores should be equal between the four Scheme objectives. National commitments, such as BAPs, should be encouraged through the scoring system but they should not preclude locally important but undesignated sites .

5.12 Agency support is considered by POs to be important in securing an agreement. Applicants should be encouraged to seek this support as they are putting their applications together.

The Scheme literature should make it clearer that support from an outside agency is an important factor in preparing a successful application.

5.13 The Scoring System is largely an assessment of environmental benefits rather than value for money. The criteria in the scoring system should reflect this rather than other factors such as ease of administration, although the encouragement of well prepared and considered applications is important. A measure of value for money would be useful in marginal cases and to explain why some high scoring applications were not offered agreements.

All the criteria should be checked to ensure that they are appraising environmental benefits, those that are not should be excluded. Consideration should be given to the development of a measure of value for money, this would be useful in marginal cases.

5.14 On the whole, POs perceived the 1998 scoring system as delivering agreements that meet the Scheme's objectives and national and local targets. The scoring system could strengthen further the distinction between inherent value and potential enhancement. For example, the scoring of the access objectives is not divided up in this way and the landscape section includes an element of public visibility. In the access section of the 1999 Scoring System inherent value criteria, 'existing access arrangement well used' are not separated from 'proposed new access'. In both the 1998 and 1999 Scoring Systems the points available under inherent value in the landscape section are specific to those landscapes that are 'visible to the wider public'. This suggests that landscapes are only valuable if they are seen; such expectations are not made in the wildlife or historic sections. The Special Report on

the Scoring System also highlighted the introduction BAPs into the 1999 Scoring System. While the POs were supportive of the integration of these measures into the scoring system, they should not distort the system. Where there is an existing BAP priority habitat, this will impact on the inherent value score but it should not have a bearing on the issue of wildlife enhancement. Where a Priority Habitat is being re-established, this is a matter of enhancement and not inherent value. Such changes will ensure the fair assessment of high environmental quality sites and also of sites with high environmental potential. In order for single-issue applications to succeed within the Scheme, PO recommendations should remain part of the process.

The distinction between inherent value and potential enhancement should be retained and strengthened. Factors, such as BAPs, should be assessed in one but not both aspects. The access criteria should be divided into categories representing inherent value and potential enhancement. So that single-issue sites are not excluded from the Scheme, the PO recommendation should be retained.

Agreement holder experience of agreement negotiation

5.15 Interviews with agreement holders highlighted a number of issues surrounding the agreement negotiation process with implications for PO practice and general administration of the Scheme.

5.16 A significant aspect of agreement negotiation is the contact between the PO and the applicant. In some cases the PO is the only source of face-to-face advice to Scheme applicants. In these cases they play a crucial role in highlighting the impact of the Scheme on existing management practices. Although, it would be impossible to expect the POs to work closely with every agreement holder, they should still be confident that each agreement holder is able to implement the signed agreement.

POs should ensure that agreement holders have the necessary knowledge and skills to implement the work proposed in the agreement.

5.17 The scoring system section dealt with issues relating to the deferral of rejected applications but there remains the issue of changes to applications that proceed to agreement. There was evidence that POs did not always explain these changes and sometimes did not justify their reasons as required by current PO instructions. This caused confusion with agreement holders in some cases.

When changes are made to an application POs should ensure that the reasons are presented to the applicant through correspondence and a copy placed on file.

5.18 Agreement holders were sometimes surprised at the time required and the cost of work outlined in their agreement. This was largely due to the expectation that the Scheme covered the whole cost, particularly of capital items. The Scheme pack should be very clear in indicating the relative contribution expected from the applicant. POs should draw the applicant's attention to this during the site visit. However, it is acknowledged that because the relative contributions of agreement holders vary regionally this will add to the administrative burden of the Scheme.

The Scheme pack should clearly indicate the relative financial contribution expected from the applicant. Consideration should be given to the provision of indicative costs (in percentage terms) of items covered by the Scheme, as in

ESAs. POs should ensure that they have drawn the applicant's attention to this during the site visit.

5.19 There were a number of occasions when applicants began work before agreements were signed. This was due to agreement holders not understanding the CS literature and often exacerbated by the late offer of agreements by MAFF. Responsibility falls on the PO to draw to the attention of applicants that work must not start until the agreement is signed.

POs should always stress to applicants that work should not begin before the agreement has been signed. Consideration should be given to the award of a derogation permitting agreement holders to carry out seasonal work before the agreement is signed.

5.20 Agreement holders should be made fully aware of those elements of the agreement that have been deferred, such as special project or educational access. The status of these elements should be clear and information provided on how they are to be dealt with.

The PO should inform the agreement holder of actions that are required for deferred elements within the agreement.

5.21 In very few cases communication between the PO and agreement holder had broken down or was very difficult. Where problems arise in resolving such a dispute there should be a higher authority, acceptable to both sides, who should adjudicate. Such a process should be activated at an earlier stage than in some of the cases examined to avoid excessive delay to the signing of the agreement. Alternatively, a decision could be taken to 'defer' the case for a year. This should be clearly set out in the Scheme documentation.

The early availability of adjudication in cases of communication difficulties or failure between applicants and POs should be considered.

Consultation

5.22 Effective consultation is crucial to the negotiation of agreements and ensures that appropriate organisations have the opportunity to comment on the proposals. The objective is to reduce the risk of insensitive or damaging work being carried out under the Scheme. Over the three years of the monitoring and evaluation, POs and applicants became more accomplished at acquiring information from statutory consultees such as English Nature (EN), English Heritage (EH) and the County Archaeologists (CA).

5.23 There were three issues that concerned the appraisal team. Firstly, *if* there was consultation with all or any of the appropriate bodies. The rate of consultation improved over the three year monitoring period but there were still a number of occasions in the third year when the agreement file showed no evidence of consultation, which was particularly concerning in mandatory cases (for example with EN on SSSIs).

There must be appropriate consultation on all applications with a qualified consultant and evidence of this recorded on the agreement file. In particular, a

stronger mechanism needs to be found to ensure that consultation with the appropriate agency takes place where a statutory environmental designation is on or adjacent to the holding.

5.24 There were also occasions where the consultee did not respond to requests for information regarding the impact of proposed agreements on environmental features. It was difficult to establish where the fault lies in the process and whether problems always occurred at the same point.

A review of the consultation procedures between POs and consultees should be undertaken, particularly focusing on the need to record that consultation has taken place.

5.25 There were a number of agreements where the advice of consultees was not followed, yet there was no explanation for this in the agreement file.

Where the advice of a consultee is not subsequently followed the agreement file should clearly indicate the reasoning behind this decision and the consultee should be informed.

5.26 Secondly, *when* consultation took place was considered by the appraisal team. This was normally undertaken soon after the receipt of an application. In cases where this did not occur there was a greater likelihood of delay in signing and inaccuracy in the agreement.

Consultation should be initiated with all appropriate agencies as soon as possible after deciding to take an application further.

5.27 Thirdly, *what* aspects of the application and holding were consulted upon. Consultees are asked to comment upon the proposed agreement and its immediate surrounding, but not the entire holding. This process excludes environmental features outside the proposed agreement area that may be appropriate for inclusion in an application. Furthermore, where additional land had been added as a result of a subsequent amendment of an application, consultation on this land did not always take place.

The consultee should be asked to consider the whole holding and not just the land highlighted in the application. This should ensure that appropriate environmental features elsewhere on the holding are included and would remove the need for additional consultation for amendments to an application.

5.28 In cases where particularly complex plans are submitted by, or on behalf of, the applicant that relate to unique or unusual features, it should be ensured that the advice of specialist consultees is sought. An example would be plans submitted by contractors for restoration of a traditional building, which should be assessed by an architect. In addition an agreement may be situated on land subject to complex property rights (such as mining or shooting rights) and again the PO should ensure that the advice of an appropriately qualified consultee is sought.

In situations where non-standard features or sites are concerned, POs should ensure that appropriate specialist agencies or individuals are consulted.

Missed opportunities

5.29 One of the major concerns regarding agreement negotiation was that not all environmental interests were thoroughly considered. Those found to have been omitted were identified as missed opportunities (see Table 4.7). Some of the recommendations already outlined in the previous section on consultation should reduce the number of missed opportunities in the future.

5.30 Where an environmentally holistic approach to Scheme entry was adopted this led to agreements with fewer missed opportunities. These agreements usually involved partners e.g. FWAG, and/or the production of whole farm management plans. The economic evaluation of the Scheme (Crabb *et al* 2000) reported that the majority of applicants (successful and unsuccessful) now obtain advice from partner organisations

Applicants should continue to be encouraged to use partner organisations wherever possible, and to produce whole farm management plans as a method of achieving a holistic approach to their application.

5.31 To assist POs in the identification of relevant environmental landscapes and features, consideration should be given to the development of a proforma for the site visit. This would require the recording of all-important features (wildlife, landscape, historic and access) on the holding eligible for management, creation or restoration under the Scheme. The proforma should distinguish between those features that are:

- covered by the current application;
- covered by existing environmental management agreements (CSS or other schemes);
- eligible for future applications but not included in the current application, or earlier schemes.

A copy of the proforma should be kept on file, and consideration given to providing a copy to the agreement holder. When in place, this could form part of the quality control system.

Consideration should be given to the development of a proforma for the site visit.

5.32 Numerically there were fewer historic and access missed opportunities than those relating to wildlife and landscape. However, their significance was a cause for concern. Some important historic sites on agreement holdings had not been protected and good opportunities for improved access had been missed. Missed wildlife and landscape opportunities were generally less significant. Measures should be put in place to ensure the equal treatment of the four environmental interests fundamental to the Scheme. For example more awareness and training on the identification of historic features may be beneficial for POs. This would include the ability to identify features which require examination by and advice from a specialist.

There should be specific training for POs (and possibly partner organisations such as FWAG) in identifying historical and archaeological features together with methods of protection and enhancement.

5.33 Some historic missed opportunities occurred due to an assumption that Sites and Monument Record (SMR) information was comprehensive. It became clear during the appraisal that SMRs are not a standard reference across all local authorities. The information in some authorities is rather sparse. This can make the assessment of historic sites difficult for the PO, and it made the appraisal of the historic interest more difficult for the appraisal team.

POs should not assume that the SMR is a comprehensive source of information for consultation, and should make greater use of specialists to assess individual sites.

5.34 The number of missed opportunities for access was particularly notable in Countryside around Town agreements where particular effort has been made to encourage access through the relationship with Community Forests. The emphasis on access in these areas should be expanded to all areas near settlements. It is appreciated, however, that crime and vandalism in an urban fringe situation, may discourage farmers from seeking additional access.

POs should ensure that access is always addressed at the agreement negotiation stage. Access should also be a primary consideration in all agreements adjacent to settlements and not just the 12 Community Forest areas.

5.35 There was evidence largely from the farmer interviews that, in a few cases, no site visit was made by a PO or that the site visit whilst arranged was not completed. No evidence as to the reasons for this were found, nor was there any pattern or trend in its occurrence on types of agreement, hence it was difficult to interpret the full impact of this on the agreement. This could be an explanation for some of the missed opportunities identified by the appraisal team.

The importance of the site visit to all potential agreement sites should be reinforced.

Appropriateness

5.36 Aspects of appropriateness that were considered by the appraisal team included all agreement documentation, the wording of agreement objectives, management prescriptions and national and county targets. The appropriateness of agreements improved over the period of the study (Figure 4.4). This improvement was due mostly to the higher quality of the written agreements, especially their objectives and management prescriptions.

Agreement Documentation

5.37 Agreement documentation covers both the agreement document, and the information kept on file to enable the history of the agreement to be tracked and verified.

The agreement file

5.38 The importance of filing all documentation in the agreement file cannot be over stressed. It is fundamental that all of the application processing and agreement management decisions are able to be clearly traced through to the final documents from the drafts, requests for information, responses, correspondence, notes of telephone calls and site visits, supporting letters and management plans.

5.39 In the majority of the agreements evaluated by the appraisal team there was information missing from the file. The missing information included letters from the agreement holder or consultees, management plans, and records of communications between POs, consultees and agreement holders. Part of the problem with the filing was that the contents were not labelled or cross-referenced so that it was difficult to know what was missing and what never existed.

The agreement file should have a contents page. Greater care must be taken to ensure all documents relevant to the agreement, particularly management plans, should be on file and where appropriate clearly cross-referenced.

5.40 Agreements are currently filed by agreement number rather than by CPH number, each agreement number being unique within a RSC. This creates a number of difficulties.

5.41 The first relates to cross compliance. This applies to all parts of a holding, not just the agreement land, it would seem logical to file all the agreement files for one holding together. (There is a strategic concern, especially relevant to cross compliance, that many farms now consist of more than one holding number. This issue should be tackled so that farm management regimes and CPH holding numbers are more closely related.) Filing agreements by CPH would also make discussions with agreement holders concerning existing or future agreements less confusing, as all the information about the agreements on the land could be accessed at one time.

5.42 Secondly, as each agreement number is not unique on a national scale, this can cause some difficulties when compiling a national database of CSS agreements. With the amalgamation of some RSCs due shortly, it may be an opportune moment to reconsider the agreement referencing system.

MAFF should consider filing agreements by CPH number and not agreement number. However, the appraisal team appreciates that changing the agreement referencing system may be an administratively difficult task.

5.43 Where there was more than one agreement on a holding, it was generally impossible to tell from an individual agreement the nature and extent of the work on the rest of the holding. Reference to existing CSS agreements within agreement objectives and an agreement map that showed both current and existing CSS agreements was encouraging when it occurred. This practice makes it clear at a glance what is expected under different agreements, and facilitates field checking and monitoring. It is acknowledged, however, that implementing this recommendation would have significant resource implications.

All CSS agreements on a holding should be accurately mapped and filed together. If it is accepted that additional land must result in another agreement, there should be one map (or set of maps) per holding.

Where there are multiple agreements from CSS and/or other schemes on a single holding, an updated document should be produced to identify each and their durations.

The Agreement

5.44 Lying at the heart of the CSS is the agreement document - the legal contract between MAFF and the agreement holder stating in detail what is expected from each party. It is also the principal, and often the only document the agreement holder will refer to inform him/her what management actions to do and how to do them. It is thus vital that this is a clear and well designed document.

5.45 Over the course of the monitoring programme, the appraisal team identified a wide variety of specific ways in which this document might be improved, and these are detailed in Appendix 6. Issues of a more general nature are set out below.

5.46 Agreements can be long and complex documents, with many schedules and attached guidance notes or management plans. The appraisal team felt that the addition of a contents page would improve the layout of the agreement, enabling the agreement holder to see at a glance what the agreement comprised. A proposed contents page is shown at Appendix 7.

The agreement document should have a contents page identifying exactly what it contains.

5.47 There was usually no internal cross-referencing within agreements, relating management plans and supplementary guidance notes to each other and the rest of the agreement. Thus for example the prescriptions for hedgerow restoration usually did not direct the agreement holder to any attached supplementary guidance notes on hedgerow restoration.

Management plans and supplementary guidance notes should be accurately referenced within the agreement, and attached to the agreement as part of the legal document.

5.48 Agreement holders were often unclear about what the cross-compliance requirements of their agreement are. Part of the reason for this is that cross-compliance requirements occur in a number of places within the agreement document. The appraisal team felt that they should be presented within one dedicated schedule in the agreement (incorporating the recommendations made later in the section on cross-compliance).

Cross-compliance requirements need to be reviewed and presented within one dedicated schedule in the agreement.

5.49 Countryside Stewardship Scheme agreements are legally binding contracts, so care is necessary when drawing them up to ensure that they are unambiguous and easily read. In particular, care is necessary when copying items from standard menus to ensure that they are accurate, appropriate to the site and that contradictory statements are not included.

The legal documents forming CSS agreements should be written in clear English

and repetition within the agreement documentation should be reduced. MAFF should seek to obtain the Crystal Clear Mark.

5.50 Typographical errors in agreement objectives and management prescriptions were unacceptably frequent. Most errors appeared to have occurred because of inaccuracies in copying and in "cutting and pasting" from the menu system. The appraisal team found that the best documentation often linked both site specific prescriptions and standard selections from the menu system.

Greater care must be taken in quality control of the text of the agreement document.

5.51 Schedule 4 of the agreement provides a table detailing the capital works to be undertaken, including year to be completed, a location code and how much will be paid. This is usually the only detail in the agreement (other than the Map and standard guidance notes) on the capital work to be undertaken. The appraisal team felt that, a number of these items (specifically special projects, tree planting and pond creation) would benefit from more site-specific detail.

More site-specific detail including general description, location, specifications and requirements for quotes, should be given for special projects and on capital works such as pond creation and tree planting.

5.52 The appraisal team felt that it would be of use to map specific designations on the agreement map. This would increase the agreement holder's awareness of their existence and importance and help future POs understand the context of the agreement. Again, however, it is acknowledged that such a course would have significant implications on the resources required to implement the work.

Mapping environmentally designated areas and features, such as SSSIs and SMs, on CSS agreement maps should be considered as standard practice.

5.53 For the majority of special projects that had a direct environmental benefit, there was a reference on the agreement map to an SPR or SPC. SPRs, particularly cirl bunting winter stubble agreements, were well identified on agreement maps as areas of hatched colour, and on more recent (1998) maps, there was text on the map to describing the special project. However other special projects, especially some of the SPCs (for example for the replacement of iron railings) were only poorly identified on the agreement map. There is a need to find better ways of showing special projects on agreement maps (e.g. avoiding the use of point symbols to record linear features on the map). It may be that lessons can be learnt from the mapping of other agri-environment schemes, such as ESAs, where similar mapping issues occur.

There is a need to find better ways of showing some special projects (especially linear features) on agreement maps.

5.54 The standard of agreement maps seen throughout the project was variable, although they did improve for year three agreements. The maps sometimes had missing capital items or misplaced or wrongly identified management codes. Improvements in the rigour of use of mapping protocols latterly are welcomed.

Greater care must be taken in quality control of the agreement maps.

Agreement objectives

5.55 The objectives set out the rationale for the agreement. As such, clear, achievable, unambiguous objectives are vital as the basis of a good agreement. In general, objectives were appropriate and feasible for the land under agreement. In some cases, however, the lack of clearly written objectives or any objectives at all (Table 4.8) resulted in much poorer agreements. The standard of the objectives improved over the three years under study.

5.56 The number of cases where the objectives of the agreement did not accord with the objectives of the Scheme was so small that agreements can be considered to be addressing the objectives of the Scheme adequately.

5.57 The appraisal team felt that there are still improvements that can be made to the objectives. Greater care should be taken to ensure correspondence between objectives and items of work. There were a number of agreements that included items of work that did not further any of the agreements objectives. In some instances these items of work were of questionable environmental benefit, and should not have formed part of the agreement. However, more commonly they were appropriate, but the objectives were in need of expansion to include the implicit objective of the work item. Leaving out these implicit objectives was liable to lead to confusion over what the agreement was trying to achieve. Brief objectives were considered more useful than long paragraphs.

POs should ensure that each item of work is helping achieve at least one objective, and that each objective is being actively furthered by at least one item of work.

5.58 The appraisal team felt that too often objectives were vague. For example, objectives to "maintain any existing informal public access" and to "retain features which may have a historic/archaeological value" are too general, both to inform the applicant of what is required, and to assess compliance. They were often included in the agreement as a result of using standard objectives copied from other agreements. The best objectives were site specific and unambiguous.

Greater care should be taken to ensure objectives are as clear, unambiguous and site specific as possible.

5.59 The use of a standard template to structure the objectives by the four environmental aspects was considered a good approach. It was felt that this encouraged the consideration of all environmental aspects in the agreement, and formed a logical structure upon which to develop prescriptions.

All agreements should have wildlife, landscape, historical and access objectives. Wherever there is an important environmental interest in an agreement, it should always be addressed in the agreement objectives. Even when there is no interest for one of the aspects, this should be stated, so that it can be seen to have been addressed.

5.60 For most special projects there was an agreement objective that related to the special project, providing the reason for its inclusion. In a minority of cases this was omitted. It was felt that the inclusion of a special project objective was important, and

for special projects that would achieve a direct environmental benefit, there should always be an agreement objective to explain their inclusion. This is less important for special projects that did not have a direct environmental benefit, providing the activity that achieved the direct environmental benefit (such as grazing management) was so covered.

There should always be an agreement objective for all special projects that have a direct environmental benefit.

5.61 The appraisal team felt that objectives were not always thorough in identifying existing environmental designations on or near the agreement land. Many objectives are seriously weakened or even negated by a lack of contextual information and there is a risk that agreement holders remain unaware of the existence or relevance of such designations. The degree of inconsistency in the inclusion of designations in the objectives was also worrying. In some cases, local nature reserves or recorded Ancient Monuments were included, whilst in others, National Nature Reserves and World Heritage Sites were omitted. It was felt that objectives should always include mention of environmental designations where these exist. When objectives made reference to other agreements on the holding (Stewardship or otherwise) this was regarded as good practice. This only occurred occasionally and should be encouraged.

Agreement objectives should always mention any environmental designations affecting and/or covering agreement land (e.g. SSSI, SM or AONB).

CSS agreement objectives should refer to other schemes that apply to the same holding.

5.62 As the BAP action plans for species and habitats become the framework for nature conservation in the UK it would seem logical to include BAP objectives as Scheme objectives. By 1998 BAPs were being cited in agreement objectives and that should be commended. However, in some agreements in the sample, BAP species were included that would almost certainly not have occurred on the site or even in the area, which would mean the agreement could never achieve its stated objective. The changes in the scoring system in 1999, make reference to national targets such as BAP species, placing more emphasis upon this in applications. However, applicants (or their advisers) may not have this knowledge and POs must be aware that records/information on BAPs varies across the country.

More effort should be made to include BAP species and habitats in agreement objectives if they occur on a holding.

5.63 Access objectives featured on most agreements, but many of these merely reiterated the legal obligation of the landowner to keep existing rights of way open. As this is a legal obligation, it is not strictly an objective directly related to the Scheme. The appraisal team felt that, in regard to public rights of way, there should be a clear distinction between Scheme requirements and legal requirements. A suitable wording of the legal requirements within the access objective might be "to ensure that all existing public rights of way crossing the holding are kept open and free from obstruction as required by legislation".

Access objectives should go beyond the legal obligation of landowners. Where there is no new access provision, access objectives should encompass legal

obligations, the access objectives of the Scheme and other site specific actions which benefit access. Where new access provision is proposed, management prescriptions should always be included in the agreement.

Agreement management prescriptions

5.64 Another issue crucial to a successful agreement was the agreement management prescriptions, which specify exactly how the agreement objectives are to be met.

5.65 Many of the issues relating to management prescriptions have been covered in the individual Topic Reports and not separately identified here. However, those issues that have repeatedly been seen to be important by the appraisal team are highlighted below.

5.66 Whilst management prescriptions were generally well used and appropriate, it was occasionally felt that they were often taken from the menu system available to POs and added to agreement maps without proper consideration of the needs of the individual site. It is still apparent that there needs to be far greater attention to detail by some POs when drawing up agreements to ensure that the objectives are delivered by the prescriptions, as recommended above in para 5.57. Although variations for many of the prescriptions were used to good effect on many occasions (e.g. the use of hay meadow prescriptions for amenity grassland), they were not used as often as they might have been.

5.67 In some cases, prescriptions were judged by the appraisal team to be inappropriate to achieve the objectives set. For instance, on two Waterside holdings there was a prescription to cut and lay hedges in area predominated by old, mature and overgrown hedgerows. In landscape terms the appraisal team felt that, in the short term, this would destroy, and risk never re-establishing, the pattern of mature hedgerows that characterised the area. In ecological terms the very delicate woodland ground flora in the hedges was at risk of damage from the disturbance inevitable from hedgelaying. Controlled mechanical trimming could have been more appropriate to maintain both the landscape and ecology in both cases. Conversely, the use of lowland heath prescriptions for enhancing upland heather moorland was an example of good flexibility in the use of management prescriptions.

More care should be taken when creating agreements using standard menus available to the POs so that prescriptions are suitably adapted to provide adequate site-specific detail and that contradictory prescriptions are not left in the agreement.

5.68 Where management prescriptions were too few or too general, the strength of the agreement, in contractual terms, could be in question. It may be that, in some cases, management prescriptions were not detailed because the PO assumed a high level of expertise from the agreement holder. Whilst such agreements, based on goodwill, may result in successful conclusions, the appraisal team considered that this was not good practice.

Management prescriptions need to be very clearly worded and unambiguous, especially for non-technical agreement holders, to avoid misunderstandings and

improve likely compliance.

5.69 As the BAP action plans for species and habitats become the framework for nature conservation in the UK, CSS should make use of any work concerned with developing BAP management prescriptions.

Where a nationally important site, species or feature are known to be present on the site or have been identified, the management prescriptions should be in line with any related action programmes (e.g. BAPs).

5.70 On occasion more consideration needs to be given to unintended impacts of prescriptions. A variety of examples were encountered during the appraisal process. One example was the possible conflict between the conservation of archaeological remains and surface soil removal on lowland heath for ecological reasons. Another was the restoration of a hedgerow in a parkland setting which may be wholly inappropriate to that landscape. Tree planting close to or above known archaeological sites, carried out under the Scheme, was also noted on several occasions. There were 3 recorded instances where special projects had detrimental environmental side effects. These may well have arisen because special projects are inevitably single issue items designed to address one environmental interest alone.

5.71 These illustrate the importance of taking full account of all interests on a site at the earliest opportunity in setting up the agreement.

Careful consideration needs to be given to the suitability of prescriptions which, while benefiting one environmental aspect, may damage another.

National and County Targets

5.72 The economic evaluation of the Scheme (Crabb et al 2000) recommended that national objectives and target landscape types be reviewed on a five year cycle as for ESAs. Similarly, county target areas should also be reviewed at regular intervals but perhaps more often than every five years. The annual regional meetings provide a sound basis on which to hold such discussions on county target areas. Whilst minor adjustments that can be incorporated quite easily a regular review will enable the impact of county target areas to be assessed more readily. The regional meetings should prepare and agree a regional character of the area.

5.73 There was evidence that specific projects were successful at using the Scheme to target certain habitat and landscape types within geographical areas. However, the overall impression of the Appraisals was that, in the main, this secured existing 'high quality' sites. The impact of this targeting is likely to be greater if marginal, sometimes smaller, sites are also brought into the Scheme. This may require further targeting and briefing of partner organisations. The approach may also need to be more strategic with targeting and promotion on a site-specific basis in some cases within the wider county target areas. Such issues should be discussed at the annual regional meetings.

5.74 Monitoring of the targeted habitats and landscape types needs to be undertaken to assess both the effectiveness of the targeting strategy, and the effects of the management on those habitats and landscapes. It is possible that the approach is deemed a success only from a quantitative point of view rather than one of

environmental enhancement. The quality of habitats brought into agreement through targeting could be assessed using an analysis of the results of the Module 2 survey on a Regional targeting basis (assuming that the sample size was found to be sufficiently large)

The impact of county target areas should be monitored and reviewed every three years. National objectives and target landscape types should be reviewed every five years.

All sites should be considered within the context of the recognised regional character of the area.

Environmental Effectiveness

5.75 The appraisal process was designed to provide expert prediction of the likely environmental effectiveness of agreements based on data collected about the holding, the land manager and the prescriptions in place, rather than monitoring the actual effectiveness of agreements. The predicted environmental effectiveness of agreements improved over time (Figure 4.6) and, as with appropriateness, this was probably due to improvements in the implementation of the Scheme as POs became more experienced and processes became more rigorous.

Managing grassland

5.76 There were a number of agreements which included the maintenance of land of low environmental quality, in particular improved and semi improved grassland (see also management prescriptions for recreating diverse grassland). The inclusion of low diversity and improved grassland was noted on a number of agreements. In some cases, improved grassland has been included for its landscape or historical importance. Generally, however, such areas should not be considered a priority in a scheme with restricted funds unless they are adjoining or linking other ecologically rich sites or more interventionist management prescriptions are considered such as ploughing and reseeding, to ensure an improvement in wildlife value and thus landscape quality.

Improved grassland fields should not be included in agreements unless they are to be enhanced by the addition of wild flowers; act as buffers to SSSIs or other areas of significant environmental value; are historically important (ridge and furrow); or are threatened by the introduction of more intensive arable farming.

5.77 The management prescriptions for the enhancement of grassland by the addition of wildflowers are expensive and every care should be taken to ensure that when used they have the best chance of succeeding. On heavily fertilised ground the success of establishment of wildflowers is often very low because of competition with "aggressive" grass species. The establishment of a herb rich sward often requires the fertility of the soil to be reduced.

Prescriptions concerning the recreation of wildflower meadows on improved agricultural fields should include recommendations for nitrogen stripping and phosphorus analysis before the wildflowers are sown. The spreading of farmyard manure on fields where the aim is to reduce fertility should be strongly

discouraged, but in other areas, it is still a desirable practice

5.78 The cheaper alternative to sowing wildflowers or introducing plugs is to spread hay onto the targeted fields. Where this technique was prescribed in agreements there was often no indication of where the hay might come from and as a result there was no guarantee that any would be found nor what its quality would be. There were many cases where the source of hay was specified and these agreements were considered to be much more effective.

Where hay spreading is recommended as a management prescription for increasing the diversity of semi-improved pasture, the source of the hay should always be specified.

5.79 It was noted for all lead landscape types that involved the management of grassland by grazing that some agreement holders did not have the stock or the experience of livestock management to carry out the prescriptions laid out in their agreement. Such problems should be detected during the negotiation phase of the agreement but if not the effectiveness of agreements where the prescribed grazing cannot take place will be much reduced.

Grazing management prescriptions should reflect the livestock available. It may be appropriate for CSS to help agreement holders to reintroduce stock onto farms so they are not always relying on tenant graziers. This would open up possibilities for marginally productive arable land to be put back to grass.

5.80 Where grazing animals are available they must be managed in such a way as to achieve the objectives laid out in the agreement. Unfortunately the management prescriptions concerning stocking rates and sward heights can be brief in the extreme, especially for agreement holders with a non-farming background.

There is a need for POs to provide more detailed information regarding stocking rates and sward based guidelines, including issues related to timing and control of grazing stock.

5.81 Stocking rate prescriptions require interpretation for the specific site in question, which may be difficult to judge from a relatively limited site visit There is an assumption that the whole of a land parcel is uniform and there is no variability to show how stock will preferentially graze some areas to others. The understanding of how differential grazing by stock affects different vegetation is beginning to be understood. The Scheme needs to be flexible enough to allow for sloping ground and relate advice to the agreement holders understanding. Some farmers work by sward height while others prefer number of stock.

The management prescriptions should use either stocking rates or sward height or both depending on the understanding of the farmer. Stocking rates should allow for sloping ground and differential grazing.

5.82 When grazing is reduced there is a tendency for injurious weeds, notably creeping and spear thistles and ragwort, to become more abundant. Currently the Scheme allows agreement holders to weed-wipe infected areas once they receive permission from MAFF/FRCA. This procedure was seen by farmers to be too cumbersome and slow and has lead to far greater infestations than if a prompt

treatment had been applied.

Derogations for the management of injurious weeds should be made easier to acquire for agreement holders so that a more rapid response can be made, in order to act on problems as soon as they become apparent.

5.83 More thought needs to be given to the grazing of horses on agreement land. This is increasingly important with a significant number of non-farmers and hobby farmers entering the Scheme. Grazing of horses is normally excluded under schedule 2.1, para A5. Where it is specifically allowed, the exclusion of horses under schedule 2.1 is omitted, but there is not a positive grazing prescription provided. This causes confusion and needs to be addressed.

Where the grazing of horses is required on agreement land grazing prescriptions should always be included to ensure good grazing management.

Re-creating grassland on cultivated land

5.84 Many of the agreements to re-create grassland on cultivated land used poor seed mixes, which would be unlikely to achieve the desired effect ecologically. The main concern relates to the lists of species given in the management prescriptions at present. Although various combinations of species from the menu that would create different and desirable grasslands can be achieved, there are many more combinations of the species in the menu that would produce very undesirable results.

The prescriptions relating to sowing mixes of grasses must be written much more carefully as very inappropriate combinations of grass species could be sown at present.

Heathland management

5.85 The current definitions of lowland heath and moorland are misleading and have lead to inappropriate management prescriptions. There were instances where land that was obviously moorland was categorised as lowland heath because it was marginally below 1000ft (the cut-off point in the English Nature definition) and lowland heath in the south-west and Cannock Chase was counted as moorland because it was marginally above 1000ft.

The division between Lowland Heath and Heather Moorland needs to be clarified so that appropriate management prescriptions are applied.

Field Boundaries

5.86 The appraisal team felt that the standard prescription detailing species for hedge planting could be improved. The standard prescription provides a species list (of about 20 species) from which to choose a minimum of four, no one of which should comprise more than 75% of the hedge. This precludes local variations such as hawthorn only hedges, and the species list is restrictive (not including tree species often found in a hedges such as beech, oak, or elm), while permitting, at the extreme, planting a hedge of 75% field rose. There is also the issue of the provenance of the stock used for new planting, many nurseries stocking plants imported from the

continent. There is considerable variation within species, and imported stock may well be unsuited to local conditions, or be unpalatable to local insects, thus being sub optimal for establishment and/or local wildlife.

Hedge species to be used for planting should be listed in a more detailed and site-specific manner, and reference should be made to the use of stock of local provenance.

5.87 Care must be taken to ensure boundary restoration work is appropriate both in terms of regional styles, and to the character of particular boundaries. Standard prescriptions are not always suitable. Where field boundary restoration is proposed, all of the elements present or lost, and characteristic of the location, should be restored together to protect and maintain the integrity of the land. For example, where hedges with earth banks are to be restored, restoration should always include casting up and repairing the bank prior to planting.

Care should be taken to ensure restoration prescriptions are faithful to the historic nature of the boundary.

5.88 The appropriateness of rebuilding banks to a common style was questioned in the appraisal process. A single CSS management prescription exists for the style of rebuilding banks. On most coastal farms sampled, for example, there was more than one style of bank; the style depending on the age of the bank, or its geographic location. The appraisal team felt that it would be inappropriate to "restore" a bank in the style of the wrong period, and would like to see more flexibility in the use of different styles of wall and bank restoration.

More flexibility, coupled with customised specifications, should be included in the prescriptions for traditional boundary restoration. This would incorporate regional variations, including different wall and bank styles, as well as hedge laying and coppicing methods.

5.89 Tree lines, which are important landscape features, especially along river sides are not covered by prescriptions. In one or two cases these features have been classified as hedges, and given hedge prescriptions which are inappropriate to tree lines. Equally, while there is a prescription for ditch restoration and management, the evidence suggests that it is not widely used. In the absence of a management plan, ditches are often overlooked, when sensible and sensitive management may be required. In waterside situations ditches are often very important landscape, ecological and historical features.

The menu of management prescriptions needs extending to incorporate detailed prescriptions for certain items not currently available such as tree line management, and existing prescriptions for ditch management need to be more widely applied.

5.90 The appraisal team felt that the source of stone should always be clarified where there is wall restoration. Management prescriptions for wall restoration typically do not state that stone for rebuilding walls should not be "robbed" from other walls, or other stone features on the holding. Cross-compliance should ensure that existing walls and historical features are maintained, but this is stated in a part of the agreement that the agreement holder may not read before undertaking walling work.

Moreover, the agreement holder may not consider relict walls as either walls or historic features. It was not clear how often this was happening, but it was felt that the message could be reinforced in the management prescription for wall restoration to minimise the risk of damage to other important stone features on the holding.

Care must be taken to ensure that the source of the stone to be used in stone walling is specified, to prevent the robbing of obsolete boundary features.

Capital items

5.91 Where capital items were concerned, the appraisal team felt that more details should be given. While standard guidance sheets for activities such as pond creation, tree planting and bracken control were available and useful, this guidance was in no way site specific. Agreements could have been improved with the addition in Schedule 2 of more site specific interpretation of the management required. For example, tree planting occurred on many agreements although little detail was available other than a general indication of the location on the agreement map. Details such as rationale, species and subsequent aftercare management should be included in Schedule 2 prescriptions.

More detail should be provided in the agreement on capital items. These include tree planting and pond creation (see paras. 5.44-5.54).

Other Management

5.92 Recommendations concerning the management of orchards and arable field margins can be found in the topic reports relating to those lead landscape types. Further, more specific recommendations for the management of grasslands, arable reversion, lowland heath and moorland, boundaries, access provision and capital items can be found in the various topic reports.

5.93 Small and, sometimes, very important wildlife features were found on the holdings included in the sample for this project. Currently within the Scheme, there is no apparent mechanism to protect these features through cross compliance (see paras. 5.116-5.123). Often these small features do not require specific management prescriptions, merely protection from damage. Theagreement holder could be informed of such features, and by including them on the agreement and agreement map, they will be protected by cross compliance.

Small wildlife features or small areas of habitat should be protected by specific prescriptions and by inclusion on the agreement map. This should be the case even if there is no change in management proposed, as it brings the feature to the attention of the agreement holder.

5.94 The provision of access is dealt with in all the landscape topic reports and educational access specifically in the Educational Access Topic Report. Recommendations for improvements to the provision of access are given in all the reports and alluded to elsewhere in this report.

Agreement management plans

5.95 Management plans are free standing documents which provide additional

detail on how management operations are to be undertaken. They may be either for specific scheme operations e.g. orchard management, or for wider areas e.g. whole farm management plans. In many cases they have been produced as a mandatory requirement for particular scheme management operations, while in other cases they were discretionary. In this latter case the management plan was either written before the CSS application was made, or because the agreement holder wanted additional advice on land management on top of that provided in the agreement, or because the PO judged the agreement to be so complex that he/she asked for one to be produced.

5.96 Management plans have been considered in a separate special topic report. They were considered essential for some agreements and very useful for many others. The appraisal found them variable in quality, especially for 1996 agreements and to a lesser extent 1997 and 1998 agreements. Management plans can provide the detail necessary to carry out and schedule complex tasks more clearly than agreements as they are currently written. Management plans also illustrate where operations that cannot be determined from agreement maps, such as scrub clearance, are to take place.

5.97 The first issue the appraisal team addressed was under what circumstances should management plans be produced. The PO Operating Instructions stipulate when management plans are currently required. It was felt that a requirement to produce a plan for all special projects, such as cattle grids, was perhaps unnecessary. On the other hand there were some complex agreements where the availability of a management plan would have greatly improved the understanding and effectiveness of the agreement. Equally agreements involving important environmental designations would benefit from a management plan.

POs should ensure that a management plan is always prepared in situations where it is a requirement.

5.98 Management plans are a requirement for parklands orchards and buildings. These are often complex restoration tasks. Management plans were not always available.

Historic agreements, including those for parklands, orchards and buildings, should always be based on a management plan prepared or approved by the relevant specialists.

5.99 The appraisal team also felt that when non-mandatory management plans had been produced for more complex agreements (e.g. raised water levels, multiple agreements, or complex multiple tasks within a single agreement), they generally led to better agreements. Whole farm plans in particular also provide farmers with a means of cross referencing different agreements from different schemes and allow for a staged approach to entering parts of the farm into the Scheme.

POs should encourage the use of discretionary management plans for more complex situations or agreements, or for agreements covering important environmental designations.

5.100 Management plans should be legally part of the agreement but they were rarely referenced in the agreement. Thus it was unclear to the appraisal team whether a management plan had been produced unless a copy was attached to the agreement (it rarely was). This also made it unclear what the legal status of the management plan

was, which version was being followed (on occasions when more than one had been produced over the years), and whether the management plan prescriptions took precedence over those in the agreement if they conflicted.

Management plans should always be referenced in the agreement, citing the author and date and stating which prescriptions (management plan or agreement) take precedence. It may be appropriate to locate all information pertaining to the management plan (including the plan) in a dedicated schedule.

5.101 The advice available on the production of management plans is inconsistent and inadequate. This has led to a very variable standard of plans being submitted. The majority of applicants are likely only to have had available the advice set out in the CSS application pack. This does not mention the need to include consideration of landscape or historical features, a full site description including background context, the evaluation and a plan. It was felt that clearer and more comprehensive standard written guidance needs to be available to applicants on the preparation of a management plan, which could include a standard 'framework' document, to serve as a model for the production of a plan

Additional guidance should be provided to applicants by POs. This should include a standard 'framework' document, to serve as a model for the production of a plan, and access to a sample management plan library.

5.102 Such guidance notes should be available to applicants to explain the requirements of a management plan. They should cover both the rationale for the plan, and the structure of it (objectives, contextual information, an evaluation and a work programme and map). They could refer to the objectives of the scheme, delivery of county target area objectives, value for money and how this fits into the context of the wider holding. This should encourage applicants to produce management plans that look wider than the particular issue or habitat under consideration, ideally at the whole holding and covering all environmental interests (ecology, landscape, historic features and public access). In particular, plans for scrub control should also include the management of the primary habitat.

Applicants need to be encouraged to produce plans of a high standard, which would include objectives, contextual information, an evaluation and a work programme.

Applicants should be encouraged to produce management plans that look wider than the particular issue or habitat under consideration, ideally at the whole holding and covering all environmental interests.

5.103 Many management plans were produced after the agreement was signed. In light of the variable quality of management plans, and the lack of documented guidance on the agreement file provided to the agreement holder, the appraisal team felt that the specification for the production of the management plan should be included in the agreement. This would state the geographic area to be covered by the plan, stipulate a date for completion with perhaps a financial penalty for non-production. This would make the requirements clear to the agreement holder and ensure a common understanding of expectations.

For management plans produced post-agreement, a specification should be

included in the agreement, including a date for completion and perhaps a financial penalty for non-production.

5.104 For the more complex management plans, for example for traditional buildings , it may be that more specialist advice is required for both the agreement holder on the plan itself and for the PO on the assessment of its quality.

For more complex management plans, POs may need to seek additional advice on both the content and specification of the plan.

5.105 The appraisal team questioned whether a fixed payment rate should be used. Some management plans were essentially copies of other existing CSS management plans, while others involved a large amount of original work. Parkland restoration plans are paid at a percentage rate of cost

The use of a standard payment rate for the production of a management plan should be reviewed, and if appropriate be increased in certain cases but a percentage rate for all cases would probably lead to over elaborate and expensive plans being produced.

Agreement special projects

5.106 The appraisal team felt that the requirement for a management plan for simple SPC (as set out in the PO operating instructions) should be dropped (which in practice it appeared to have been), and replaced by the rationale behind the project. This would provide a record of what the project aims to achieve. At present the only reference the agreement makes to special projects is in the schedule of payments and the map. In order to improve the comprehensiveness of an agreement in the absence of a management plan, more detail on special projects should be provided under the prescriptions. In particular this should include details such as location, the rationale for the project and the reasons for changing the standard prescriptions, when the special project is a variation on a standard item, and quote requirements. For low value but technically critical special projects (such as otter holts) information leaflets may fulfil this role and assist both uptake and effective completion.

The requirement for simple special projects to have management plans should be dropped, but a rationale behind the project should be included in the agreement, whether or not a management plan is present.

Compliance

5.107 The compliance of agreement holders included both a willingness to observe and meet the management prescriptions within the agreement and issues of cross-compliance associated with the agreement. The appraisal team did not monitor compliance *per se*, as the majority of agreements were in their first year of operation. However, a judgement was made on the extent to which the agreement holder was expected to comply. The level of compliance was judged to be high for the vast majority of agreements (Figure 4.7), with the likelihood of compliance increasing over the three year period (Figure 4.8).

Compliance with Agreements

5.108 There were a number of factors influencing the degree to which agreement holders complied with the agreement. For some, there were financial constraints, either because of a change in circumstances after the agreement was signed, or because they did not understand the financial commitments that the agreement entailed. For others, the amount or timing of the work posed made it difficult for the agreement holder to keep to the agreement timetable where they were reliant on in-house labour. Although it is difficult to fully assess an applicant's financial status, where an extensive programme of capital works is proposed, the PO should reduce the work load if it is judged too onerous financially and in terms of available labour on the holding. Finally, there were a minority of agreement holders who were unwilling to comply with aspects of their agreement. Some of these cases were the result of a lack of understanding of what the Scheme was trying to achieve, suggesting that greater effort is required to fully explain the Scheme objectives.

POs should ensure, as far as possible, at the agreement negotiation stage that the applicant has the financial resources and labour to be able to undertake the quantity and timing of work proposed. Greater effort should also be made to fully explain the Scheme objectives to applicants.

5.109 The availability of contractors presented some agreement holders with difficulties in carrying out work at the allotted time. This was particularly serious in Cumbria and Northumberland where there was a scarcity of drystone wallers in 1997 (see Upland topic report). For some agreement holders, particularly those with small-holdings, obtaining the services of a grazier has also proved difficult. Applicants should be encouraged to investigate the availability of contractors and graziers at the time of applying for the Scheme.

5.110 In a minority of cases, the standard of dry stone walling posed a threat to Scheme compliance. Dry stone walling should only be carried out by qualified wallers or members of the Dry Stone Walling Association (DSWA), if contractors are used. If farm labour is used, the PO must be satisfied that they are capable of working to DSWA standards, or will receive suitable training.

The Scheme documentation should encourage applicants to investigate at an early stage the local availability of contractors and graziers.

5.111 Cases of non-compliance were observed in some of the cases where the land under agreement was managed by a tenant. Problems arose when the tenant was not committed to the Scheme or ill informed about the requirements of the agreement. The appraisal team felt that it should be the role of the PO to check that the tenant was fully committed to the agreement. One way to achieve this is to encourage more joint landowner / tenant agreements so that the tenant has equal ownership of the agreement.

Encouragement should be given to more joint landowner/tenant agreements, to give tenants ownership of the agreement.

5.112 On a few occasions the agreement holder noted that compliance with the terms of the agreement would not have provided the best means of fulfilling the agreement. It is important for the Scheme to be able to incorporate the initiative of farmers and

landowners in delivering Scheme objectives, particularly as they become increasingly proficient environmental managers and knowledgeable about environmental management techniques.

Consideration should be given to the inclusion of a mechanism whereby the initiative of land owners and managers can be encouraged.

Cross-compliance

5.113 The cross-compliance element of the agreement is designed to ensure that the agreement holder does not damage environmental features on the holding not specifically covered by the agreement.

5.114 In many cases it was not clear from the agreement if cross-compliance referred to the land under agreement, or to all of the land on the holding. The appraisal team felt that it should be the latter.

The Scheme documentation needs to make clear that cross-compliance requirements apply to the whole holding.

5.115 The intention of Schedule 2.4 is to specify the prescriptions common to all boundaries under agreement. The appraisal team felt that it was unclear whether this included all the boundaries on the holding. It was felt that cross compliance applied to traditional boundaries (including non-stockproof walls and hedges) should be extended to the whole holding, and these prescriptions located in a separate, and comprehensive cross compliance section of the agreement.

Consideration should be given to the creation of a discrete section on cross-compliance requirements for traditional boundaries within the agreement.

5.116 The appraisal team felt that the current cross-compliance guidelines placed insufficient emphasis on the protection of traditional boundary features.

The standard cross compliance requirement which prohibits the removal of any traditional boundary on the holding (without PO consent) should be highlighted in agreements.

5.117 The appraisal team occasionally found that boundaries marked on the OS base map used for the agreement did not now exist on the ground. Also, in one or two cases, relic boundaries of historical importance were found to exist on the ground, but were not shown on the OS base map. This makes the monitoring of cross-compliance very difficult as it may be unclear to both the agreement holder and the compliance monitor those features that exist and those to be retained.

All traditional boundaries should be marked for preservation. The OS base map should not be assumed to be correct for this purpose.

5.118 Features normally covered by cross-compliance are included in Schedule 2.1 of the agreement. The appraisal team felt that there were a number of cross compliance requirements that should be made more explicit within this Schedule:

- Protection of field and hedgerow trees from felling (unless required for good forestry husbandry), mechanical damage and root disturbance;

- Prohibition on the use of metal detectors and the disturbance of sites of archaeological interest;
- The requirement (albeit at the PO's discretion) to prohibit increases in stocking rate on the rest of the farm where valuable land is threatened;
- The use of pesticides and herbicides to control aquatic plants and bank-side vegetation (except for the control of pernicious weeds).

Cross-compliance features should be made more explicit in Schedule 2.1.

5.119 Consideration should be given to adopting a standard approach to the identification and marking of cross-compliance features on agreement maps (Schedule 1), to help inform the agreement holder of their cross-compliance requirements, and facilitate compliance monitoring. Important veteran trees are an example of this. If they were mapped than they would be brought to the attention of the agreement holder and their condition could be monitored.

A standard approach to the mapping of cross-compliance features should be adopted.

5.120 Cross compliance issues were confusing to some agreement holders and need to be clearly explained in the Scheme literature, by POs and in the agreement itself.

Greater emphasis should be placed on communicating cross compliance requirements.

Side Effects

5.121 Side effects were few or non-existent for most agreements (Figure 4.9). There were differences between lead landscape types. The most notable was the Waterside lead landscape type where there were many more side effects than in the others. This was largely because the buffering of watercourses, which provides protection against pollution from agricultural operations and is a major benefit of these agreements, was not included as a specific objective in the 1996 agreements from whence the Waterside sample came. By 1998, the buffering of watercourses was often a stated objective and, as a result, would not be recorded as a side effect.

5.122 Evidence from the second and third years of the appraisal process suggests that the environmental knowledge of the agreement holders is both increasing and changing. The practices on some areas of non-agreement land have changed and there was a general acceptance that practices undertaken within the scheme are transferable to other areas.

STRATEGIES FOR THE DEVELOPMENT, MONITORING AND EVALUATION OF THE SCHEME

6.1 The final chapter reflects on the three year monitoring programme whilst also attempting to identify strategic changes and developments to the Scheme. The chapter is divided into three sections. The first section deals with possible strategic improvements to the Scheme identified during the monitoring and appraisal process and preparation of the special project reports. The second section reflects on the methodology employed in the monitoring research and highlights some issues that should be considered in the design of future monitoring strategies for the Scheme. Lastly, an approach to monitoring the overall performance of the Scheme in the future is discussed and performance indicators in the areas of administration, uptake and output are proposed.

Strategic improvements to CSS

6.2 Those issues, identified during the appraisal process and from the special topic reports, which relate to the future development of the Scheme at a strategic level are presented in this section.

6.3 The Scheme was criticised by agreement holders and in the topic reports for its lack of flexibility; two examples are derogations and the fixed nature of management prescriptions across the whole of England. Given that the introduction Article 12 of the Rural Development Implementing Regulation (EC 1750/1999) will ensure that any decrease in grazing level cannot be balanced by an increase elsewhere on the farm, new agreements under the Scheme are more likely to have a bearing on the management of the whole farm. This may make the Scheme less attractive to new applicants as opposed to those renewing existing agreements. Consequently there may be a case for a lower entry grant aid scheme. This would need to be easily set up, less bureaucratic, and probably with lower payments. As an entry scheme, it would give more cautious farmers a chance to try out conservation activities as an interim step towards full entry into CSS.

MAFF should consider a simplified entry-level scheme for 'new conservationists'.

6.4 Where adjacent landowners have set up groups of agreements to protect a landscape, historic features, species or habitat, they have generally been successful and should be encouraged, particularly if there is an element of public benefit through improved access. The promotion of applications on a catchment basis should also be encouraged, especially at the headwaters, as there is a need to retain water in these areas for a longer period to prevent them drying out and reduce flooding further down stream.

MAFF should consider how adjacent landowners could be encouraged to protect environmental features that run through multiple holdings.

6.5 Many holdings had more than one agreement on them, and this is likely to become more frequent with the increased funding of the Scheme. The scheme would be simpler both for MAFF to administer and for the agreement holder to understand if extra elements could be added on to the existing agreement, or the existing agreement

terminated and a new agreement incorporate all the elements of previous agreements. This will avoid the situation when multiple agreements begin to expire after 10 years, and will need to be renewed individually.

MAFF should consider allowing agreements to be "updatable" rather than having multiple agreements on one holding.

6.6 In some cases, items such as field boundaries were highlighted on the agreement map as features that could be brought under agreement in the future. In these cases MAFF should consider developing a clear procedure for revisiting these elements and adding them into the existing or a new agreement.

Where the restoration of features such as field boundaries is targeted on the agreement map for a future agreement there should be a clear procedure for revisiting after a specified time to initiate the restoration required.

6.7 Ensuring all environmental aspects are covered is particularly important where single interest bodies or organisations, such as the RSPB, are making the applications on their own land or on behalf of landowners. Single sector organisations may focus on a single issue, such as wildlife, neglecting archaeology and landscape. It should be the job of the PO to overcome the bias caused by these organisations. The larger organisations can often apply for many agreements in any one year, and at the moment there is no uniformity or co-ordination either in the applications themselves or the way that they are handled by the RSCs.

POs should be aware of the tendency for single sector organisations to focus on the environmental issue of most importance to them at the expense of others and compensate for this. There should also be consideration of a means of co-ordinating the handling of applications from these organisations.

6.8 It is recognised that specialist advice sought in the preparation of the application, whilst often worthwhile in terms of producing good applications and saving PO time, is expensive. Moreover, the current payment (£120 in 1999 to successful applicants only) may be inadequate, especially given the variation in quality and cost of assistance.

The payment rate for assistance in preparing an application should be reviewed including whether a standard or variable payment should be used.

6.9 There should be a nominated PO to co-ordinate educational access issues in each Region. Additionally, POs should consult with an educational specialist externally (just as other experts are consulted in the agreement negotiation process). Alternatively, nominated POs should gain specialist training in this area.

Consideration should be given to the appointment of a PO to co-ordinate educational access issues in each Region.

6.10 The appraisal team felt that the classification of agreements by lead landscape type was often misleading (for example the categorisation heathland as either lowland heath or upland). There were relatively few occasions where only one lead landscape type was represented on any particular holding, and many agreements had the potential to lead on three or more landscape types. In some instances the identified 'lead' landscapes was not the main focus of the application, for example a small area

of land management compared to an extensive wall restoration programme. Consequently, the appraisal team found this classification of little use, and in many ways a confusion, implying distinctions which are not necessarily there. If they are to be retained care must be taken to ensure agreements are in the correct lead landscape type so that statistics reporting by lead landscape type are not erroneous.

The principle of 'lead' landscape types for categorising CSS agreements should be reviewed.

6.11 Biodiversity Action Plans for species and habitats have become the framework for nature conservation in the UK. Although the BAP has been incorporated into some management prescriptions e.g. cereal field margins, and in some areas BAP species have been targeted by the Scheme e.g. otters and horseshoe bats, MAFF should consider how CSS can be further integrated within the BAP framework now that this has been completed. In 2000, MAFF agreed to achieve the "Quality of Life Indicator" that the decline in farmland birds should be halted or reversed. There could be a case for reviewing Scheme management prescriptions to achieve this target. Such a development should also be seen in the context of a lack of a similar framework for the other three aims of the Scheme, landscape, historic and access.

There should be consideration of a review of how BAP species and habitats, and also farmland birds can be further integrated in CSS. MAFF should also consider the need for a similar framework to promoting and incorporating wildlife interests through BAPs for landscape, historic and access.

6.12 It may be appropriate for woodland management to be included in the Scheme. In the preparation of Community Forest applications, it is confusing to applicants as two applications need to completed for what is essentially an integrated management approach. In other areas, some agreement holders view woodland and non-woodland land as single multi-use management units with environmental potential if managed as such. However, the position with regard to the Woodland Grant Scheme would need to be clear to prevent double funding or clashing approaches.

MAFF should consider including woodland management in the Scheme.

6.13 The MAFF special project database should be improved. No additional data need be collected, but it should be brought up to date and comprehensively maintained, so that evaluations of the role of the various management or capital items can be completed more effectively in future. It is the only facility available for tracking the overall type and numbers of special projects approved.

The MAFF Special Projects database needs to be improved, and regularly updated and maintained.

6.14 MAFF should consider ways in which more frequent consultations on Scheme management prescriptions could be made. Consultation already takes place on Target Area issues in the Regional Agri-environment Forums and the national targeting of CSS through the National Agri-environment Forum.

The whole range of management prescriptions used in CSS should be put out for consultation to the National Rural Development Forum (formerly the National Agri-Environment Forum) periodically (perhaps every 3 or 5 years) for a major

review. There should perhaps also be a window within each year for partners to comment on existing prescriptions and suggest changes resulting from existing research findings.

6.15 There is a particularly strong case for making the production and retention of winter stubble a routine management item. Winter stubble retention for cirl buntings is common to many agreements in the coastal areas of the South West. It is generally covered by standard management prescriptions, and often prompted by RSPB interest in the agreements drawn up. From an ecological point of view, winter stubble retention would benefit small birds and mammals wherever it occurred in England. Indeed in the major arable areas, apart from arable margins and arable reversion, it is one of the few management options that would provide wider environmental benefit. For these reasons it was felt that consideration should be given to making the creation and retention of winter stubble a routine management item throughout England. This management system is being trialled in the Arable Stewardship Pilot Scheme.

Consideration should be given to making the creation and retention of winter stubble a routine management item throughout England, to provide wider benefit to farmland birds and small mammals (assuming the trials indicate that the management works).

6.16 The case for making casting up a standard capital item is equally strong. This was a very common capital special project in 1998, particularly in the South West, where earthbanks are especially common. Casting up, as a special project, is used to complement earthbank restoration, which is a standard management item, in situations where less work is required.

Consideration should be given to making the casting up of earthbanks a routine management item, because it is not a complex task.

6.17 The case for making restoration plans a standard item is less clear, but in any situation where restoration and reinstatement is to be carried out then a restoration plan would be a useful initial stage. The provision and erection of interpretation boards were common special projects on many of the sample agreements. There is a strong case for considering these as routine capital items where access and amenity are concerned. A common CSS format could be used, and this would complement the range of other access capital items currently available under CSS, many of which have regional variations. To accommodate with this variation it may be appropriate to consider a standard percentage cost rate, up to a maximum limit. As with other standard items, where the work requires completion to a different standard (and hence different cost) than normal, then the flexibility still remains to consider the approval of a special project for any of these tasks.

Consideration should be given to making restoration plans and interpretation boards standard capital items.

6.18 The issue of on-going advice provision to agreement holders needs to be addressed to ensure that agreement holders know what they should be doing, why they are doing it and to resolve any practical difficulties they have in undertaking the work. At present, few agreement holders have any direct contact with a CSS PO unless they strongly request a visit. Neither is there a formal mechanism for contacting other

agreement holders. The agreement holder interviews from Module 1 gave the strong impression that agreement holders consider the current POs 'Care and Maintenance Visits' as inadequate. This is supported by the findings of the Economic Evaluation of Countryside Stewardship (Crabb *et al* 2000). One possibility for improvement might be to facilitate information exchange between agreement holders. A number of agreement holders have suggested that a 'chat site' on the internet would be useful. This would be relatively low cost but is obviously prejudicial against those not on the net. An alternative suggestion would be to set up face-to-face information exchange meetings between agreement holders. POs could lead and facilitate these, and it would be less time consuming than one to one visits. Another example of additional support would be advice to agreement holders regarding contract management (for employment of consultants or contractors to provide services or construction works). An example of a simple contract could be made available as part of the CSS documentation.

There should be a review of how 'after-sales' information and advice services can be improved.

6.19 Consideration should be given to the inclusion of a training element in the Scheme, to enable agreement holders to learn any new skills required to effectively implement their agreement. For example, the Irish Rural Environmental Protection Scheme (REPS)[5] does this and has been shown to be very successful (Emerson and Gillmor, 1999). Training could be subcontracted to organisations such as FWAG, the Dry Stone Walling Association and The Devon Hedge Group, so that POs would not be burdened by this. The means of technology transfer also needs to be considered.

There should be a review of how a training service could be integrated with the Scheme.

6.20 Ongoing research into the management of agricultural land for environmental benefit needs to be effectively disseminated to POs, so that it can be used to formulate effective agreements. FRCA staff are often seen at conferences and open days and this is a good way of collecting information and should be encouraged. In addition regular contact with ADAS, Game Conservancy, CEH, the Institute for Grassland and Environmental Research, Central Science Laboratory, University Departments etc. could be formalised because the organisations concerned are not always efficient in promoting their results. Results appearing in the scientific literature need to reach MAFF/FRCA and then be disseminated to the POs. The scientific community needs to have a regular contact point to which papers and reports can be sent .

Ongoing research into the management of agricultural land for environmental benefit needs to be effectively disseminated to POs, so that it can be used to formulate effective agreements. The means by which this is done needs to be considered.

[5] The REPS is designed to reward farmers for farming in an environmentally friendly way and to bring about environmental improvement on farms. It was designed and implemented in response to EU Regulation 2078/92.

Strategies for future environmental monitoring of the Scheme

6.21 This section reflects on the methods employed in the monitoring research and identifies issues for consideration in the design of future monitoring strategies for the Scheme.

Reflection on the methodology employed in the monitoring

6.22 A novel, interdisciplinary methodology was adopted in the monitoring and evaluation of the Scheme. This proved to be a robust approach to the assessment of a range of environmental, administrative and behavioural aspects of the Scheme at both the individual agreement and the lead landscape type level. It required skilled and experienced experts in ecology, landscape architecture, landscape history and rural social science to interpret the desk study, agreement holder interview, agreement and field survey data and agree scores for the 5 key criteria of the appraisal. Given the same level of technical and conceptual understanding in a similar group of experts, this methodology, with minor modifications, should be applicable and repeatable in the future in similar situations, using the same assessment criteria. A number of reflections can be made which are specific to the desk study, agreement holder interviews and field surveys.

6.23 The importance of the desk study was particularly noticeable in the area of agreement negotiation where the files yielded information on the nature of the application, the use of the scoring system, consultations with partners and the contribution of the PO in shaping the agreement. The Appraisal team found that they were increasingly dependant on the desk study to determine the extent of existing involvement in management schemes and the nature of discussions between the PO and the agreement holder, which assisted in the assessment of missed opportunities. Overall, the desk study was crucial in determining the effectiveness of the PO's involvement in the agreement. This included situations where the best possible solution was not an option because of the intentions of the agreement holder, in such circumstances the appraisal process had to account for the second best option being secured. Elsewhere in the Appraisal process the desk study enabled an effective assessment of the appropriateness of the agreement when compared to county target objectives, as well as the importance of management plans and special projects. There were occasions when the agreement files also contained information relevant to good and bad compliance.

6.24 It may be advantageous for the desk study to be more closely integrated with the agreement holder interview. The desk study could provide the interviewer with information about the agreement and involvement of partners (the ‘what’ questions that would be put to an agreement holder in the absence of information from the agreement file). Using this information, the interviewer could ask associated ‘how and why’ questions which would aid the appraisal process. If this approach were adopted it would justify the apportionment of a single representative on the appraisal panel for the desk study and agreement holder interview. Alternatively, it may be appropriate for the desk study to distance itself from the other means of information gathering so as to remain as objective and impartial as possible. If this is the case then future use of this methodology should consider a separation of the appraisal panel seat for the desk study and agreement holder interview into two distinct roles.

6.25 Face-to-face interviews with agreement holders were an integral data source to the appraisal process, but provided additional benefits because:

- they provided important contextual information on the holding and agreement holder's land management priorities and expertise which would not be easily gained by other methods;
- they provided a deeper insight into implementation and compliance;
- they provided a feed-back route;
- attitudes of agreement holders to the Scheme and environmental issues in general could be explored.

6.26 Alternative approaches would be possible which have the advantages of being cheaper and potentially quicker, but these would need to be weighed against the following limitations:

- telephone - time limited, detailed or sensitive information difficult to collect;
- postal - constraints on types of question, unpredictable response;
- focus groups - can be effective on social issues but in-depth information from individuals is difficult to obtain.

A combination of these might overcome some of the limitations.

6.27 The field survey methodologies proved an effective way of collecting relevant data on the ecological resource, landscape attributes, historical/archaeological resource and access provision for the whole holding independently of any information supplied in the agreement. Using proforma developed specifically for the task and employing trained and experienced specialists enabled these tasks to be completed efficiently and cost-effectively. Little change was required or desirable over the duration of the project, but future modifications would include conducting the ecological survey by Broad and Priority Habitats and conducting more extensive historical/archaeological site visits. The Module 2 survey has shown a range of methodological issues that should be addressed in order to exploit fully the possibilities of interpreting the ecological quality of land under agri-environment schemes. They include:

- the development of appropriate statistics for testing for differences between CS2000 data and agreement land
- further evaluation of the correspondence between Broad and Priority Habitat definitions and the CVS classification

The real value of this study will become apparent if the areas are resurveyed in the future, ideally at the same time as another Countryside Survey; only then will it be possible to judge the ecological value added to agreement land through time. The variable age of the Module 2 agreements has both benefits and disadvantages for analysing the effects of change after any resurvey. The benefits include the ability to detect individual year effects (e.g. the drought of 1995) and the disadvantage is that sample size is reduced for each agreement year.

Considerations for future environmental monitoring methodologies

6.28 The design of future environmental monitoring strategies of the Scheme might consider the following:

- what questions need to be answered by monitoring and evaluation and how can they be integrated?
- the previous section (paras. 6.23-6.28) highlighted a selection of issues relating to the validity of and relationship between particular elements within the monitoring programme. These should be given more detailed reflection prior to any future monitoring work;
- what quantity and quality of information is needed to answer the questions asked with statistical rigour or defensible opinion?;
- given that some agreements, signed in the first year of the Scheme's operation in 1991, will be coming to an end in the near future, consideration should be given to ways in which environmental outcomes of agreements can be effectively measured;
- the ways in which monitoring of the CSS and ESAs may be brought closer together.

Strategies for monitoring the performance of the Scheme

6.29 Consideration should be given to the use of indicators in monitoring the future performance of the Scheme. The concept of indicators is discussed in this section and a list of potential performance indicators relating to the monitoring process undertaken is provided.

6.30 Indicators have become an increasingly important part of environmental policy over the past decade. Their principal purpose is to provide a tool for evaluating the effectiveness of policies at delivering outcomes that meet the policy objectives. In this sense they increase the accountability of public policy. The OECD has defined the main objective of agri-environment performance indicators as assisting:

> "policy makers in their evaluation of current and alternative agricultural and environmental policy measures, by quantifying the relationships between agricultural activities and the environment. Such indicators would help to provide information on positive and negative impacts" (OECD, 1994)

6.31 Indicators are therefore seen as a means to an end rather than an end in themselves because they provide a simplified means of condensing information to decision makers and/or the public.

6.32 There has been much recent discussion regarding the development of suitable indicators relating to sustainable development (DoE, 1994 and 1996; MAFF 1998; DETR, 1999) for both environmental and agricultural policy (MAFF, 1994; OECD, 1997; Brouwer and Crabtree, 1999; Parris, 1998; Moxey *et al,* 1998; FRCA, 1999 and MAFF, 2000). The range of indicators is strongly linked to the type and duration of the policy concerned. Moxey *et al* (1998) identify three types of indicators. First, administrative indicators, which focus on the implementation of a policy and concentrate on matters concerning the process. Second, output or uptake indicators, which measure the through flow of involvement in relation to the objectives of the policy, so are predominantly numeric e.g. length of field margin or area of cultivated land under reversion. Third, outcome indicators, which relate to the final achievements of a policy, are usually calculated against the objectives of that policy, e.g. improve and extend wildlife habitats. MAFF have developed a pilot set of indicators for sustainable agriculture (MAFF, 2000), these focus on the external issues relating to the role of agriculture in achieving sustainable development.

6.33 Any of the performance indicators developed as a result of the environmental monitoring and evaluation of the CSS fall into the category administrative and uptake or output indicators since the remit of the study has been to look at the delivery of the Scheme. All of these indicators are therefore, by definition, quantitative. The Economic Evaluation of Countryside Stewardship (Crabb *et al* 2000) recommends other appropriate output indicators and some outcome indicators that need to be considered. The latter enables a qualitative assessment of the Scheme. The indicators suggested here should be considered alongside those proposed by Crabb *et al* (2000).

Administrative indicators

6.34 The main function of administrative indicators has been as a measure of administrative efficiency. Crabb *et al* (2000) indicate three aspects which have

traditionally been analysed: administrative costs as a proportion of total expenditure; efficiency of processing of applications and potential agreements; and the organisation and operation of CSS. Each of these aspects uses internal data to compare CSS with other MAFF schemes.

Uptake or output indicators

6.35 The traditional measure of ESAs has been uptake targets, most often in the form of percentage of eligible land under agreement. This overall uptake calculation is often supplemented with subsidiary calculations relating to specific types of land or eligible applicants. Such indicators measure actual inputs (area under agreement) in relation to a maximum possible input (total eligible area). This approach may be valid for CSS but the total eligible area is difficult to estimate since the Scheme operates on all land outside ESAs. However, recent work by FRCA mapping participation of CSS by Countryside Character Area is relevant to the role of CSS in managing specific types of eligible land (Askew, 1998).

6.36 Performance indicators for ESAs have recently been published and provide some useful guidance when considering this issue in relation to the Scheme. The review of Stages 1 to 3 ESA targets and objectives has resulted in a greater number of uptake targets with a wider scope (FRCA, 1999). The uptake indicators now include key biodiversity, landscape and historical priorities as well as proportion of eligible land. In this sense they refer to the number of features or length of management option covered and provide a spatial link between different tiers and scheme objectives. As a result each ESA has an overall aim, objectives with links to at least one tier and performance indicators and targets relating to scheme uptake (FRCA, 1999). For example, Objective 1 in the Somerset Levels & Moors ESA is 'to maintain and enhance the nature conservation interest of permanent grassland'. There are three related indicators: the area of grassland under Tier 1, the area of extensive grassland under Tier 1 and the area of grassland designated as SSSI in Tiers 1, 1A, 2 and 3. For each the actual area under agreement is known and a target has been set (FRCA, 1999).

6.37 While uptake indicators are blunt instruments, they do have a useful role to play. For example, they provide comparisons between schemes, across regions and indicate effectiveness, in terms of the promotion of the scheme, associated targets and options, within schemes. Uptake comparisons and expenditure data inform policy makers about the scale of the policy but this may be for a number of reasons, for example the generosity of payments. Uptake indicators also need to indicate the success of the policy over the long-term. This type of indicator can also be developed further in order to provide targets for the administrative processes associated with the scheme. This is explored in the next section.

Potential administrative, uptake and output indicators for CSS

6.38 Administrative, uptake and output indicators are essential for future planning and budgetary purposes. The current work regarding uptake and agreement holder characteristics is becoming increasingly important in shaping the targeting and prioritising process (Askew, 1998).

6.39 The flexibility inherent in the structure of the Scheme (for example the

Scheme offers over 70 management options) makes it more difficult to develop indicators that monitor its effectiveness. The ERDP has opened the possibility of theregional delivery of the Scheme. Should this be implemented, this would enable the adoption of indicators by the Scheme similar to those used in ESAs permitting comparisons between the two major schemes as well as between regions and landscape types.

6.40 One of the identified advantages of the Scheme is its well developed consultative process and resulting 'ownership' among a wide range of partners (Moxey *et al,* 1998). This is achieved through the National Rural Development Forum (formerly the National Agri-Environment Forum) and the regional equivalents. It is therefore crucial that all the indicators are agreed by the partner organisations associated with the Scheme using this inclusive process.

List of prospective administrative, uptake and output indicators

6.41 The following is a list of potential uptake/ administrative indicators for monitoring the future performance of CSS. The indicators have been derived from the findings of the environmental monitoring and evaluation process. Where appropriate a percentage figure has been suggested and, again, these are based on the findings of the environmental monitoring and evaluation process. However, both the indicators and percentages are presented as a basis for discussion.

6.42 Agreement negotiation

Scoring system

- In the majority of cases (75%) the Scheme PO should conduct both the Initial and Full Assessment for each application.

Consultation

- Consultation (e.g. with County Archaeologist) should be conducted on 80% of all cases considered at the Full Assessment stage.
- Consultation should be conducted with the appropriate agency in 95% of cases considered at the Full Assessment stage where statutory designations (e.g. SSSI or SM) are included or adjacent to proposed agreement land.

Missed opportunities

- The Scheme should seek to maintain the level of advice sought by applicants at over 75%. This currently stands at 84% for successful applicants and 77% for unsuccessful applicants (Crabb *et al,* 2000).
- Site visits should be conducted in 98% of applications considered at the Full Assessment stage.

6.43 Appropriateness

Agreement objectives and prescriptions

- Less than 50% of the objectives and management prescription in any one agreement should be taken unaltered from the standard menu.
- The majority of sites (80%) should have objectives for all four areas of the

Scheme.

- Objectives should mention environmental designations or BAP species and habitats where they occur in 75% of cases.

6.44 Environmental Effectiveness

Indicators in this section should be presented according to the objectives attributed to the 12 landscape types in the scheme documentation (MAFF, 1999). For example:

Chalk and Limestone Grassland

- Number of archaeological sites protected by adjusted grazing or scrub control.
- Length of traditional stone wall or hedge restored.
- Area of cultivated land returned to downland.
- Length of grass margin created.

Agreement Management Plans

- Where management plans are mandatory, a management plan should be present on file within 1 year after the signing of the agreement in 75% of cases.

Compliance

- At least 10% of agreements should receive a maintenance visit within three years of signing.

6.45 The preparation required for the identification of effective indicators is evident from the introduction to MAFF's '*Towards Sustainable Agriculture'*, which speaks of a 'long consultative process' and 'the start of a positive debate'(MAFF 2000). Both MAFF (2000) and Moxey *et al* (1998) identify the major issues, which are required when establishing effective performance indicators. In terms of an indicator's effectiveness Moxey *et al* (1998) suggest that it requires acceptance, understanding and legitimacy. MAFF (2000) also identified policy relevance as one the four criteria used in the selection of the 35 indicators listed. The other three criteria were analytical soundness, measurability and appropriate level of aggregation. The importance of measurability and aggregation has been stressed by the NAO who recommended that indicators should be expressed as direct units of measurement (e.g. hectares) rather than percentages (NAO 1997).

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GLOSSARY

AOD	Above Ordinance Datum (Baseline for measurement of height above sea level)
AONB	Area of Outstanding Natural Beauty
BAP	Biodiversity Action Plan
BHS	Biological Heritage Site
BTCV	British Trust for Conservation Volunteers
CA	County Archaeologist
CCRU	Countryside and Community Research Unit
CEH	Centre for Ecology & Hydrology (formerly ITE)
CF	Community Forest
CoCo	Countryside Commission
CSS	Countryside Stewardship Scheme
CVS	Countryside Vegetation System
DMV	Deserted Medieval Village
EA	Environment Agency
EH	English Heritage
EN	English Nature
ERDP	England Rural Development Programme
ESA	Environmentally Sensitive Area
FC	Forestry Commission
FRCA	Farming and Rural Conservation Agency
FWAG	Farm and Wildlife Advisory Group
FWPS	Farm Woodland Premium Scheme
HCO	Heritage Coast Officer
HIS	Hedgerow Improvement Scheme
LA	Local Authority
LNR	Local Nature Reserve
MAFF	Ministry of Agriculture, Fisheries and Food
NCC Phase 1 Classification	A widely used system of habitat classification based on plant species, drawn up by the Nature Conservancy Council
NNR	National Nature Reserve
NP	National Park
NRA	National Rivers Authority (now part of the Environment Agency)
NVC	National Vegetation Classification
PO	Project Officer
RAMSAR	Designation for internationally important wildfowl sites
Red Data Book	The Red Data Books list the rarest and most threatened animals and plants in Britain in internationally agreed categories (published by JNCC)
RoW	Right of Way
RSC	Regional Service Centres (MAFF offices)
RSPB	Royal Society for the Protection of Birds
SAC	Special Area of Conservation
SAM	Scheduled Ancient Monument
SMR	Sites and Monuments Register
SNCI	Site of Nature Conservation Interest
SPA	Special Protection Area
SSSI	Site of Special Scientific Interest
WES	Woodland Enhancement Scheme
WGS	Woodland Grant Scheme
WHS	World Heritage Site
WT	Wildlife Trust
National/international wildlife interest (Table 4.3)	includes any SAC, SPA, SSSI, RAMSAR, BHS or NNR
Local wildlife interest (Table 4.3)	includes any LNR or SNCI (where the existence is known from information available on file)

APPENDIX 1 - EXECUTIVE SUMMARIES OF TOPIC REPORTS AND MODULE 2 REPORT

EDUCATIONAL ACCESS (Code E)

1.1 This report provides an evaluation of educational access agreements within the Countryside Stewardship Scheme (CSS). This evaluation is part of the larger environmental evaluation of the whole scheme being carried out for MAFF by ADAS, CEH and CCRU.

1.2 A sample of 35 educational access agreements signed in 1996 was chosen for evaluation in 1997. The evaluation covered a number of stages:

- a desk study of agreements,
- agreement holder interviews,
- an ecological, landscape, archaeological and access field survey of holdings,
- an appraisal.

1.3 The appraisal was the core of the project, and involved a review and assessment of each sample agreement by a multi-disciplinary team of specialists. Each agreement was evaluated and scored in relation to five criteria:

- agreement negotiation;
- appropriateness;
- environmental effectiveness;
- compliance;
- side effects,

together with an assessment of the additionality and value for money provided by the agreement.

1.4 In contrast to the other topics studied in the first year of the whole scheme evaluation, educational access is not a CSS landscape type, but a CSS 'category'. It remains distinct from landscape types in that it involves the management of the human resource.

1.5 Supplementary work was, therefore, undertaken beyond the appraisal of the 35 agreement sites. This involved the interrogation of a larger 'expanded' sample of

50 agreement sites specifically to identify characteristics of the management of the human resource. This larger sample included the 35 appraisal sites plus 15 additional sites selected from the uplands, watersides and countryside around towns landscape topic study samples (from the first year of the whole scheme evaluation), that also had an educational access component in their agreement. This further work involved three elements: additional desk study analysis; supplementary questions to agreement holders and a telephone interview with organisations that had been identified as users or potential users of the sites.

1.6 This report summaries the results identified from each stage of the project, highlighting the range and distribution of performances for each criterion assessed. The supplementary work is set out separately in all but the final chapter, where recommendations resulting both from information gathered in the appraisal process and the supplementary work are presented together.

1.7 The major results and conclusions of the report from the appraisal process with regard to educational access agreements are:

- Agreements for educational access within the sample were predominantly within the south and south-east of England, with over half (56%) falling into these two regions. Educational access sites had more existing access opportunities than any of the landscape types assessed in the first year of the study of the whole scheme. A third (34%) of the sample sites had a wildlife designation, a quarter (26%) of the sites had some form of landscape designation (predominantly within the boundaries of an Area of Outstanding Natural Beauty) and 9% of the sites had historical and archaeological designations. Nearly a third (31%) of the sample sites had no conservation designation of any type.
- Some 83% of agreement holders were farmers. The proportion of livestock farms within the educational access sample was below that of the whole scheme first year sample (particularly in respect of beef). Half (49%) of the educational access sample of agreement holders were dependent on agriculture as the sole source of income.
- In the educational access agreements, grassland, typically semi-improved or improved/amenity grassland was the most common type of habitat; the number of holdings with semi-improved grassland being greater than that with improved grassland. Arable field margins were also a common focus for educational access. Field boundaries were the most frequently found landscape features, suggesting that the sites tended to be within enclosed landscapes. In some sites historical and archaeological features provided the focus for educational access and, within the sample, three sites had areas designated as Scheduled Ancient Monuments (SAMs).
- With respect to agreement negotiation, Project Officers had had an important role in developing applications and in co-ordinating consultations with outside organisations (which took place in over 90% of agreements). As a result, most educational access agreements had been satisfactorily set up. Whilst on 71% of holdings there were considered to be some missed opportunities in the

making of the agreement (principally in relation to wildlife, landscape and historical features), the majority related to further environmental potential rather than to missed opportunities for averting environmental damage.

- Agreements were generally appropriate but objectives, specifically in relation to educational access, often were vague. Only one agreement had no objectives at all, but five agreements had no objectives relating to access.
- All agreements were considered to be effective. However, where educational access agreements were introduced as an addition to an existing agreement, the relationship between the two was not always clear. The relationship of the agreement to other schemes (present in nearly a third of the sample) was sometimes ambiguous. The consideration of access within the agreement was, in a majority of cases, difficult to judge.
- Compliance was a particularly successful feature of agreements. Agreement holders were in the main content with the agreement and were able and willing to carry it out. The principal uncertainties about compliance resulted from a lack of contextual information about the agreement holder in respect, for example, of technical competence and financial status.
- In all but one case, the side effects of the agreements were deemed to be positive in terms of making a contribution to the landscape and ecology of the wider area in which they were situated. Greater acknowledgement of existing designations within the agreements themselves, however, could have been achieved.
- Additionality, however, was considered to be low in just over half (53%) of the sample, largely because the work would have been undertaken anyway or because the public benefit potential was considered to be limited.

1.8 The major results and conclusions of the report from the additional work with regard to educational access agreements are:

- Only seven of the 50 sites in the expanded sample had prepared a farm information/teachers pack. Of these, four were judged as excellent and the other three good. Few agreement holders had contacted a school before applying for the educational access payment.
- Most agreement holders had received no visits during 1997 and were not well placed to receive any in the following year. Information about the number of visitors to such sites was therefore partial. The majority of agreement holders were experiencing some problems in implementing the agreements and were commonly unsure about where to seek appropriate specialist advice in this regard.
- Reaction to the sites by users (two-thirds of which were primary schools) was positive for a wide variety of reasons and 'things that were enjoyed' were articulated four times as commonly as 'suggested areas for improvement'. Of the latter, infrastructure (particularly toilets and covered teaching areas) was most commonly referred to.

1.9 The major recommendations to improve the implementation of CSS in respect of educational access include:

- Project Officers should ensure that applicants have contacted potential users at agreement negotiation stage and ensure that proper provision is made for the keeping of records of visits.
- A more systematic approach to securing assistance with, and consultation over, the preparation of farm information/teaching packs and other written materials should be considered.
- A more systematic approach to the advertising of sites should be developed.
- Consideration might be given to making the required minimum number of visits per year to sites more transitional over the ten year period.
- Clearer advice in relation to the use of evaluation proformas for monitoring the use of sites by visitors could usefully be developed.

1.10 The major recommendations to improve the scheme in general include:

- A more holistic approach to the integration of CSS agreements with both existing environmental designations and other farm-based environmental schemes might usefully be developed.
- Objectives and management prescriptions might incorporate more detail on the specific characteristics of the holding particularly in relation to the particular category or landscape type into which the agreement falls. Such objectives and prescriptions might also be worded in less technical language. This is particularly important for those entering into agreements from a non-farming background.
- Wider consultation might take place generally with landscape and historical interests since these elements of agreements tend to be considered less fully than those of ecology.
- Cross-compliance features might be more comprehensively marked on agreement maps.

COUNTRYSIDE AROUND TOWNS (Code T)

1.1 This report provides an evaluation of countryside around towns agreements within the Countryside Stewardship Scheme (CSS). This evaluation is part of a larger environmental evaluation of the whole scheme being carried out for MAFF by ADAS, CEH and CCRU.

1.2 A sample of 32 countryside around towns agreements signed between 1991 and 1996 were chosen for evaluation in 1997. Of those sample agreements signed before 1995, 7 were Hedgerow Incentives Scheme agreements, subsequently incorporated into CSS. The evaluation covered a number of stages:

- a desk study of agreements,
- agreement holder interviews,
- an ecological, landscape, archaeological and access field survey of holdings
- an appraisal.

1.3 The appraisal is the core of the project, and involved a review and assessment, of each sample agreement, by a multi-disciplinary team of specialists. Each agreement was evaluated and scored in relation to 5 specific criteria:

- agreement negotiation,
- appropriateness,
- environmental effectiveness,
- compliance and
- side effects,

together with an assessment of the additionality and value for money provided by the agreement.

1.4 The report summarises the results identified from each stage of the project, highlighting the range and distribution of scores for each criterion assessed.

1.5 In drawing out conclusions and recommendations the report addresses both those issues specific to countryside around towns land, as well as those relevant to the whole scheme, but derived from an evaluation of countryside around towns sites. It recommends improvements to the operation of the existing scheme, as well as, where appropriate, strategic improvements to the scheme as a whole.

1.6 The major results and conclusions of the report with regard to countryside around towns agreements are:

- Agreements in the countryside around towns have been taken up by a fairly narrow range of land owners and land managers, with a high proportion of local authority agreement holders, and a high proportion of sites with a primary recreation and amenity interest. The sample chosen was concentrated in the north east and north midlands of England, both on the urban fringe, and wholly within urban settings.

- CSS is generally effective in targeting and protecting habitats in the countryside around towns. The majority of agreements included grassland and field boundaries, with smaller numbers and areas of other habitats such as lowland heath and mire.

- Most countryside around towns agreements were well set up, with good project officer involvement and wide consultation. The report expresses concern that access did not appear to be always fully addressed in the agreement negotiation, where it ought to be a primary consideration in the urban fringe. Equally historic features were not always taken account of, and ridge and furrow grassland in particular was often been overlooked in the application process.

- Countryside around towns agreements were found in the main to be appropriate and feasible, although on occasion (particularly in the early agreements), objectives were limited or entirely absent.

- Agreements were judged generally effective to at least maintain the ecological and landscape interests, with some concern over the effectiveness to maintain the historical interest.

- The report commends the positive role of project officers in producing workable agreements in areas subject to problems of rustling, vandalism and trespass. Achieving this has often required flexibility in the use of prescriptions and the need to seek a balance between practicality and environmental effectiveness. One example of this is the use of hay meadow prescriptions by local authorities to enable an annual cut of grassland, used essentially for amenity. Such flexibility should be encouraged.

- The appraisal team had concerns about the grazing of horses on agreement land, which requires careful consideration to avoid grazing damage or poaching. Another concern was the effect of vandalism, compromising the ability of agreement holders to fully comply.

- Compliance was judged highly likely in the majority of agreements, although there was concern over the technical competence of some agreement holders, and over inconsistencies in the identification of cross-compliance features.

- Additionality and value for money on countryside around towns sites was found to be generally high, with good public benefit due largely to the location of most sites close to centres of population.

1.7 The major recommendations to improve the implementation of the scheme in countryside around towns areas include:

- The need for access to be a primary consideration of agreement negotiation.

- The need for more historic landscape input into agreement negotiation.

- The need to ensure that, where horse grazing is allowed on agreement land, grazing prescriptions are provided, which are clear and unambiguous to the agreement holder.

- At a strategic level, consideration should be given to the allowance of additional costs for work repeated as a result of vandalism.

1.8 The major recommendations to improve the scheme in general include:

- The need for Project Officers to take the lead in promoting a more holistic approach to joint applications to CSS and other schemes.

- A detailed work programme should be provided for each agreement holder, setting out both the capital and annual management work required.

- The need to consider the inclusion of broad-leaved woodland as an eligible environmental feature for CSS.

- The need to consider the inclusion in the scheme of a training element, for agreement holders, to help improve their technical competence.

- At the strategic level the report suggests the need to consider a standard and consistent approach to marking all cross-compliance features onto agreement maps.

UPLAND (Code U)

1.1 This report provides an evaluation of upland agreements within the Countryside Stewardship Scheme (CSS). This evaluation is part of a larger environmental evaluation of the whole scheme being carried out for the Ministry of Agriculture Fisheries and Food (MAFF) by ADAS, CEH and CCRU.

1.2 A sample of 46 upland agreements signed in 1996 were chosen for evaluation in 1997. The evaluation covered a number of stages:

- a desk study of agreements,
- agreement holder interviews,
- an ecological, landscape, archaeological and access field survey of holdings
- an appraisal.

1.3 The appraisal is the core of the project, and involved a review and assessment, of each sample agreement, by a multi-disciplinary team of specialists. Each agreement was evaluated and scored in relation to 5 specific criteria:

- agreement negotiation,
- appropriateness,
- environmental effectiveness,
- compliance and
- side effects,

together with an assessment of the additionality and value for money provided by the agreement.

1.4 The report summarises the results identified from each stage of the project, highlighting the range and distribution of scores for each criterion assessed.

1.5 In drawing out conclusions and recommendations the report addresses both those issues specific to the uplands, as well as those relevant to the whole scheme, but derived from an evaluation of upland sites. It recommends improvements to the operation of the existing scheme, as well as, where appropriate, strategic improvements to the scheme as a whole.

1.6 The major results and conclusions of the report with regard to upland Stewardship agreements are:

- Upland sample agreements are concentrated in the north of England. Average height above sea level of agreement land is 253m AOD.

- As many as 85% of upland agreement holders are agricultural, with livestock farms predominating. The majority of holdings include grassland or rough grazings in agreement, with surprisingly little heathland present. The majority of agreements also include field boundary maintenance, on walls and hedgerows.

- Most upland agreements were well set up, with good Project Officer involvement and wide-ranging consultation. The report expresses concern at the number of missed opportunities, particularly for historical and archaeological features, some of which were felt to be under threat of damage.

- Upland agreements had generally appropriate and feasible objectives, and management prescriptions. There was concern particularly over the appropriateness of access objectives, which were often very general, and largely unsupported by detailed management prescriptions. There was also concern that agreements with a historical interest did not have historical objectives.

- The appraisal team felt that flexibility in the use of management prescriptions should be encouraged, such as, for example, the use of lowland heath prescriptions to manage upland heather moor. The report expresses some concern that existing prescriptions do not cover important upland habitats such as raised bog, and that the use of a single common rebuilding style for walls was leading to the risk of some inappropriate wall restoration.

- Agreements were judged generally effective to maintain and probably enhance the ecological and landscape interest of most sites, but less so for the historical and archaeological interest, and for access. There were some concerns over the effectiveness of prescriptions to recreate diverse meadows through grazing management, which were judged unlikely to be successful unless more intervention in the form of reseeding was carried out.

- Compliance was judged highly likely in the majority of upland agreements, although there was concern over inconsistencies in the identification of cross-compliance features.

- There were few side effects identified in upland areas, and those few were generally positive.

- Additionality and value for money on upland sites was found to be variable.

1.7 The major recommendations to improve the implementation of the scheme in upland areas include:

- The need for more historic landscape and archaeological input into agreement negotiation in upland areas.

- The need to always consider access opportunities to upland agreement land. This could be supported by the inclusion of improved access as a scheme objective in the uplands.

- The need to have more flexibility in the style of restoration of upland walls, coupled with a need to identify the source of stone used in such restorations.

- The need to redraft prescriptions for hay meadow management, together with hay meadow cutting regimes.

- The need to encourage the use of nutrient stripping and reseeding in the creation of wildflower meadows, as well as encouraging the greater use of prescriptions to prevent rabbit damage, and to prevent the spreading of manure onto fields designed to reduce fertility.

- At the strategic level, to provide new management prescriptions for raised bog, individual trees and tree lines, as well as to address the issue of a lack of skilled stone walling contractors in the uplands.

1.8 The major recommendations to improve the scheme in general include:

- The need to ensure that all important environmental interests on the holding are always taken into account in both agreement negotiation, and subsequently in the agreement objectives set.

- The need to improve the written language of agreements, especially for non-technical agreement holders, and for access objectives and prescriptions.

- The need to avoid continuing agricultural intensification, and the increase of stocking levels on the non agreement area of the holding, especially if it is likely to affect high quality habitats not in agreement.

- At the strategic level, the report suggests the need to consider a standard and consistent approach to marking all cross-compliance features onto agreement maps, and to the mapping of other environmentally designated areas.

WATERSIDE (Code W)

1.1 This report provides an evaluation of waterside agreements within the Countryside Stewardship Scheme (CSS). This evaluation is part of a larger environmental evaluation of the whole scheme being carried out for Ministry of Agriculture Fisheries and Food (MAFF) by ADAS, CEH and CCRU.

1.2 A sample of 42 waterside agreements signed in 1996 were chosen for evaluation in 1997. The evaluation covered a number of stages:

- a desk study of agreements,
- agreement holder interviews,
- an ecological, landscape, archaeological and access field survey of holdings
- an appraisal.

1.3 The appraisal is the core of the project, and involved a review and assessment, of each sample agreement, by a multi-disciplinary team of specialists. Each agreement was evaluated and scored in relation to 5 specific criteria:

- agreement negotiation,
- appropriateness,
- environmental effectiveness,
- compliance and
- side effects,

together with an assessment of the additionality and value for money provided by the agreement.

1.4 The report summarises the results identified from each stage of the project, highlighting the range and distribution of scores for each criterion assessed.

1.5 In drawing out conclusions and recommendations the report addresses both those issues specific to waterside land, as well as those relevant to the whole scheme, but derived from an evaluation of waterside sites. It recommends improvements to the operation of the existing scheme, as well as, where appropriate, strategic improvements to the scheme as a whole.

1.6 The major results and conclusions of the report with regard to waterside CSS agreements are:

- Waterside agreements have been taken up by a diverse range of land owners and land managers, mostly farming, with livestock farms predominating. They are widely distributed throughout England, but largely in lowland situations.

- The majority of holdings include wet grassland in agreement, either as hay meadow, grazing pasture, water meadow or marshland. The majority of agreements also include hedgerow maintenance, and capital items such as tree planting or pond restoration.

- Most waterside agreements were well set up, with good Project Officer involvement and wide-ranging consultation. The report expresses some concern that the landscape and historic interest was not always fully taken account of in the agreement negotiation process, and occasionally important environmental opportunities were missed.

- Waterside agreements had generally appropriate and feasible objectives and management prescriptions. There was however some concern about the standard of wording of agreements, and the fact that environmental designations are rarely mentioned in agreement objectives.

- The majority of waterside agreements do contain important waterside habitats. Agreements were judged generally effective to maintain and probably enhance the environmental interest of most sites, although there were concerns over the grazing of horses and some of the prescriptions used to recreate grassland.

- Many waterside agreements are technically complex, involving, for example, water level management, or the use of innovative methods in seeking to re-create waterside habitat previously destroyed. The appraisal team felt this should be encouraged, but it does put greater emphasis on the Project Officer to identify appropriate prescriptions, and ensure the agreement holder is capable to undertake the work. In these cases a detailed management plan, in comparison to those agreements without, provides evidence of a detailed and systematic approach to the work proposed.

- Compliance was judged highly likely in the majority of waterside agreements, although there was concern over inconsistencies in the identification of cross-compliance features.

- There were often positive side effects from agreements in waterside areas through decreasing fertiliser input to watercourses, or by strengthening the environmental importance of a wider area such as a river valley, both of which are to be

encouraged.

- Additionality and value for money on waterside sites was found to be variable. Small, but nationally scarce waterside habitats such as alder carr and fen, often had high additionality as they remain under continuing threat of damage.

1.7 The major recommendations to improve the implementation of the scheme in waterside areas include:

- The need to take full account of all interests in setting up the agreement, and address all important environmental features on each holding.

- The need for Project Officers to make more use of ditch restoration prescriptions, and provide detail in the agreement of tree planting proposals.

- The need, for more complex agreements, to ensure that the work is within the competence of agreement holder to carry out, and to encourage wherever possible a detailed supporting management plan.

- The need particularly to encourage into agreement small but nationally scarce waterside habitats such as fen, alder carr and osier beds. These are habitats particularly under threat, and where additionality and value for money is especially high.

- At the strategic level, the need to provide new management prescriptions for tree lines, as important waterside landscape features.

1.8 The major recommendations to improve the scheme in general include:

- The need to improve the written language of agreements, especially for non-technical agreement holders.

- The need to identify both other agri-environmental scheme agreements and environmental designations in the objectives of new CSS agreements.

- The need to specify grazing prescriptions for horses where they are used as part of grazing management.

- The need to avoid continuing agricultural intensification, and especially the increase of stocking levels, on the non-agreement part of the holding, if it is likely to affect high quality habitats not in agreement.

- At the strategic level, the report suggests the need to consider a standard and consistent approach to marking all cross-compliance features onto agreement maps, together with a more formal procedure to trigger new discussion at a future date on features flagged as targeted for future agreements.

COASTAL (Code C)

1.1 This report provides an evaluation of coastal agreements within the Countryside Stewardship Scheme (CSS). This evaluation is part of a larger environmental evaluation of the whole scheme being carried out for the Ministry of Agriculture Fisheries and Food (MAFF) by ADAS, CEH and CCRU.

1.2 A sample of 34 coastal agreements signed in 1996 and 1997 were chosen for evaluation in 1998. The evaluation covered a number of stages:

- a desk study of agreements,
- agreement holder interviews,
- an ecological, landscape, archaeological and access field survey of holdings,
- an appraisal.

1.3 The appraisal is the core of the project, and involved a review and assessment, of each sample agreement, by a multi-disciplinary team of specialists. Each agreement was evaluated and scored in relation to 5 specific criteria:

- agreement negotiation,
- appropriateness,
- environmental effectiveness,
- compliance, and
- side effects,

together with an assessment of the additionality and value for money provided by the agreement.

1.4 The report summarises the results identified from each stage of the project, highlighting the range and distribution of scores for each criterion assessed.

1.5 In drawing out conclusions and recommendations the report addresses both those issues specific to the coastal, as well as those relevant to the whole scheme, but derived from an evaluation of coastal sites. It recommends improvements to the operation of the existing scheme, as well as, where appropriate, strategic improvements to the scheme as a whole.

1.6 The major results and conclusions of the report with regard to coastal Stewardship agreements are:

- Coastal sample agreements are concentrated in the south west of England, on the South Devon coast in particular.

- Fewer than 50% of agreement holders were classified as agricultural, with the predominant farmed use being livestock including dairying and associated arable land. Many agreement holders were voluntary bodies, technically non-agricultural, although the land is often tenanted, and used for agriculture. The majority of holdings include grassland or arable winter stubble in agreement, with surprisingly little dune, saltmarsh and reedbed present. The majority of agreements also include field boundary maintenance, on banks and hedgerows.

- Most coastal agreements were well set up, with good Project Officer involvement and wide-ranging consultation. However, the report expresses concern at the number of missed opportunities, particularly for wildlife habitats and landscape features, some of which were felt to be under threat of damage. There were also concerns that access and historic opportunities were not fully addressed on agreements.

- Coastal agreements had generally appropriate and feasible objectives, and management prescriptions. There was concern particularly over the appropriateness of access objectives, which were often very general, and largely unsupported by detailed management prescriptions. There was also concern that some agreements did not have objectives which met those of the scheme for coastal areas.

- The report expresses some concern that some existing prescriptions are too general to cover important feature restoration issues. For example the use of a single common rebuilding style for walls and banks, rather than specifying the vernacular, has on a few sites been assessed as leading to the risk of some inappropriate bank restoration.

- Agreements were judged generally effective to maintain and probably enhance the ecological and landscape interest of most sites, but less so for the historical and archaeological interest, and for access.

- There were some concerns over the effectiveness of prescriptions to recreate grassland through re-seeding with the wrong seed mixes for the location.

- Compliance was judged highly likely in the majority of coastal agreements, although there was concern over inconsistencies in the identification of cross-compliance features.

- There were few side effects identified in coastal areas, and those few, such as on C20 where the new agreement linked with an existing CSS agreement, were generally positive.

- Additionality and value for money on coastal sites were found to be variable, but generally high to medium.

1.7 The major recommendations to improve the implementation of the scheme in coastal areas are:

- The need for more emphasis to be placed on the historic landscape and archaeological component of agreement negotiation in coastal areas.

- The need always to give access opportunities due consideration on coastal agreement land, particularly as a scheme objective in the coastal areas is to encourage access.

- The need to have customised specifications relating to the style of feature restoration including hedges, walls, banks and Devon and Cornish banks. This is coupled with a need to identify the source of stone and the styles used in such restorations.

- The need to provide specific information on the species of trees to be planted in hedge and tree planting programmes.

- At a strategic level, the need to consider a review of scheme objectives for coastal areas, as well as the need to provide easily available prescriptions for key regional variations of field boundary types.

1.8 The major recommendations to improve the scheme in general include:

- The need to ensure that agreement files accurately record details of the negotiation process.

- The need to ensure that all important environmental interests on the holding are always taken into account in both agreement negotiation, through appropriate consultation especially with statutory and formal consultees.

- The flexibility in the use of management prescriptions should be encouraged, such

as, for example, the use of lowland heath prescriptions to manage grazing in coastal scrub and woodland on cliffs.

- The need to improve the written standards of agreements, and for better cross-referencing to agreement maps.

- The need to improve the wording of access objectives, matched by appropriate management prescriptions.

- The need to encourage the provision of management plans, particularly on complex sites.

- The need to review the priority of agreements that only maintain land of poor ecological quality.

- At the strategic level, the report suggests the need to consider a standard and consistent approach to marking all cross-compliance features onto agreement maps, and to the mapping of other environmentally designated areas.

CALCAREOUS GRASSLAND (Code G)

1.1 This report provides an evaluation of calcareous grassland agreements within the Countryside Stewardship Scheme (CSS). This evaluation is part of a larger environmental evaluation of the whole scheme being carried out for the Ministry of Agriculture Fisheries and Food (MAFF) by ADAS, CEH and CCRU.

1.2 A sample of 50 calcareous grassland agreements signed in 1997 were chosen for evaluation in 1998. The evaluation covered a number of stages:

- a desk study of agreements,
- agreement holder interviews,
- an ecological, landscape, archaeological and access field survey of holdings,
- an appraisal.

1.3 The appraisal is the core of the project, and involved a review and assessment, of each sample agreement, by a multi-disciplinary team of specialists. Each agreement was evaluated and scored in relation to 5 specific criteria:

- agreement negotiation,
- appropriateness,
- environmental effectiveness,
- compliance, and
- side effects,

together with an assessment of the additionality and value for money provided by the agreement.

1.4 The report summarises the results identified from each stage of the project, highlighting the range and distribution of scores for each criterion assessed.

1.5 In drawing out conclusions and recommendations, the report addresses issues specific to areas of calcareous grassland, as well as those relevant to the whole scheme but derived from an evaluation of calcareous grassland sites. It recommends improvements to the operation of the existing scheme, as well as, where appropriate, strategic improvements to the scheme as a whole.

1.6 The major results and conclusions of the report with regard to calcareous grassland Stewardship agreements are:

- Calcareous grassland sample agreements are spread evenly across England but are absent from areas designated as ESAs. The sample is represented in all RSCs with the exception of the South West. The average holding was 110.5 hectares in size with an average agreement area of 20.1 hectares.

- Eight-two percent of calcareous grassland agreement holders are agricultural, with livestock farms predominating. The majority of holdings include the management of pastures and meadows, with a number for grassland re-creations on cultivated land. The majority of agreements also included field boundary maintenance, of walls and hedgerows.

- Most calcareous grassland agreements were well set up, with good Project Officer involvement and wide-ranging consultation. However, consultation with statutory agencies was not as wide-spread as it should have been. The report expresses concern at the number of missed opportunities for ecological, landscape and historical and archaeological features, a few of which were felt to be under threat of damage from continuing agricultural practices and in some cases prescriptions associated to the agreement such as tree planting.

- Calcareous grassland agreements had generally appropriate and feasible objectives and management prescriptions. There was concern particularly over the appropriateness of access objectives, which often only reiterated the legal obligation of landowners. There was also concern that agreements with a historical interest did not have sufficiently detailed historical objectives.

- There needs to be a clearer link between the objectives and the management prescriptions to ensure that the former is achievable and the latter is targeted. This was important for matters such as stock density and timing of grazing as well as tree planting and wall restoration. The menu approach of selecting management prescriptions may encourage Project Officers to use standard prescriptions where a more flexible approach would benefit individual sites.

- Agreements were judged generally effective to maintain and probably enhance the ecological and landscape interest of most sites, but less so for the historical and archaeological interest, and for access. There were some concerns over the effectiveness of prescriptions to restore diverse meadows by adjusting the timing and amount of grazing or cutting. The impact of such approaches were unlikely to be successful and consideration of a more interventionist approach, such as introducing wild flower plants or seed, may be more appropriate. The methods currently used in the recreation of downland on cultivated land may not be the most cost effective and should be reassessed against the latest research, including the adjusted prescriptions used on ESAs since 1997.

- Compliance was judged highly likely in the majority of calcareous grassland agreements, although there was concern over inconsistencies in the identification of cross-compliance features and the likelihood of locating a qualified dry stone waller.

- There were few side effects identified in calcareous grassland areas, but these were generally positive. Most often this included the grouping of CSS agreements or the proximity to other environmental designations.

- Additionality and value for money on calcareous grassland sites were found to be variable. On most sites the scheme ensured that the work would be completed to a high standard, over a shorter time period with visible benefits to the public. However, on a significant number of sites much of the work would have been undertaken without the scheme and there was little benefit for the public.

1.7 The major recommendations to improve the implementation of the scheme in calcareous grassland areas include:

- The need for a more rigorous approach when considering historic landscape and archaeological interests during agreement negotiation in calcareous grassland areas.

- The inclusion of improved and semi-improved grassland should not be considered a priority for calcareous grassland unless more interventionist management prescriptions are to be used. The only exception would be the use of such pasture for buffering or linking existing habitats of environmental value.

- At the strategic level, the need to encourage the use of nutrient stripping (cutting vegetation and removing aftermath to draw out nitrogen) and reseeding (minimising soil disturbance and using local provenance seed) in the creation of wildflower meadows, as well as greater detail in the prescriptions for recreation.

- Consideration should be given to including a separate objective relating to the importance of calcareous grassland to historical and archaeological features.

- The focus of calcareous grassland agreements should be the maintenance and enhancement of chalk and limestone grassland rather than the field boundaries associated with these habitats.

1.8 The major recommendations to improve the scheme in general include:

- A stronger mechanism to ensure that relevant statutory agencies are consulted concerning the impact of the application on statutory environmental designations present within or adjacent to the proposed agreement land.

- Current mechanisms assume the SMR to be a reliable source of information regarding historical and archaeological features. Such an assumption is inaccurate and the limitations of the SMR need to be recognised. Adjustments to the procedures need to be made to ensure that historical and archaeological features absent from the SMR but present on agreement land are not damaged.

- The need to ensure that all important environmental designations and interests on the holding are always taken into account in both agreement negotiation, and subsequently in the agreement objectives set.

- At the strategic level, the report suggests that where an applicant is refused some indication should be given of what would be required for the application to be accepted, including if this is potential unlikely, and who may assist in the preparation of the second application.

- There is a need to consider a standard and consistent approach to marking all cross-compliance features onto agreement maps, and to the mapping of other environmentally designated areas.

LOWLAND HEATH (Code H)

1.1 This report provides an evaluation of lowland heath agreements within the Countryside Stewardship Scheme (CSS). This evaluation is part of a larger environmental evaluation of the whole Scheme being carried out for the Ministry of Agriculture Fisheries and Food (MAFF) by ADAS, CEH and CCRU.

1.2 A sample of 32 lowland heath agreements signed in 1997 were chosen for evaluation in 1998. The evaluation covered a number of stages:

- a desk study of agreements;
- agreement holder interviews;
- an ecological, landscape, archaeological and access field survey of holdings;
- an appraisal.

1.3 The appraisal is the core of the project, and involved a review and assessment, of each sample agreement, by a multi-disciplinary team of specialists. Each agreement was evaluated and scored in relation to 5 specific criteria:

- agreement negotiation;
- appropriateness;
- environmental effectiveness;
- compliance; and
- side effects.

together with an assessment of the additionality and value for money provided by the agreement.

1.4 The report summarises the results identified from each stage of the project, highlighting the range and distribution of scores for each criterion assessed.

1.5 In drawing out conclusions and recommendations, the report addresses both those issues specific to lowland heath, as well as those relevant to the whole Scheme, but derived from an evaluation of lowland heath sites. It recommends improvements to the operation of the existing Scheme, as well as, where appropriate, strategic improvements to the Scheme as a whole.

1.6 The major results and conclusions of the report with regard to lowland heath Stewardship agreements are:

- Lowland heath sample agreements are randomly spread throughout areas of England where lowland heath, dry grass heath and bracken on lowland acid soils are found but which are not already covered by ESAs such as Breckland. The sample did not include any agreements that fell within ESAs. Average height above sea level of agreement land is 105m AOD.

- Only 31% of lowland heath agreement holders had agricultural enterprises whilst 47% were either voluntary bodies or local authorities. This was probably because most lowland heath is not "farmed" and is also owned by non-farmers.

- Most lowland heath agreements were well set up, with good Project Officer involvement and wide-ranging consultation. The report expresses concern at the number of missed opportunities both on the lowland heath itself and also on land not on the heath but on the same holding.

- Lowland heath agreements had, in most cases, appropriate and feasible objectives, and management prescriptions. Management plans were especially important in producing clear objectives and management prescriptions.

- Agreements were judged generally very likely to maintain and probably enhance the ecological and landscape interest of most sites, but less likely for the historical and archaeological interest. As a lot of lowland heath already has good access, enhancement was not expected in many cases.

- Compliance was judged highly likely in the majority of lowland heath agreements.

- There were few side effects identified in lowland heath areas, and those few were generally positive. Side effects were varied but increased connectivity was a common positive side effect.

- Additionality and value for money on lowland heath sites was found to be variable but in the large majority of cases was *high* or *medium*.

1.7 The major recommendations to improve the implementation of the Scheme in lowland heath areas are:

- An archaeological appraisal or survey should be carried out before soil stripping is recommended as an aid to heathland regeneration, in addition to consultation with the County Archaeologist.

- There is a need for more guidance on historic landscapes and archaeology during agreement negotiation in lowland heath areas.

- There must be some flexibility in the definition of lowland heath so that moorland that is just below the upper altitude limit of lowland heath is not called lowland heath but is classified as moorland. This could be achieved by changing the definition to include soils and species composition.

- A formal link with research organisations should be put in place so that Project Officers are kept fully up to date with research on lowland heath management and restoration.

- The lowland heath landscape type could be subdivided into: true lowland heath; dry acid grassland; lowland bracken and forestry. This would provide a clearer picture of the type of land in agreement and not give a false impression of the extent of lowland heath in England. The proposed sub-division has implications for the management prescriptions for lowland heath that should be altered to reflect the differences between the sub-divisions. The definitions of lowland heath and moorland should be altered to include soils and species composition.

1.8 The major recommendations to improve the Scheme in general are:

- The need to ensure that all important environmental interests on the holding are always taken into account in the agreement negotiation, and subsequently in the agreement objectives set.

- The need to improve the written language of agreements, especially for non-technical agreement holders, and for access objectives and prescriptions.

- At the strategic level, the report suggests the need to consider a standard and consistent approach to marking all cross-compliance features onto agreement maps, and to the mapping of other environmentally designated areas.

- The use of management plans has made some of the agreements more focused, clearer and deliverable. All but the simplest agreements should have a management plan.

- Project Officers must check that management plans cover all aspects of the Scheme on the lowland heath (ecology, landscape, history and access) and not just the area of expertise of the authors of the management plan e.g. wildlife.

HISTORIC LANDSCAPE (Code P)

1.1 This report provides an evaluation of historic landscape agreements within the Countryside Stewardship Scheme (CSS). This evaluation is part of a larger environmental evaluation of the whole scheme being carried out for the Ministry of Agriculture Fisheries and Food (MAFF) by ADAS, CEH and CCRU.

1.2 A sample of 48 historic landscape agreements signed between 1993 and 1997 were chosen for evaluation in 1998. The evaluation covered a number of stages:

- a desk study of agreements;
- agreement holder interviews;
- an ecological, landscape, archaeological and access field survey of holdings;
- an appraisal.

1.3 The appraisal is the core of the project, and involved a review and assessment of each sample agreement, by a multi-disciplinary team of specialists. Each agreement was evaluated and scored in relation to five criteria:

- agreement negotiation;
- appropriateness;
- environmental effectiveness;
- compliance; and
- side effects;

together with an assessment of the additionality and value for money provided by the agreement.

1.4 The report summarises the results identified from each stage of the project, highlighting the range and distribution of scores for each criterion assessed.

1.5 In drawing out conclusions and recommendations the report addresses both those issues specific to historic landscapes, as well as those relevant to the whole scheme, but derived from an evaluation of historic landscape sites. It recommends improvements to the operation of the existing scheme, as well as, where appropriate, strategic improvements to the scheme as a whole.

1.6 The major results and conclusions of the report with regard to historic landscape agreements are:

- Historic landscape agreements range widely in size and are well distributed throughout England. They occur on holdings which are often part of much larger estates, and include medieval deer parks and more recently designed parklands. All except one of the sample agreements was for land which had a parkland history or was in association with parkland. The majority of the agreement holders were 'non-agricultural', including charitable trusts. The agricultural agreement holders were mostly owner-occupiers of mixed farming enterprises.

- The holdings monitored were found to be of considerable landscape significance with layers of archaeological and historical interest that pre and post date the designed parkland itself. Ecological interest was more limited and often confined to old parkland trees.

- The majority of agreements generally involved grassland management, or arable reversion, together with tree management, tree planting, and access provision.

- Most historic landscape agreements were well set up, with good Project Officer involvement. However, insufficient statutory or formal consultation took place in some cases; such consultation is a requirement of the scheme. The report expresses concern at the number of missed opportunities, as agreements did not always fully acknowledge the historical and archaeological importance of the sites involved.

- Most agreements had one or more objectives and these were generally appropriate and feasible. There was concern that the scheme objectives for historic landscapes were sometimes unclear. Management prescriptions were often very limited for capital works, such as tree planting and management and access provision.

- Agreements were judged generally effective to maintain the ecological, landscape and archaeological interest, but enhancement was largely limited to the landscape and 'historical landscape' interest. It was felt that many agreements viewed historic landscapes primarily as designed parklands, not reflecting sufficiently the archaeological interest. There were also some conflicts identified relating to tree planting on sites of archaeological interest. For ecological enhancement, it was felt that prescriptions chosen to increase grassland botanical diversity were unlikely to achieve the desired effect without more interventionist management and attention to the seed mixes used. Management plans were generally good, but were often poorly linked to and poorly referenced to, the actual agreement.

- Compliance was judged highly likely in the majority of agreements. However, there were concerns over the commitment of some agricultural tenants and the technical competence of some non-agricultural agreement holders.

- There were few side effects identified in historic landscape agreements, and those few were generally positive. Agreements were set up in a way which tended to complement existing CSS agreements environmental designations or valuable sites. Benefits were gained from the heightened awareness of some land owners of environmental issues. There were cases of land owners encouraging others to join the scheme and examples of the incidental protection of valuable habitats.

- Most agreements were assessed as offering a 'medium' level of additionality and value for money. Some work that the agreements supported would have been done anyway, but not to the same scale or standard. Environmental damage was prevented and sites offered reasonable public benefit in terms of access and visibility.

1.7 The major recommendations to improve the implementation of the scheme in historic landscape areas include:

- The need for more historic and archaeological input into historic landscape agreements, both in terms of historic survey, consultation with outside organisations, and better training for Project Officers. This can be achieved to some extent by the encouragement of the use of restoration plans, providing the brief for undertaking such a plan is clear and comprehensive and the relevant expertise is made available.

- The requirement for all historic landscape agreements to have a management plan should be met.

- The need for agreements to include detail of, and where possible specifications for, capital items, tree management and tree planting (all typical management items in historic landscape areas). Detail of tree planting is particularly important to minimise the risk of damage to known sites of archaeological interest and to ensure the suitability of proposals. Old parkland trees and small copses should be protected with specific management prescriptions.

- Whilst a number of agreements do have access provision, it was felt that new, imaginative, site specific access proposals should be encouraged in historic landscape areas. These should have prescriptions to show how such access would be achieved.

- For some agreements access provision under the scheme may not be appropriate. This could be because a suitable level of provision already exists, because increased access could damage the historical resource, or because the security or privacy of the landowner would be unreasonably compromised. Reasons for not including access provision in a scheme need to be fully recorded as part of the

agreement negotiation process.

- At the strategic level, the report suggests the need to revise scheme objectives for historic landscapes, to clarify the distinction between historic landscapes and historic parkland, and make sure that all cross-compliance features are marked on agreement maps. In historic landscapes, individual trees, tree lines and small copses are especially important features and cross-compliance should be extended to cover all these.

1.8 The major recommendations to improve the scheme in general include:

- The need to consider a slightly wider role for the Project Officer, to provide more contact post-agreement, to provide contract management advice, and perhaps to act in a nominated role, in co-ordinating discussions with some of the larger organisations putting in multiple CSS applications.

- The need to ensure that all statutory and formal consultations are carried out, and to ensure that where consultee advice is not followed, that a justifiable reason is added to the agreement file.

- The need to avoid over-reliance on standard clauses and guidance notes in agreements, unless these are suitably adapted to the specific needs of the particular site concerned.

- The need to ensure that management plans are attached to CSS agreements and that they are adequately linked and properly referenced to the agreement.

- The need to pay attention to the management of arable reversion and arable field margins, in particular, to the seed mixes proposed, in order to achieve a better likelihood of successful grassland re-creation.

- The need to consider the priority for including improved and semi-improved grassland in agreement, unless accompanied by more interventionist management prescriptions.

- The need to avoid continuing agricultural intensification, the increase of stocking levels and the neglect of field boundaries on the non agreement area of the holding, especially if this is likely to affect high quality habitats, landscapes or historical sites.

- At the strategic level the report suggests the need to consider clearly cross-referencing and dating all documents relevant to the agreement.

- The report suggests the need to consider including within a tree or boundary management programme the ability to fund the removal of visually intrusive landscape features, such as inappropriate tree planting or fencing, that may not be normally categorised as ‘eyesores’. Equally where there is flexible use of the scheme to the benefit of the agreement, this positive approach should be documented for future reference and interpretation.

ARABLE MARGIN (Code A)

1.1 This report provides an evaluation of arable margin agreements within the Countryside Stewardship Scheme (CSS). This evaluation is part of a larger environmental evaluation of the whole scheme being carried out for the Ministry of Agriculture Fisheries and Food (MAFF) by ADAS, CEH and CCRU.

1.2 A sample of 51 arable margin agreements signed in 1998 were chosen for evaluation in 1999. The evaluation covered a number of stages:

- a desk study of agreements;
- agreement holder interviews;
- an ecological, landscape, archaeological and access field survey of holdings;
- an appraisal.

1.3 The appraisal is the core of the project and involved a review and assessment of each sample agreement by a multi-disciplinary team of specialists. Each agreement was evaluated and scored in relation to five criteria:

- agreement negotiation;
- appropriateness;
- environmental effectiveness;
- compliance;
- side effects.

The evaluation also included an assessment of the additionality and value for money provided by the agreement.

1.4 The report summarises the results identified from each stage of the project, highlighting the range and distribution of scores for each criterion assessed.

1.5 In drawing out conclusions and recommendations, the report addresses both those issues specific to arable margins, as well as those relevant to the whole Scheme but derived from an evaluation of arable margin sites. Although the Scheme is apparently providing good quality agreements and is expected to deliver good environmental benefits for arable margins, this report recommends improvements to the operation of the Scheme, as well as, where appropriate, strategic improvements to the Scheme as a whole.

1.6 The major results and conclusions of the report with regard to arable margin agreements are:

- Arable margin agreements range widely in size and are well distributed throughout England although there were notable gaps in Lincolnshire and Essex. There were greater lengths of margins in the Reading, Bristol and Cambridge MAFF Regional Service Centre (RSC) areas than the others. There were 1.7 times more 6 km margins than 2 km margins in the sample.
- The holdings monitored were found to be of ecological significance. Landscape interest of the management prescribed in the agreements was often more limited and confined to the enhancement of hedgerows. Historical interest was also limited and rarely affected by the margins themselves as the historical features were not near the margins of the field. In most cases the historical features were not of a sort that could be protected by the Scheme as they had already been mostly plough damaged.
- The vast majority of agreements involved the creation and management of arable margins and the management of boundaries. Grassland management and arable reversion, together with tree management, tree planting, and access provision, were also common.
- Most arable margin agreements were well set up, with good Project Officer involvement. However, insufficient statutory or formal consultation took place in some cases despite being a requirement of the Scheme. The report suggests that the majority of agreements had minor missed opportunities, which if recognised would improve the effectiveness of the Scheme.
- All agreements had one or more objectives and these were generally appropriate and feasible. There was concern that the standard of the objectives was very variable. Many were very good, addressing all or most of the management to be done, but a few were very poor and did not address different aspects of the work to be done.
- Agreements were judged to be generally very effective in their potential to maintain the ecological and landscape interest, and to a lesser extent archaeological interest. Enhancement due to agreements was largely limited to the ecology of the field margins and more especially to fauna. For botanical enhancement, it was felt that prescriptions for sowing grass margins were not sufficient. Agreements of this landscape type rarely had or needed management plans.
- Compliance was judged highly likely in the majority of agreements and full compliance was thought likely in many cases. There were concerns that some contractors and tenants may not be fully committed to or aware of the Scheme and its requirements.
- There were few side effects identified in arable margin agreements, and those few were generally positive. Agreements were largely set up in a way which complemented existing CSS agreements, environmental designations or valuable sites. Benefits were gained from the heightened

awareness of some land owners of environmental issues. There were cases of land owners encouraging others to join the Scheme and examples of the incidental protection of valuable habitats.

- Most agreements were assessed as offering a 'high' level of additionality and value for money. The work would not have been done without the Scheme and what work would have been done would have been a lower standard. In the best examples, environmental damage was prevented and sites offered reasonable public benefit in terms of access and visibility.

1.7 The major recommendations to improve the implementation of the Scheme in arable margin areas are:

- the archaeology and historic features within the arable crops of fields with arable margins should be considered both by the Project Officer and the County Archaeologist;
- agreements should be signed early so that arable margins can be established in the first year of the agreement;
- arable margins should involve management or use seed mixtures that encourage floral as well fauna diversity;
- the width of arable margins should be related to machinery extant on the holding;
- the width of margins should be measured into the croppable land using the IACS rules;
- the seeds mixture should be altered to make a suitable sward for people and/or horses if access provision is made;
- wider margins (6 m or wider) should be encouraged to buffer watercourses and other features adequately;
- more corners of fields could be allowed to scrub-up as this would benefit birds, mammals and butterflies greatly. Sites should always be chosen with consideration of the effects of the scrub on the landscape and archaeology;
- margins should be cut to promote the seeding of plants if the area is known for its arable flora;
- Management prescriptions should include the clause to protect archaeological sites from the attention of people with metal detectors (para. 5.35); and
- agreements should promote the management of arable margins to protect historic features.

1.8 The major recommendations to improve the Scheme in general are:

- It must be emphasised that Project Officers should check all aspects of a holding no matter how good the material appears in a submitted management plan;

- it must be made clear to statutory bodies that, when consulted, they consider the whole holding and not just the land highlighted in the agreement application, and the protocol concerning the consultation between Project Officers and County Archaeologists should be adhered to;
- where the advice of a consultee is not subsequently followed, for whatever reason, the agreement file should clearly indicate the reasoning behind this decision and the consultee should be informed;
- there should be better wording of access objectives, matched by appropriate management prescriptions, wherever access provision has been included in the agreement;
- more care should be taken when creating the agreements using the standard menus available to the Project Officers so that contradictory prescriptions are not left in the agreement;
- Some scheme objectives are unclear and poorly worded, and should be amended to better define and reflect each element included in the management prescriptions and capital items;
- where there are multiple agreements involving Countryside Stewardship and/or other schemes on a single holding, a document should be produced identifying each and their agreement dates; and
- Cross-compliance (currently largely limited to boundary trees) should be extended to include all mature and veteran trees in the agreement area. Ideally, all cross-compliance features, in particular archaeological and historical features, and all mature and veteran boundary, field and parkland trees should be included on agreement maps, but it is acknowledged that this would give rise to significant additional cost.

FIELD BOUNDARY (Code B)

1.1 This report provides an evaluation of field boundary agreements within the Countryside Stewardship Scheme (CSS). This evaluation is part of a larger environmental evaluation of the whole scheme being carried out for the Ministry of Agriculture Fisheries and Food (MAFF) by ADAS, CEH and CCRU.

1.2 A sample of 33 field boundary agreements signed in 1998 were chosen for evaluation in 1999. The evaluation covered a number of stages:

- a desk study of agreements;
- agreement holder interviews;
- an ecological, landscape, archaeological and access field survey of holdings;
- an appraisal.

1.3 The appraisal is the core of the project and involved a review and assessment of each sample agreement by a multi-disciplinary team of specialists. Each agreement was evaluated and scored in relation to five criteria:

- agreement negotiation;
- appropriateness;
- environmental effectiveness;
- compliance;
- side effects.

The evaluation also included an assessment of the additionality and value for money provided by the agreement.

1.4 The report summarises the results identified from each stage of the project, highlighting the range and distribution of scores for each criterion assessed.

1.5 In drawing out conclusions and recommendations, the report addresses both those issues specific to field boundary agreements, as well as those relevant to the whole Scheme, but derived from an evaluation of field boundary agreements. It recommends improvements to the operation of the existing Scheme, as well as, where appropriate, strategic improvements to the Scheme as a whole.

1.6 The major results and conclusions of the report with regard to field boundary agreements are:

- Field boundary sample agreements range widely in holding size (5.2 ha to

515 ha), area of land under agreement (0 ha to 29 ha) and length of boundaries being restored (0 to 8452 m). The sample tends to under represent southern England in comparison to all field boundary agreements which are distributed throughout England.

- The majority (81%) of agreement holders were classified as 'agricultural', with more being owner occupiers than tenants. A third of holdings were primarily beef producing farms, a further third were either mixed livestock or dairy farms, and a sixth were primarily arable enterprises.
- Most, but not all, agreements (94%) involved field boundary restoration work. Capital works other than boundary management per se was undertaken on three quarters of agreements, and managing grassland on two fifths of agreements.
- Most field boundary agreements were well set up, with good Project Officer involvement. The level of consultation was notably higher than for agreements monitored during the previous two previous years of this project, but consultation with the County Archaeologist, which is a Scheme requirement, still did not always occur.
- The report expresses concern at the number of missed opportunities. In particular, agreements did not always fully acknowledge the historical and archaeological importance of the sites involved.
- All agreements had at least landscape and wildlife objectives and these were generally appropriate and feasible. On a number of occasions there were prescriptions which did not relate to any objective. On other occasions the appraisal team felt that the objectives were too vague.
- There was not enough detail in the management prescriptions for capital works, such as tree planting and pond creation.
- Agreements were judged effective to maintain and enhance the wildlife and landscape of virtually all sites, but less effective in maintaining the historic and archaeological interest. This reflected a lack of acknowledgement of historic features on the holding rather that poor objectives or prescriptions.
- The level of compliance was judged to be high in the majority of agreements. Nearly all agreement holders were motivated and wished to comply with their agreement, although a few were not fully aware of all the requirements of the Scheme.
- Most field boundary agreements had modest positive side effects. These included better environmental practice on the rest of the holding, extending neighbouring valuable wildlife sites, and encouraging others to join the Scheme.
- Four fifths of agreements were assessed as offering a high or medium level of additionality and value for money. Some work that the agreements supported would have been done anyway, but not to the same scale or standard. Environmental damage was prevented and sites offered reasonable public benefit in terms of access and visibility.

1.7 The major recommendations to improve the implementation of the Scheme in field boundary areas include:

- Special attention should be paid in field boundary agreements to the protection of field and hedgerow trees, with specific management prescriptions through cross-compliance (The appraisal team acknowledges that this may entail an administrative cost).
- Hedge species should be listed in a more detailed and site specific manner.
- Care must be taken to ensure boundary restoration work is appropriate, both to the regional style and to the character of that particular boundary.

1.8 The major recommendations to improve the Scheme in general include:

- Agreements should be internally consistent so that objectives always have prescriptions allowing them to be achieved, and all prescriptions correspond to at least one objective.
- Objectives should always be specific, not vague, in order to better inform the agreement holder of what is required.
- There is a need for more effective historic landscape/archaeological input to agreements, especially at the agreement negotiation phase in order to more fully acknowledge the historic and archaeological interest. This is likely to be achieved by a combination of training for Project Officers, and better consultation with outside experts.
- Consideration should be given to provide more detailed prescriptions for capital items, and tree planting and pond creation in particular. This would better inform the agreement holder what is required, and enable better compliance monitoring. The administrative cost of this may be significant.
- Cross-compliance prescriptions need to be reviewed and presented within one dedicated schedule in the agreement.
- Consideration should be given to the inclusion on agreement maps of cross-compliance features, in particular archaeological and historical features, and all mature and veteran boundary, field and parkland trees. The appraisal team acknowledges that the extra work involved in this may entail significant cost.
- Supporting written guidance should be cross referenced within the agreement to make it legally part of the agreement.
- Existing management plans should be cross referenced within the agreement, and where management plans are still to be produced, their specifications should form part of the agreement.
- There should be a comprehensive review of the structure of the agreement document to bring the relevant points presented above and in the other topic reports together.

OLD MEADOW AND PASTURE (Code M)

1.1 This report provides an evaluation of old meadow and pasture agreements within the Countryside Stewardship Scheme (CSS). This evaluation is part of a larger environmental evaluation of the whole Scheme being carried out for the Ministry of Agriculture Fisheries and Food (MAFF) by ADAS, CEH and CCRU.

1.2 A sample of 48 old meadow and pasture agreements signed in 1998 were chosen for evaluation in 1999. The evaluation covered a number of stages:

- a desk study of agreements;
- agreement holder interviews;
- an ecological, landscape, archaeological and access field survey of holdings;
- an appraisal.

1.3 The appraisal is the core of the project and involved a review and assessment of each sample agreement by a multi-disciplinary team of specialists. Each agreement was evaluated and scored in relation to five criteria:

- agreement negotiation;
- appropriateness;
- environmental effectiveness;
- compliance;
- side effects.

The evaluation also included an assessment of the additionality and value for money provided by the agreement.

1.4 The report summarises the results identified from each stage of the project, highlighting the range and distribution of scores for each criterion assessed.

1.5 In drawing out conclusions and recommendations, the report addresses both those issues specific to old meadow and pasture, as well as those relevant to the whole Scheme, but derived from an evaluation of old meadow and pasture sites. It recommends improvements to the operation of the existing Scheme, as well as, where appropriate, strategic improvements to the Scheme as a whole.

1.6 The major results and conclusions of the report with regard to old meadow and pasture agreements are:

- The sample of old meadow and pasture agreements reflects the overall distribution of these agreements which are concentrated in the West and

South West of the country, with relatively few agreements located within the eastern regions.

- Just over half the sample agreements (56%) are located within designated areas, notably Areas of Outstanding Natural Beauty (AONB) and areas with a national or local wildlife designation.
- The average holding size on which agreements are located is 89 ha. Agreement areas are typically small (with an average area of 10.4 ha) reflecting the fragmented nature of the resource.
- Seventy three percent of old meadow and pasture agreement holders are agricultural, with arable farms as the dominant farm type. All agreements included the management of existing pastures and meadows, with a minority (10%) for grassland recreation on cultivated land as arable margins or whole fields. The majority of agreements (96%) also included management and restoration of boundary features such as hedges.
- In most old meadow and pasture agreements, the agreement negotiation process was judged to be positive. Overall, project officers played a valuable role in improving the quality of applications and providing advice to applicants. However, consultation with statutory agencies did not always take place and was a cause for concern. Missed opportunities were apparent for all types of environmental feature, including fields of greater ecological value than those under agreement. Only in four agreements with historic missed opportunities were these thought to present a threat of damage from agricultural practices.
- The majority of old meadow and pasture agreements had appropriate and feasible objectives and management prescriptions. Examples of good practice included management prescriptions which paid particular attention to appropriate grass and wildflower seed mixes, weed and scrub control measures, hedge species and hedge management guidelines. For some agreements, the report expresses concern at the complete omission of, and/or the lack of site-specific and detailed ecological and historical objectives and management prescriptions which have implications for effectiveness. It was not thought to be necessary to include within access objectives the legal obligations of landowners in relation to rights of way on their holdings.
- All old meadow and pasture agreements were judged effective to maintain the ecological interest, with the majority effective to maintain the landscape (15%), history (67%) and access interests too. Enhancement was judged as likely in the majority of agreements with a landscape and ecological interest (83% and 58% respectively), and in a minority of cases (12%) where historical features were of importance. Concern was expressed that although protected by agreements, low diversity pasture should not be considered a priority under the scheme unless more interventionist management prescriptions are included, to enhance the ecological value of these sites. Management plans improved the effectiveness of agreements.
- Compliance was judged highly likely in the majority of old meadow and pasture agreements, although concerns were expressed where

implementation of the agreement was dependent upon third parties, particularly tenant farmers, and where inconsistencies occurred in the identification of cross-compliance features.

- The majority of old meadow and pasture agreements had positive side effects. These most often included beneficial effects upon adjacent habitats or landscape features, improved connectivity with existing habitats and complementing existing CSS agreements on the holding.
- *High / medium* additionality and value for money were found on the majority of old meadow and pasture sites. Here, all, or the majority, of the work undertaken would not otherwise have been done. On a quarter of sites, much of the work would have been undertaken anyway, although possibly to a lower standard and in a less systematic way.

1.7 The recommendations to improve the implementation of the scheme in old meadow and pasture areas are listed below.

- In order to meet the objectives of old meadow and pasture landscapes, greater effort should be made to include those meadows and pastures of the highest ecological value within agreements to ensure their most appropriate management. Such areas are not always formally recognised i.e. as locally or nationally designated sites. To help identify these areas, use could be made of English Nature grassland inventories which are currently being digitised by FRCA.
- Specific attention should always be paid to the provision of detailed management prescriptions for weed control. Where problems with specific weeds occur, e.g. Japanese Knotweed and Himalayan Balsam, standard management prescriptions should be adapted accordingly.
- Where hay spreading is recommended as a management prescription for increasing the diversity of semi-improved pasture, the source of the hay should be specified.
- Where hedge and tree species are to be planted they should be appropriate to the site and always listed in the management prescriptions.
- Specific information should be provided in the agreement on the location, rationale for, and after-care management for all tree planting tasks, to ensure their effectiveness with regard to landscape and wildlife enhancement.
- The inclusion of low diversity and improved grassland should not be considered a priority in a scheme with restricted funds unless: they are linking or buffering other ecologically rich sites; or more interventionist management prescriptions are considered such as ploughing, reseeding, or use of plugs and pot grown plants to ensure an improvement in wildlife value and thus landscape quality.
- To ensure that agreements are fully effective where scrub control is a stated objective, management plans should be produced with the aid of specialist advice in specific cases such as the eradication of noxious weeds. A list of

contacts with specialist knowledge should be compiled and distributed to RSCs.

- Consideration should be given to including a separate objective for the creation of access on old meadow and pastures.
- Consideration should be given to revising the objectives of old meadow and pasture landscapes to include landscape features such as walls and the creation of grass margins.

1.8 The recommendations to improve the scheme in general are:

- Project Officers should pay greater attention to ensuring that agreement holders are fully able to implement all the work under the proposed agreement, that they understand scheme requirements, including cross-compliance, and the rationale for these.
- Where consultation is a statutory or formal requirement within the Scheme a stronger mechanism needs to be found to ensure that this always takes place, and that there is evidence of this on file.
- Where the advice of a consultee is not subsequently followed, for whatever reason, the agreement file should clearly indicate the reasoning behind this decision and the consultee should be informed.
- To avoid as many missed historical and archaeological opportunities as possible, it is recommended that: the CA be asked to check for historic features on the holding as a whole, not just the agreement area; and additional training is provided for Project Officers.
- To avoid as many missed opportunities as possible, Project Officers and scheme partners (such as FWAG) should ensure that discussion takes place of all possible options under the Scheme with potential agreement holders during the agreement negotiation process.
- Consideration should be given to the adoption as standard practice of referencing an existing CSS agreement within a new agreement's objectives and map, to ensure that a fair evaluation of missed opportunities and side effects can take place.
- Where an environmental or access feature is within an agreement, objectives and management prescriptions for these features should be consistently included within scheme documentation.
- Consideration should be given to making objectives and management prescriptions more site specific and sufficiently detailed. Use of standard clauses within objectives and management prescriptions are not always adequate in providing site-specific detail and should be appropriately amended. Although there are administrative implications, this would enable compliance to be fairly assessed and to ensure the effective protection or enhancement of the environmental feature to which they refer.
- Access objectives should avoid the sole use of the legal obligation of landowners to keep existing rights of way clear. Where there is no new

access provision, access objectives should incorporate legal obligations alongside statements emphasising the access objective of the scheme and other site specific actions which benefit access. Where new access provision is proposed, management prescriptions should always be included in the agreement.

- Management plans should be produced according to the requirements of the Scheme. Management plans should be accurately referenced within the agreement, and attached to the agreement as part of the legal document.
- Encouragement should be given to more joint landowner/tenant agreement holders, to give tenants more ownership of, and hence commitment to, the agreement that they have to comply with.
- Where a nationally important site, species or feature are known to be present on the site or have been identified, these should be included in the objectives and the management prescriptions should be in line with any related action programmes (e.g. BAPs).
- Agreement objectives should always mention any environmental designations affecting and/or covering agreement land (e.g. SSSI, SAM or AONB) and the location of site specific designations (e.g. SSSI, SAM) should be recorded on the agreement map. Internal checking procedures within FRCA should ensure that this takes place.
- Consideration should be given to preventing agreement holders increasing stocking levels on grassland outside the agreement land, to avoid environmental damage elsewhere. Article 12 of the Rural Development Regulation will prevent the increase of stocking levels elsewhere on the farm and this will apply to Scheme agreements from this year onwards.
- All documents relevant to the agreement, particularly management plans, should be clearly cross-referenced and appear on file.
- Cross-compliance (currently largely limited to boundary trees) should be extended to include all mature and veteran trees in the agreement area.
- Consideration should be given to the inclusion of all cross-compliance features on agreement maps. Although there are cost and administrative implications, this would facilitate evaluation and ensure that agreement holders are reminded of their cross-compliance commitments.

ORCHARDS (Code O)

1.1 This report provides an evaluation of agreements to restore old orchards within the Countryside Stewardship Scheme (CSS). This evaluation is part of a larger environmental evaluation of the whole Scheme being carried out for the Ministry of Agriculture Fisheries and Food (MAFF) by ADAS, CEH and CCRU.

1.2 A sample of 33 orchard agreements signed in 1998 was chosen for evaluation in 1999. The evaluation covered a number of stages:

- a desk study of agreements;
- agreement holder interviews;
- an ecological, landscape, archaeological and access field survey of holdings;
- an appraisal.

1.3 The appraisal is the core of the project and involved a review and assessment of each sample agreement by a multi-disciplinary team of specialists. Each agreement was evaluated and scored in relation to five criteria:

- agreement negotiation;
- appropriateness;
- environmental effectiveness;
- compliance;
- side effects.

The evaluation also included an assessment of the additionality and value for money provided by the agreement.

1.4 The report summarises the results identified from each stage of the project, highlighting the range and distribution of scores for each criterion assessed.

1.5 In drawing out conclusions and recommendations, the report addresses both those issues specific to old orchards, as well as those relevant to the whole Scheme, but derived from an evaluation of orchard sites. It recommends improvements to the operation of the existing Scheme, as well as, where appropriate, strategic improvements to the Scheme as a whole.

1.6 The major results and conclusions of the report with regard to orchard agreements are:

- The orchard holdings monitored were of considerable landscape

significance and held a range of archaeological and historical interest, much of which was outwith the standard designations. Ecological interest was more limited, generally focused on the old fruit trees and grasslands.

- As well as orchard restoration, the majority of agreements involved boundary restoration and many included grassland management. Some included arable margins, and some access provision. Most proposed tree management and planting.

- Most historic landscape agreements were well set up, with good consultation and few missed opportunities. Most statutory or formal consultations took place, although in some cases consultation with the County Archaeologist failed to identify all historical interest, especially on the wider holding. Missed landscape opportunities were the most common, whilst historical missed opportunities were the most damaging.
- Most agreements had one or more objectives and these were generally appropriate and feasible, but did not generally refer to environmental designations. Only two-thirds of agreements had access objectives and half of these only referred to the legal obligation of maintaining rights of way. Historic objectives were sometimes too general. Management prescriptions were often very limited for capital works, such as tree planting or management, and access provision.
- The Scheme objectives for restoring old orchards were largely met, with the exception of access, where there was moderate success. The lack of objectives for historical interest and orchard boundary restoration was noted.
- Agreements were judged generally effective to maintain the ecological, landscape and archaeological interest, but enhancement was largely limited to the landscape and wildlife interest. This may have been partly due to the categorisation of the 'orchard' element under 'landscape' rather than 'historical' interest, and to the tendency for historical interest to lend itself to maintenance rather than enhancement. There were a few conflicts identified relating to tree planting and ploughing of sites of archaeological interest. Management plans were provided for less than two-thirds of agreements and were of variable quality: some were very good and others inadequate. Detailed reference to the plan in the agreement and acknowledgement on file of the plan's status was often poor.
- Compliance was judged highly likely in most cases, for both agricultural and non-agricultural agreement holders. There was some evidence that a higher level of contact and advice from the Project Officer during the agreement would be beneficial to agreement holders.
- There were few side effects identified in orchard agreements. The most common positive effect was that the agreement complemented existing CSS agreements, environmental designations or valuable sites. Benefits were gained from the heightened awareness of some land owners of environmental issues.

- Most agreements were assessed as offering a 'medium' or 'high' level of additionality and value for money. Much of the orchard work would not have been carried out without the Scheme. Some work on the rest of the holding that the agreements supported would have been done anyway, but not to the same scale or standard. Environmental damage or neglect was prevented and sites offered reasonable public benefit in terms of access and visibility.

1.7 The major recommendations to improve the implementation of the Scheme for orchards include:

- The need for a more proactive approach to the recording and protection of historic landscape features of orchard agreement, both in terms of historic survey, consultation with outside organisations, and better training for Project Officers.
- The requirement for all orchard agreements to have a management plan should be met. The quality of these plans needs to be carefully checked, taking expert advice as necessary. Agreements should make reference to any other initiatives, and contextual information should be provided. A standard 'framework' document could be prepared as a model and checklist.
- Management plans for the whole holding, incorporating the orchard management plan, should be prepared where the proposals are complex and interrelated.
- Standard guidance notes for the planting and maintenance of orchards should be provided to ensure good practice and these might include recognised good advice currently in circulation.
- The need for agreements to include details of and specifications for capital items, tree management and tree planting (all typical management items in historic landscape areas). Detail of tree planting is particularly important to minimise the risk of damage to known sites of archaeological interest and to ensure the suitability of proposals. Individual trees and small copses, especially old and veteran, should be protected with specific management prescriptions. The conservation of mistletoe should be mentioned.
- Continuing advice and contact between the Project Officer and the agreement holder should be encouraged after the agreement is signed.
- Agreement objectives should identify all important environmental interests or designations and also refer to other agreements or schemes on the holding to explain the context of the proposals.
- At the strategic level, the report suggests the need to revise Scheme objectives for orchards, to include reference to historical interest and to orchard boundaries. For orchard agreements cross-compliance should be extended to cover individual trees, tree lines and small copses.

1.8 The major recommendations to improve the Scheme in general include:

- The principle of 'lead' topics such as 'old orchards' for categorising CSS agreements should be reviewed.
- The need to consider a slightly wider role for the Project Officer, to provide more contact post-agreement and to provide contract management advice. Project Officers should promote an holistic approach to applications linked to other complementary schemes.
- Project Officers should ensure that all decisions regarding agreement negotiation are fully documented and easily retrieved.
- The need to ensure that all statutory and formal consultations are carried out, and to ensure that, where consultee advice is not followed, that a justifiable reason is added to the agreement file. Consultees should be given the full details of the holding, not just the agreement proposals. County Archaeologists should be asked for information on historical features other than SAMs.
- The wording of access objectives should be amended to suit proposals that can be provided under the Scheme. Reference to existing obligations regarding rights-of -way should be made separately.
- Agreement objectives should always refer to any important environmental interest and mention all designations.
- The need to avoid over-reliance on standard clauses and guidance notes in agreements, unless these are suitably adapted to the specific needs of the particular site concerned. Management prescriptions need to be very clearly worded and unambiguous, especially for non-technical agreement holders.
- The need to ensure that management plans are attached to CSS agreements and that they are adequately linked and properly referenced to the agreement.
- At the strategic level, the report suggests the need to consider clearly cross-referencing and dating all documents relevant to the agreement. In addition, any previous or existing agreements should be highlighted in the new agreement objectives and on the map.

MANAGEMENT PLANS

1.1 This report provides an evaluation of management plans used within agreements under the Countryside Stewardship Scheme (CSS). This evaluation is part of a larger environmental evaluation of the whole scheme being carried out for the Ministry of Agriculture Fisheries and Food (MAFF) by ADAS, CEH and CCRU.

1.2 The evaluation combined data from two sources:

- a brief examination of all 202 agreements that should have included a management plan, drawn from the full sample of all 484 agreements covered in the full monitoring and evaluation of CSS, together with
- a detailed examination of a random sub-sample of 72 of those 202 agreements, 54 of which actually contained a management plan.

The latter included 46 examples of agreements where a plan was a mandatory requirement under the scheme, as well eight discretionary plans. The detailed evaluation involved a desk study examination of the management plan document itself, a review of the management planning process, and a comparison of the appraisal scores for the sample as compared to an equivalent sample of agreements without management plans.

1.3 The evaluation of management plans concentrated on the following major issues:

- the role of management plans in CSS;
- the administrative process;
- the quality of the plans;
- the effectiveness of management plans in achieving environmental benefits.

1.4 The report highlights key results and draws conclusions and recommendations for each of these major issues.

1.5 The main conclusions are:

- Management plans fulfil an important role in CSS by:

  a) providing a simple and clear management tool for the agreement holder, and

  b) ensuring that all elements of the land resource (including ecology, landscape, historical features and access and amenity) are taken account of, and evaluated in order to maximise the effectiveness of the scheme.

- The advice available to applicants on preparing a management plan was poor and inconsistent.

- Overall the quality of management plans was extremely varied and most were lacking in many of the essential constituent parts of a good management plan. Of those agreements sampled in detail (72) a quarter did not contain a management

plan on file. Of those that did have a management plan, just over a third were assessed as poor or very poor. Even those management plans assessed as good or excellent did not always entirely meet the purposes for which a management plan was required under the scheme, perhaps lacking a full evaluation of the value and sensitivities of the site.

- Management plans did contribute to improving both the environmental effectiveness of agreements, and the ability of agreement holders to fully meet the requirements of the agreement

- The success and effectiveness of the scheme could be increased by improving the quality of management plans.

1.6 The major recommendations to improve the role of management plans in the Countryside Stewardship Scheme include:

The role of management plans:

- The need to clearly set out procedures for the production of management plans in scheme literature.

- The need to consider making management plans mandatory where land in environmental designations (such as SSSI) in involved.

- The need to consider the appropriateness of management plans for scrub control and capital special projects in isolation, and to encourage the use of discretionary management plans where there are raised water level proposals, complex tasks, or multiple agreements on a holding.

The administrative process:

- The need to fully reference management plans in agreements, so that they become a legal part of the agreement, and to reference to most up to date version of the plan.

- The need to ensure that the agreement holder is fully aware of the requirement to provide a management plan, where a statutory requirement of the scheme, and to set up a procedure for tracking the production of such plans, to aid with compliance

monitoring.

The quality of management plans:

- The need to improve the quality of management plans by encouraging applicants to include objectives, contextual information, an evaluation and a work programme.

- The need to provide applicants with clear guidance on the production of a plan, a standard 'framework' document for the production of a plan, and perhaps standard guidance notes on the more common tasks to be undertaken.

- The need to consider encouraging the provision of additional professional advice, especially on post-agreement plans, and on the more complex management plans, supported perhaps by a higher CSS payment if required.

Environmental effectiveness:

- The need to improve the effectiveness of management plans by ensuring that they are concise and understandable, consider all interests, ideally look wider than simply the land or habitat under consideration, and can be implemented.

SPECIAL PROJECTS

1.1 This report provides an evaluation of special projects used within agreements under the Countryside Stewardship Scheme (CSS). This evaluation is part of a larger environmental evaluation of the whole scheme being carried out for the Ministry of Agriculture Fisheries and Food (MAFF) by ADAS, the CEH and CCRU.

1.2 The evaluation examined both special projects shown on the MAFF special project database, and those occurring in the 484 agreements chosen as the main sample for the larger environmental evaluation of CSS. The latter included 120 special projects, occurring in 98 agreements. For these 120, the evaluation was based on detailed information from the agreement, field survey, desk study and agreement holder interview.

1.3 The evaluation of special projects concentrated on the following major issues:

- the role of special projects in CSS,
- the administrative process,
- the quality and ease of implementation of the work,
- the effectiveness of special projects in achieving environmental benefits,

together with an assessment of the additionality of the work carried out.

1.4 The report highlights key results and draws conclusions and recommendations for each of these major issues.

1.5 Major results and conclusions with regard to special projects are:

- Special projects fulfil an important role in CSS in enabling the completion of work that is outside the normal scope of the scheme.
- They cover a very wide range of both revenue and capital environmental work, much of which is of a 'one-off' nature.
- Whilst covering all four main environmental interests, special projects are concentrated in the South West, and in parkland, coastal and orchard lead landscape types.
- The administrative process for approving special projects is more complicated than for standard agreements, generally requiring additional details, and approval by CMD. There was no evidence that this led to undue delays in the majority of cases, although in a few cases the implementation of the special project was deferred, and occasionally withdrawn or dropped.
- The documentation of special projects, both on files and in agreements was

found to be very variable, and management plans, although currently a scheme requirement for all special projects, were not always included. In those cases where straightforward management tasks were involved this may not have affected the success of the special project; in those cases where complex management tasks were involved it probably would.

- All special projects were found to contribute to the achievement of environmental benefit, either directly, or, as for example in the case of cattle grids, indirectly, by enabling environmental benefit elsewhere (in this case through grazing management).
- A small number of special projects were found to have detrimental environmental side effects, a probable consequence of their focus on a single issue (e.g. a winter stubble agreement intending to plough up high diversity permanent grassland - O35)

1.6 The major recommendations to improve the role of special projects in the Countryside Stewardship Scheme include:

The role of special projects

- The need to consider making winter stubble retention a standard management item (pending the results of the Arable Stewardship pilot scheme), and the casting up of earthbanks, the provision of restoration plans and the provision of interpretation boards standard capital items within CSS.
- Where special projects require a different specification to normal, there is a need to fully document the reasons for this.

The administrative process

- The need to document fully changes in standard requirements that lead to the requirement for a special project.
- The need to improve and fully maintain the MAFF special project database, and to find better ways of showing special projects on agreement maps.
- The need to ensure that all special projects are matched by objectives in the agreement, to help ensure their completion.
- The need to consider broadening the use of special projects to help target CSS at issues where there would be greatest environmental benefit, for example where there is encouragement for the reinstatement of former landscape features, for the reinstatement of historic landscapes, for the encouragement of Biodiversity Action Plan (BAP) species, and for the provision of additional access or amenity features.
- The need to encourage special projects specifically aimed at stone curlew (which in the three years examined were under-represented, and whilst taking full account of landscape interests) and aimed at improving access and amenity facilities in the urban fringe.

Quality/ ease of implementation

- The need to provide full management plans for all special projects with complex management tasks, but not for those that involve straightforward management tasks.
- The need to consider the provision of guidance leaflets for technically critical, but low value capital special projects, which could replace the need for a management plan.

Effectiveness

- The need to take account of all environmental interests (including ecology, landscape, historic interest and access) in agreeing special projects, in order to avoid detrimental side effects.

SCORING SYSTEM

1.1 This report provides an evaluation of the scoring system used within the Countryside Stewardship Scheme (CSS). The evaluation is part of a larger environmental evaluation of the whole scheme being carried out for the Ministry of Agriculture Fisheries and Food (MAFF) by ADAS, CEH and CCRU.

1.2 The evaluation of the scoring system was based on a sample of twenty-one 1998 agreements with the aim of determining the strengths and weaknesses of the scoring system used in that year. Comparisons were also made with the scoring system used in 1999. The rationale for selecting the sample was:

- the appraisal or desk study identified a potential 'issue' concerning that case e.g. more than one score was recorded in the file;
- there was a variation between the Initial and Full Assessments e.g. one appeared low and the other relatively high in comparison;
- agreements with comparable Initial and Full Assessment scores to provide a control sample.

1.3 Telephone interviews with Project Officers (POs) who had been involved with each of the selected cases provided the information for the evaluation. The 21 POs were questioned about their understanding of the site and their reasoning for the allocation scores in both stages of the system. The interview also included general questions covering the PO's perceptions of the scoring system and how it operated. All of the issues raised were then compared against the 1999 scoring system to see if this system had eradicated or retained these points. The methodology was not designed so as to be statistically representative but to enable a qualitative analysis and deep analysis of the scoring system.

1.4 Given the importance of the scoring system in determining how the scheme budget is allocated, the evaluation assessed the extent to which the system was delivering the following:

- agreements which meet the objectives of the scheme;
- agreements which meet national and local targets;
- sites which offer the greatest potential benefit for enhancement;
- targeting of resources to those agreements which offer the best value for money;
- consistency across the regions.

1.5 The scoring system has two distinct stages. First, applications are scored within five days of being received under the Initial Assessment, in order to determine

if and when they receive a site visit. Following a site visit, usually undertaken by the same PO who completed the Initial assessment, a draft agreement is prepared. This draft agreement is then scored in the second stage of the system, the Full Assessment.

1.6 In drawing out conclusions and recommendations, the report addresses issues specific to the two stages of the scoring system, as well as those relevant to the process as a whole. It recommends improvements to the operation of the 1998 and 1999 scoring systems, as well as, where appropriate, strategic improvements to the rationale of the process.

1.7 The main conclusions are:

- The relationship between the application form and Initial Assessment needs strengthening in two areas, the information requested and the format of the application;
- Most POs agree that the Initial Assessment is an objective process but local knowledge and professional judgement have a part to play in the selection of sites;
- Uncertainties in the allocation of Initial Assessment scores were caused by the need to meet all four Scheme objectives, meeting target area objectives and poor presentation of the application;
- The 1999 Initial Assessment was an improvement on 1998 with more categories and better use of written descriptors rather than accompanying notes;
- The relationship between the Initial Assessment and Full Assessment was generally strong, but for non-target area applications the criteria changed;
- The site visit is a crucial part of the Scheme as well as the scoring system but this increases the need for professional judgement in the assessment of applications;
- Where applications are next to an existing environmental agreement (CSS or otherwise), the Full Assessment should consider the added value aspect and include the existing agreement in any calculation of environmental benefits;
- If a fixed rather than flexible threshold is to be adopted the level at which the threshold is set requires careful consideration;
- Within the Full Assessment, the full range of scores is preferred by POs as is equal weighting for each of the Scheme objectives;
- National commitments, such as BAPs, have an important role to play within CSS but they should not be used to distort the balance between the Scheme objectives by making wildlife numerically more important than the other three objectives;
- The written descriptors used in the 1999 Full Assessment were preferred by POs;
- Scheme partner support is considered by POs to be important in securing an

agreement;

- The Scoring System is an assessment of environmental benefits and not value for money; the criteria in the scoring system should therefore judge environmental benefits rather than other factors such as the quality of an application as this measures the administrative assistance provided by the proposal;
- The 1998 scoring system is perceived by POs as delivering agreements which meet the Scheme's objectives and national and local targets;
- The scoring system needs to distinguish between inherent value and potential enhancement so that sites of high and low environmental quality can be assessed;
- A measure of value for money would be useful in marginal cases and to explain why high scoring applications were not offered agreements;
- In order for single-issue applications to be retained within the Scheme, PO recommendations should remain part of the process.

1.8 The major recommendations to improve the scoring system and its role within the Countryside Stewardship Scheme include:

- The information required in the application should be adequate for and appropriate to the Initial Assessment. Changes suggested include an adaptation of Part 7, use of relevant examples and an improvement in the presentation of the application and application pack so that all applicants can clearly understand the requirements;
- The use of descriptors within the Assessment proformas, especially in 1999, increases objectivity and should be used in preference to accompanying notes;
- Where an application cannot be effectively assessed because of poor presentation it should be referred and the applicant encouraged to seek the advice of a partner organisation and re-apply;
- The Initial Assessment should retain individual scores for Scheme objectives as in 1999 but should seek to reduce the overall number of categories;
- The Initial Assessment should retain an element of local knowledge in order to assess the environmental effectiveness of an application;
- The criteria should be consistent between the Initial and Full Assessments;
- The Full Assessment should retain an element of professional judgement, particularly in regard to the attitude of the applicant to the Scheme;
- The practice of scoring applications with existing CSS agreements to include the added value of the two should be extended to all complimentary schemes;
- Wherever possible the full range of scores should be used in any category;
- Scores should be equal between the four Scheme objectives, therefore

consideration should be given to the separation of access criteria into inherent value and potential enhancement;

- The Scheme literature should make it clear that support from a Scheme partner is an important factor when POs are considering applications;
- All the criteria should be checked to ensure that they are appraising environmental benefits. Those which are not, such as the point for a 'comprehensive applications', should be excluded;
- The distinction between inherent value and potential enhancement should be retained and factors, such as BAPs, should be assessed in one but not both aspects;
- Consideration should be given to the development of a measure of value for money. This would be useful in marginal case;
- So that single-issue sites are not excluded from the Scheme, the PO recommendation should be retained;
- The scoring system should be subject to a major review every three years but the ability to make minor changes to bring it in line with relevant policy developments should be retained.

MODULE 2

1.1 This report presents the results of an assessment of the ecological quality of land within the Countryside Stewardship Scheme, an agri-environment scheme designed to enhance the environmental quality of farmland in England, first introduced in 1991. This assessment forms Module 2 of the evaluation of the Scheme conducted by ADAS, CEH and CCRU.

1.2 The objectives of the assessment were to assess the ecological quality of a sample of agreement land in terms of vegetation characteristics and the habitats as listed within the UK Biodiversity Action Plan. The detailed objectives were to:

- obtain national estimates of the extent of Biodiversity Action Plan (BAP) Broad and Priority Habitats under Countryside Stewardship Agreements;
- obtain national estimates of vegetation character, and hence ecological quality of all agreement land;
- obtain national estimates of vegetation character, and hence the ecological quality, of BAP Priority Habitats on Agreement land;
- analyse the distribution of areas and vegetation characteristics of agreement land (with special reference to Priority Habitats) with regard to geographic location, agreement age and type, and other factors as appropriate; and
- establish a baseline for the future evaluation of changes in ecological quality.

1.3 The assessment of ecological quality is essentially comparative in nature. If the targeting of land of high ecological quality is an objective of the Scheme, then there should be measurable differences between agreement land and land in the countryside as a whole. If already targeted areas, such as Environmentally Sensitive Areas, were to be excluded from the countryside as a whole the measurable differences would be expected to be greater. The trends in ecological quality through time can only show whether the Scheme has added ecological value if they are considered relative to trends in the English countryside as a whole.

1.4 This assessment provides a timely baseline for the Scheme as a whole as it coincides with Countryside Survey 2000, a national survey of land cover and vegetation, and also uses methods that are largely comparable.

1.5 The method was based upon an unstratified random survey of all agreements in force at the end of 1997, excepting boundary-only agreements. A total of 451 agreements (8.7%) were surveyed, and accounted for 8894 ha (7.2 %) of the total area. At each site, only land within the agreement was surveyed. Surveys took place during 1998 and 1999.

1.6 The land was mapped using UK Biodiversity Action Plan Broad and Priority Habitats. Broad Habitats were mapped using a vegetation key and Priority Habitats were mapped on the basis of expert knowledge and, the definitions current at the time of the start of the survey (largely the same as those that are current at the time of writing). The "Improved grassland" Broad Habitat was subdivided for this survey into "Highly improved grassland", "Semi-improved/improved grassland" and "Sown light grass mixtures". All land with a field margin management code was recorded as a Cereal Margin Priority Habitat; as all fell within the defined Cereal Field Margin Priority Habitat even when cereals were not present. Mosaics were also identified. This information was digitised for analysis using Arc-View.

1.7 A random 200 m^2 vegetation quadrat was recorded within each agreement using Countryside Survey methods. In addition, a quadrat was recorded in every Priority Habitat present at the site, excluding any that had been recorded by the random quadrat. The quadrat positions were mapped and marked in the field to allow precise relocation. Each quadrat was classified in terms of National Vegetation Classification (NVC) and Countryside Vegetation System (CVS); species number and presence of rare and scarce species were also quantified. The quadrats were co-located with the spatial data in the database.

1.8 In addition, a variety of observations were taken (e.g. photographs and target notes on rare species and/or weed infestations) to aid interpretation of future surveys. These data have not been entered digitally, but have been archived.

1.9 By far the most widespread Broad Habitat was Improved Grassland, accounting for around 50 % of all agreement land, which when extrapolated is equivalent to around 61,000 ha across England. Of this, the majority was "Semi-improved/Improved", i.e. its ecological quality could be enhanced with appropriate and relatively low cost management. Habitat mosaics and other grassland habitats accounted for much of the remainder. The distribution of the Broad Habitats varied between MAFF regions depending upon the underlying distribution of the habitats, and on the scope and local priorities of the Scheme.

1.10 Priority Habitats accounted for 15 % of all agreement land (equivalent to around 18,500 ha). In addition to the 15%, there was also land within mosaics containing one or more Priority Habitat. The extra area of Priority Habitat within these mosaics is not calculable. The figure of 15% is likely to be an over-estimate, as the surveyors were instructed to regard habitat patches as Priority Habitat if in doubt, in order to trigger the use of the quadrat. The extent of this over-estimate cannot be given until methods for identifying Priority Habitats are better developed. Calcareous grassland (4 % of agreement land), heathland (4 %) and acid grassland (2 %) accounted for the greatest area of Priority Habitat. A further 2 % of agreement land was accounted for by two large saltmarsh agreements, while agreements with Cereal Field Margins were the most frequently encountered Priority Habitats, but only took up around 1 % of all agreement land.

1.11 The analysis of vegetation revealed that 53 % of all randomly-placed quadrats were categorised as the CVS class Infertile Grassland and 24 % as CVS class Fertile Grassland. The mean number of vascular plant, lichen and bryophyte species per quadrat was 22. The most diverse quadrat was found in chalk grassland and had 69 species, and the least diverse quadrat, on recently cleared ground, had 0 species. 117 of the 447 random quadrats (26%) were found to have been within Priority Habitats. No Red Data Book or Nationally Scarce species was found in quadrats outside Priority Habitats.

1.12 The quadrats within Priority Habitats had a slightly larger mean number of species per quadrat, of 24. The number of species found in Priority Habitats was not much higher than in the random quadrats because some Priority Habitats are not diverse e.g. moorland or some Cereal Field Margins, and also because the random quadrats also included some of the most diverse Priority Habitats. One Red Data Book species, *Thymus serpyllum*, and three Nationally Scarce species *Sesleria albicans, Carex humilis* and *Vulpia ciliata* ssp. *ambigua* were recorded within the quadrats. The vegetation of these quadrats had a lower proportion of CVS Aggregate Class (AC) Fertile Grassland, and a higher proportion of ACs Moorland Grass/ Mosaic and Heath/Bog than the randomly placed quadrats (note that randomly placed quadrats falling within Priority Habitats were double counted). Priority Habitat quadrats also contained NVC communities of conservation importance that were scarce or absent in quadrats falling outside Priority Habitats. They included calcareous grassland (CG1), heathland (H4) and mire (M10 and M21) communities.

1.13 There were no overall trends in species number or proportion of Priority Habitats with agreement age because differences in take-up between years swamped any effects of changing quality through time.

1.14 The correspondences of management codes and habitats were far from total, as several habitats can be found within a unit of land given a single management code. Nevertheless, the results were largely as one would have expected, except that there were frequent examples of grassland that had been identified as Highly Improved Grassland being given support for grassland management regimes such as lowland pastures and lowland hay meadows. This presumably occurred because the land was of landscape or historical importance.

1.15 Survey data were compared with results from the Countryside Survey 2000 on the basis of the three Environmental Zones (EZ1-3) that occur in England (Annex 12,Figure 1). Broadly the three zones can be described as eastern lowlands (EZ1), western lowlands (EZ2) and marginal uplands (EZ3). In EZ1 and EZ2, CSS land had a much higher proportion of grassland habitats and was much more likely to be typical of low fertility situations than the countryside as a whole in these zones. EZ1 and EZ2 also had a greater observed total number of species in grasslands and a greater mean number of species overall than the countryside as a whole. In EZ3, there was again a

greater proportion of grassland habitats (again, containing a higher proportion of infertile grassland than in CS2000), but with a reduced proportion of important upland broad habitats, such as Dwarf Shrub Heath and Bog. This suggests that the CSS has failed to target heather moorland so that it reached the same proportion as found in the countryside as a whole. However, the "countryside as a whole" included the ESAs which were ineligible for CSS. If the ESAs were removed from the analysis to give the "wider countryside", as used for reporting CS2000, then the proportion of the upland habitats found in the CSS would be higher.

1.16 The differences between the CSS and the countryside as a whole clearly reflect the priorities of the CSS, especially the high proportion of grassland. There are encouraging signs within this comparison that the Scheme has successfully included land of a different character than in the countryside as a whole and of a character likely to be considered of greater conservation value.

1.17 Overall, the results show that the Scheme has targeted grassland vegetation at higher proportions than found in the countryside as a whole. Moreover, this grassland tends to be less fertile than grassland in the countryside as a whole, suggesting an increased conservation quality. Furthermore, the presence of a high proportion of Priority Habitats, and the presence of scarce NVC communities, suggests that the Scheme has successfully targeted land of high conservation value.

1.18 The survey has shown a range of methodological issues that should be addressed in order to exploit fully the possibilities of interpreting the ecological quality of land under agri-environment schemes. They include:

- the development of appropriate statistics for testing for differences between CS2000 data and agreement land; and
- more evaluation of the correspondence between Broad and Priority Habitat definitions, the NVC, and the CVS classification to add to the preliminary work of ADAS (Critchley & Burke 1999) and CEH (Bunce *et al* 1999b).

1.19 We consider that we have produced a valid and informative comparative means of evaluating land under an agri-environment scheme with the countryside as a whole. This is an approach that would also have wide applicability to other schemes, as well as to other situations such as ESAs, nature reserves and Sites of Special Scientific Interest because the botanical quality of land within such sites could be compared to the countryside outside them. With adequate replication the method could be used to assess the different management codes, and the management prescriptions associated with them, but this has not been possible in this study. The reasons for this are that the management codes and the management prescriptions

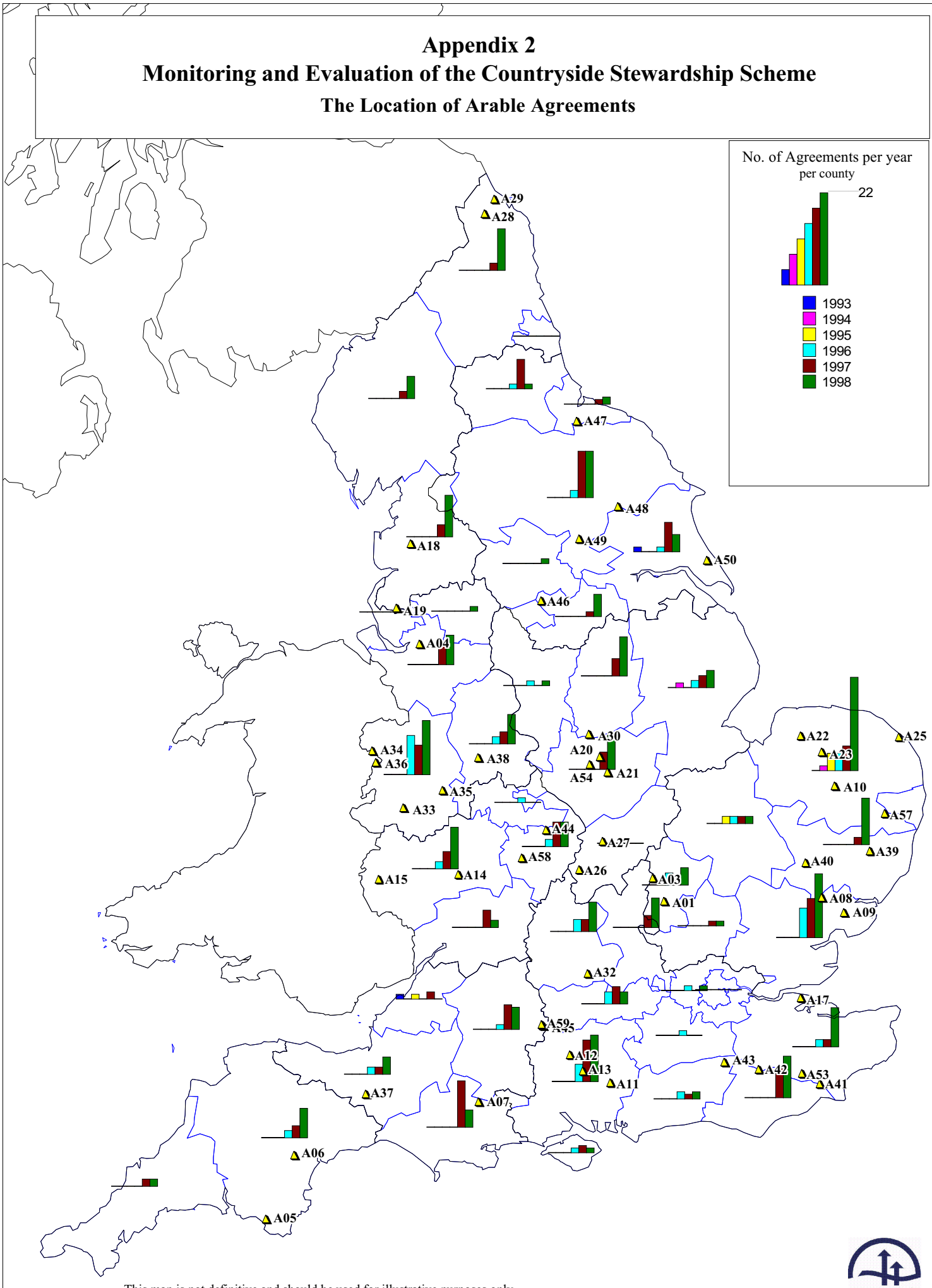
within the Scheme changed repeatedly through the years reducing the sample size for each code and/or prescription (see para 3.48).

1.20 The real value of this study will become apparent if the areas are resurveyed in the future, ideally at the same time as another Countryside Survey; only then will it be possible to judge the ecological value added to agreement land through time.

APPENDIX 2 - THE LOCATION OF SAMPLE AGREEMENTS

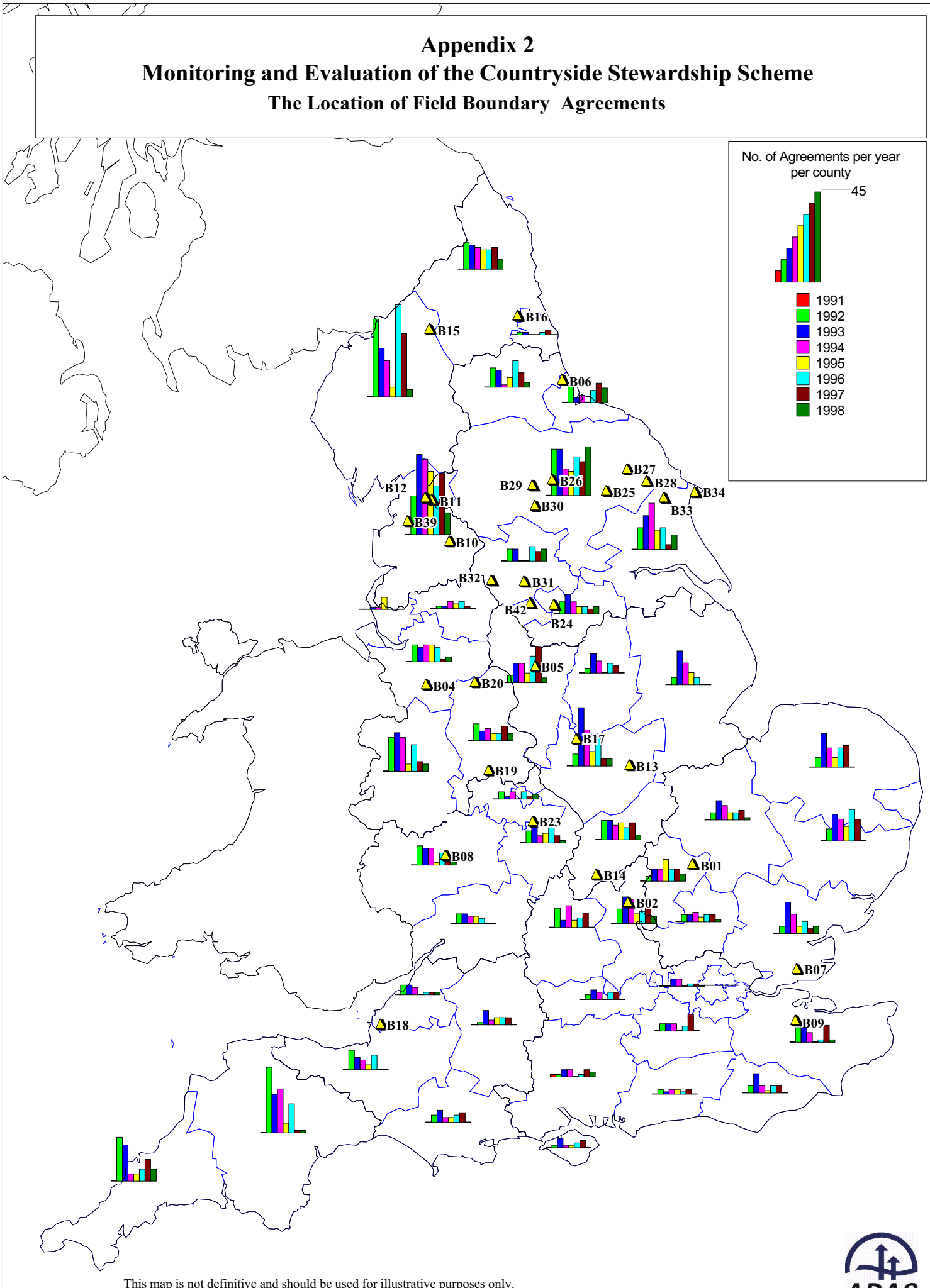
The following maps show the location of agreements in each of the landscape type samples.

Appendix 2
Monitoring and Evaluation of the Countryside Stewardship Scheme
The Location of Arable Agreements



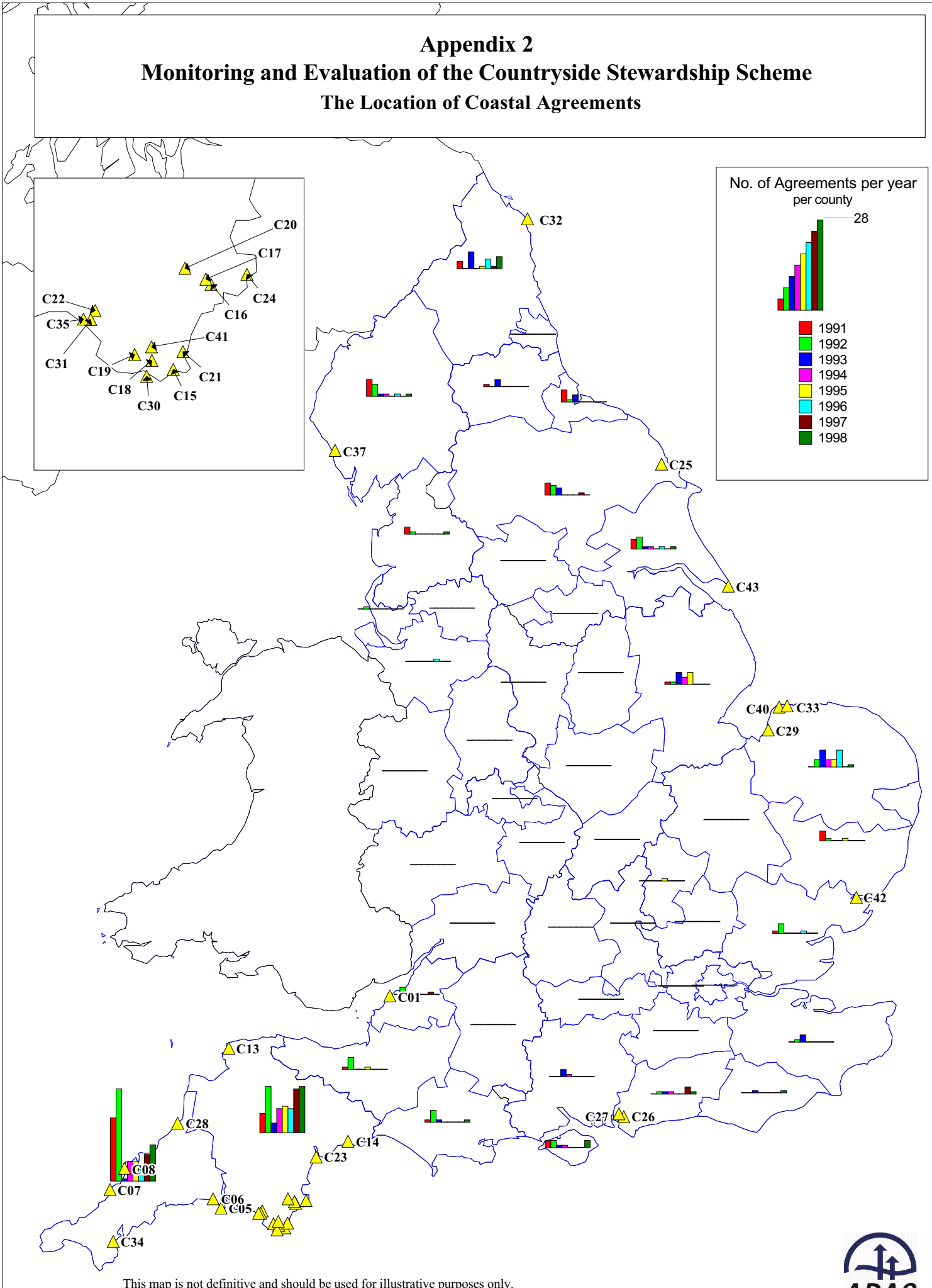
This map is not definitive and should be used for illustrative purposes only.
Cartography by Jo Faulkner ADAS Aberystwyth.

Appendix 2
Monitoring and Evaluation of the Countryside Stewardship Scheme
The Location of Field Boundary Agreements



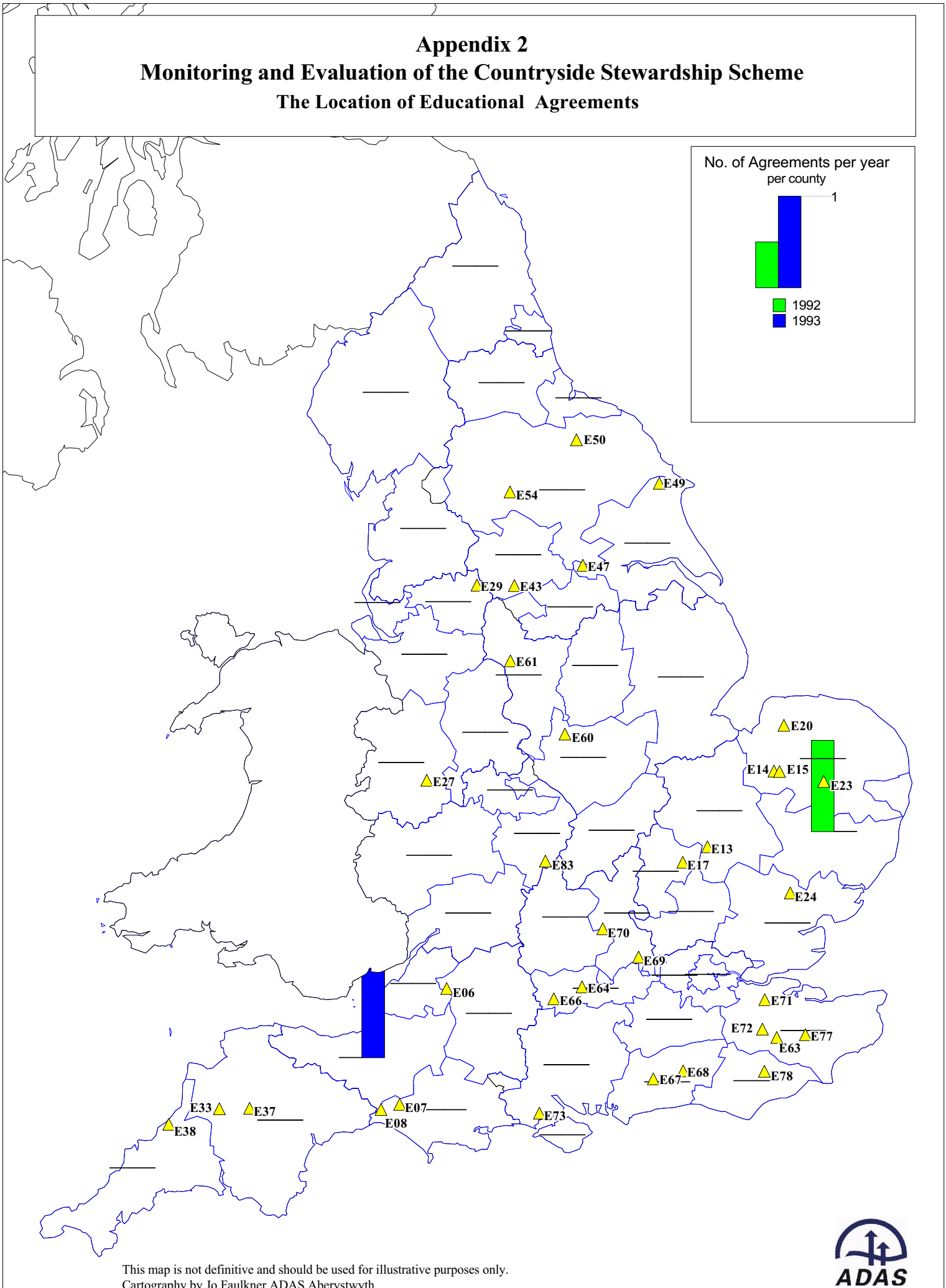
This map is not definitive and should be used for illustrative purposes only.
Cartography by Jo Faulkner ADAS Aberystwyth.

Appendix 2
Monitoring and Evaluation of the Countryside Stewardship Scheme
The Location of Coastal Agreements



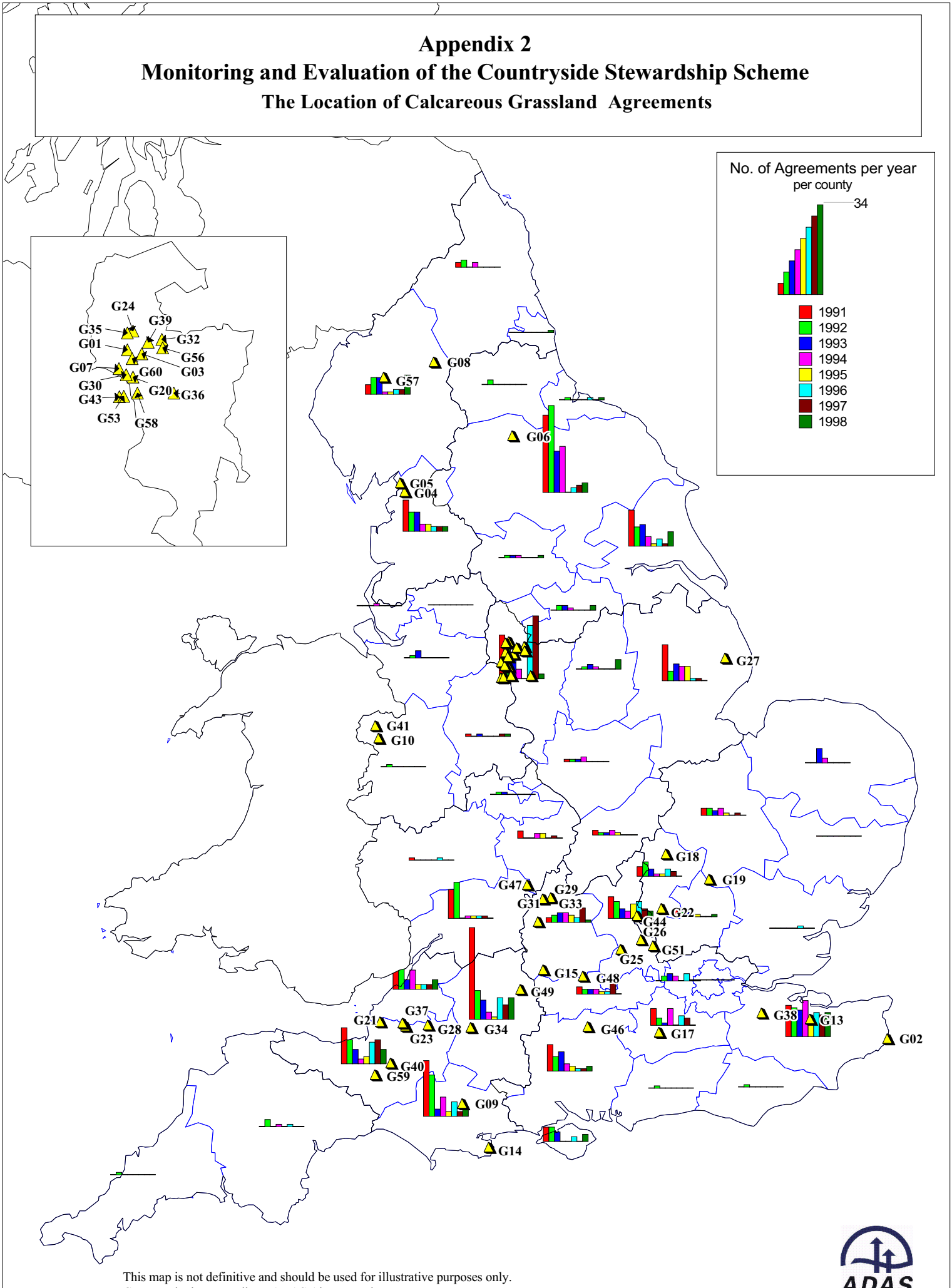
This map is not definitive and should be used for illustrative purposes only.
Cartography by Jo Faulkner ADAS Aberystwyth.

Appendix 2
Monitoring and Evaluation of the Countryside Stewardship Scheme
The Location of Educational Agreements



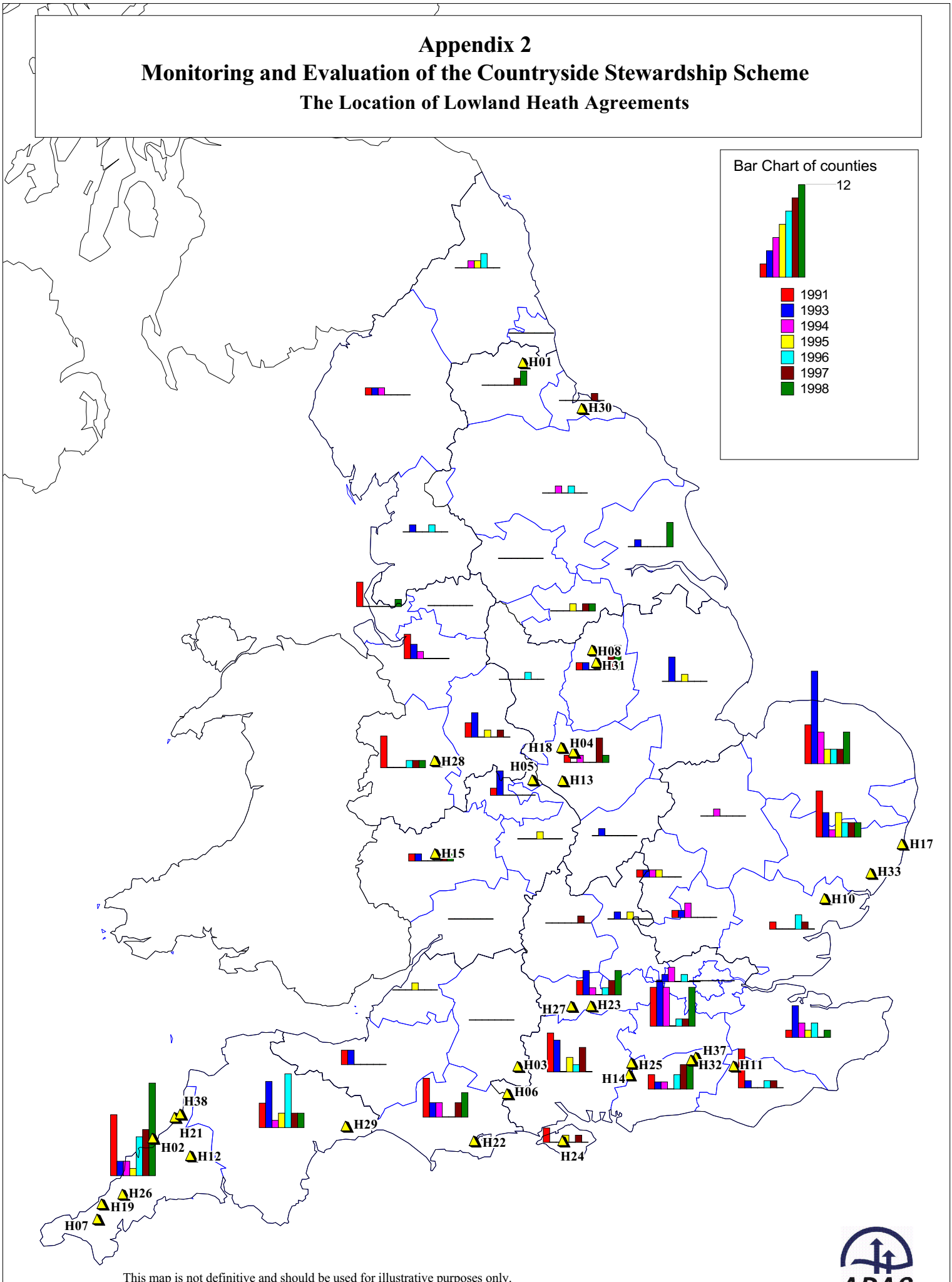
This map is not definitive and should be used for illustrative purposes only.
Cartography by Jo Faulkner ADAS Aberystwyth.

Appendix 2
Monitoring and Evaluation of the Countryside Stewardship Scheme
The Location of Calcareous Grassland Agreements



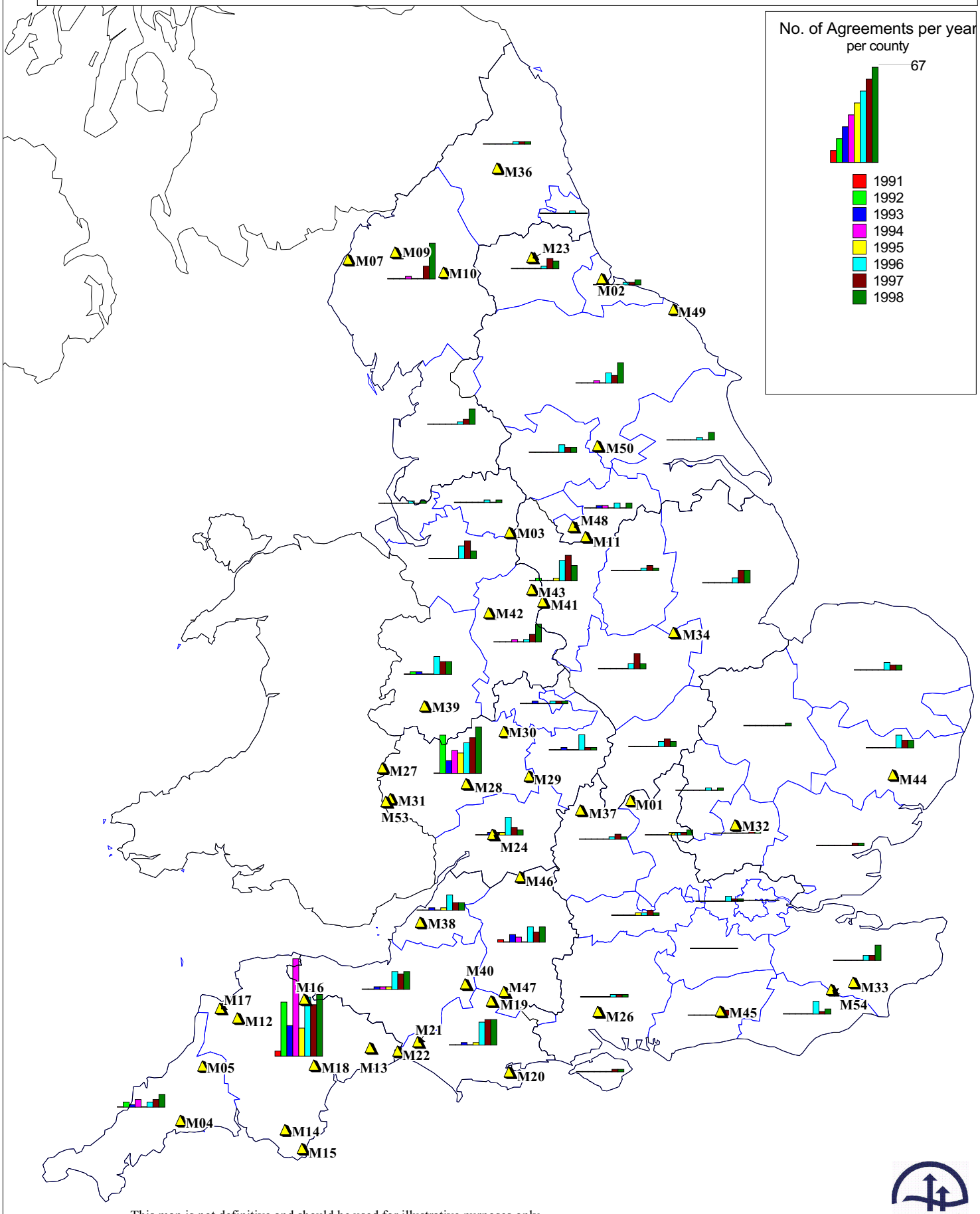
This map is not definitive and should be used for illustrative purposes only.
Cartography by Jo Faulkner ADAS Aberystwyth.

Appendix 2
Monitoring and Evaluation of the Countryside Stewardship Scheme
The Location of Lowland Heath Agreements



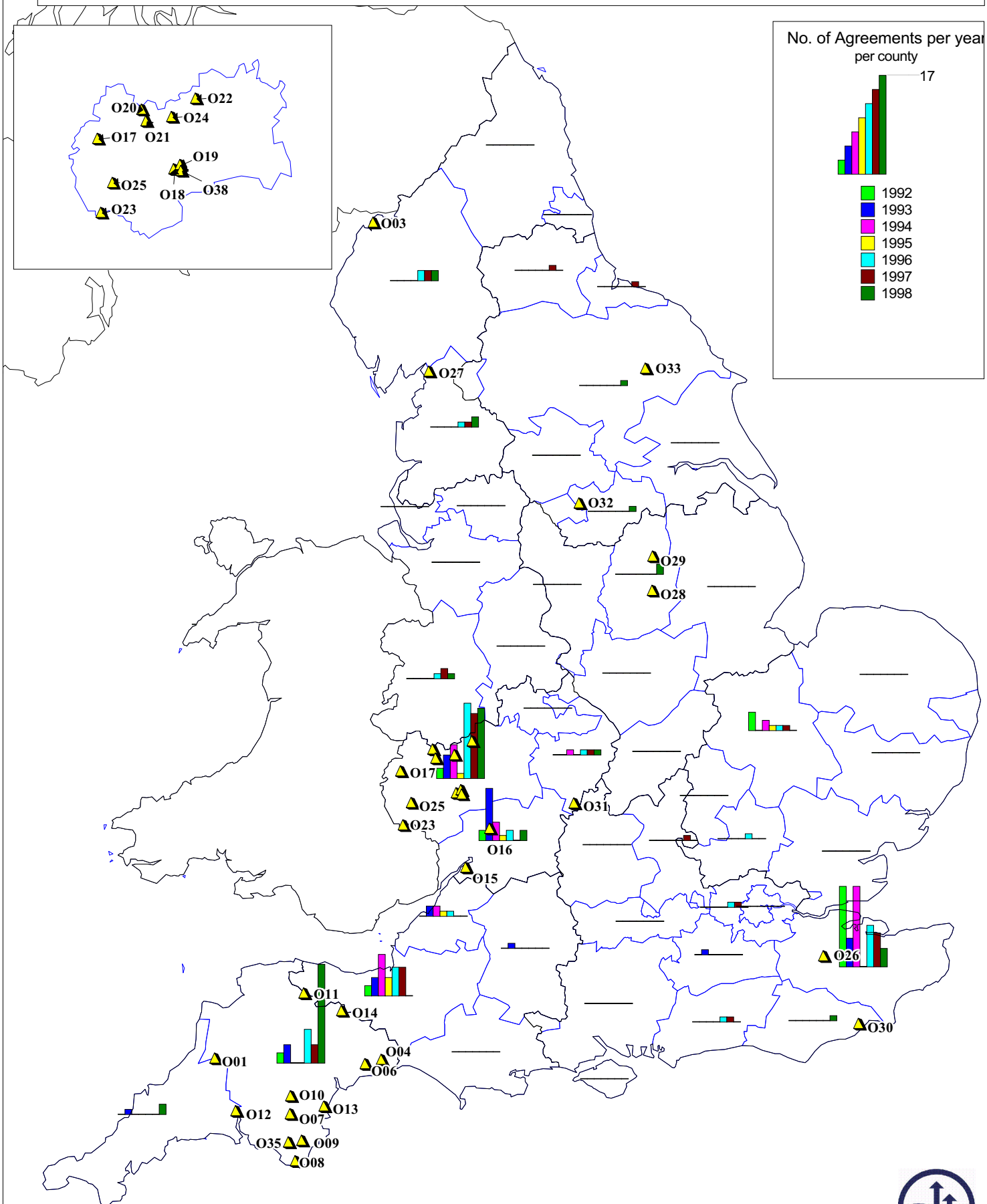
This map is not definitive and should be used for illustrative purposes only.
Cartography by Jo Faulkner ADAS Aberystwyth.

Appendix 2
Monitoring and Evaluation of the Countryside Stewardship Scheme
The Location of Meadow Agreements



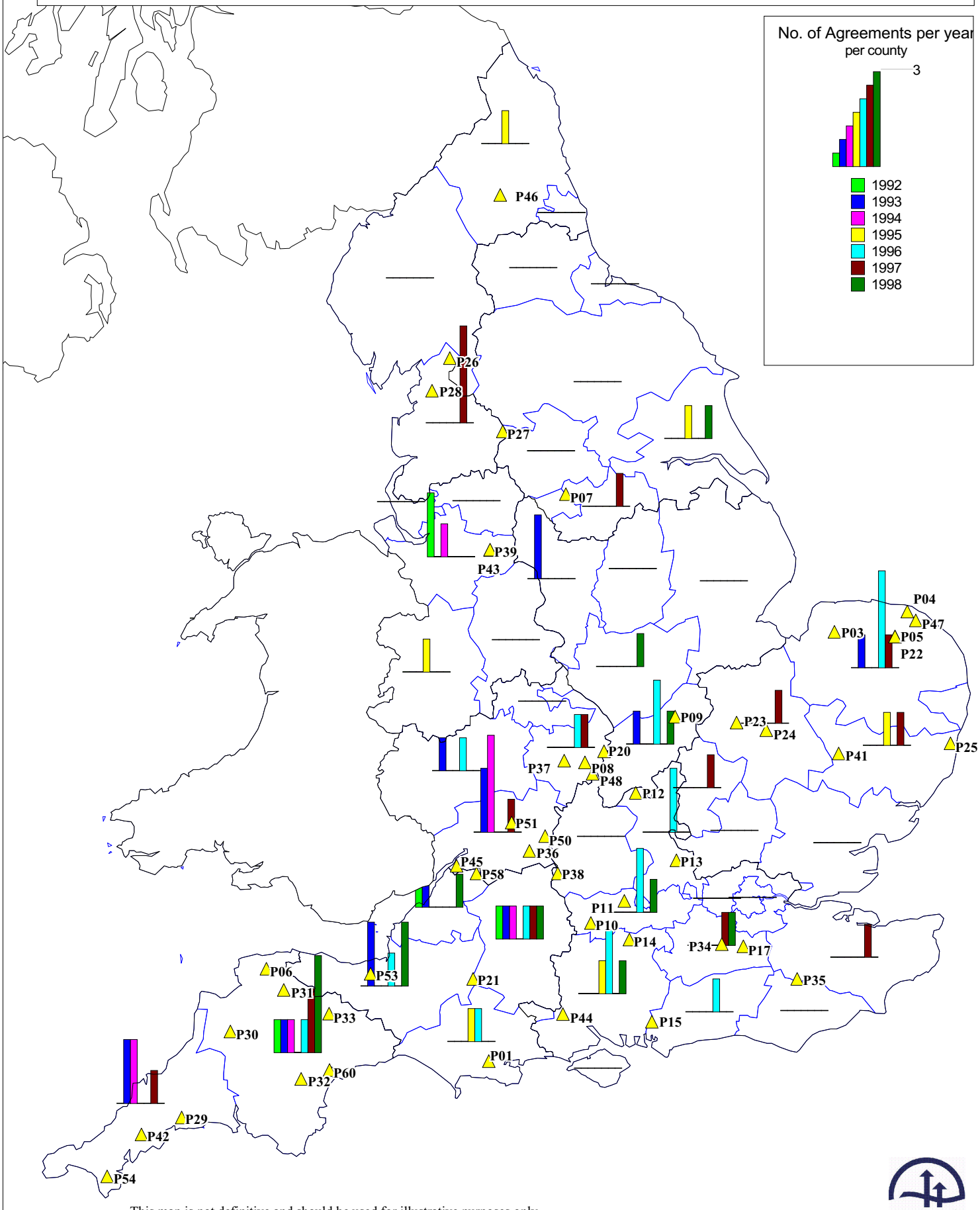
This map is not definitive and should be used for illustrative purposes only.
Cartography by Jo Faulkner ADAS Aberystwyth.

Appendix 2
Monitoring and Evaluation of the Countryside Stewardship Scheme
The Location of Orchard Agreements



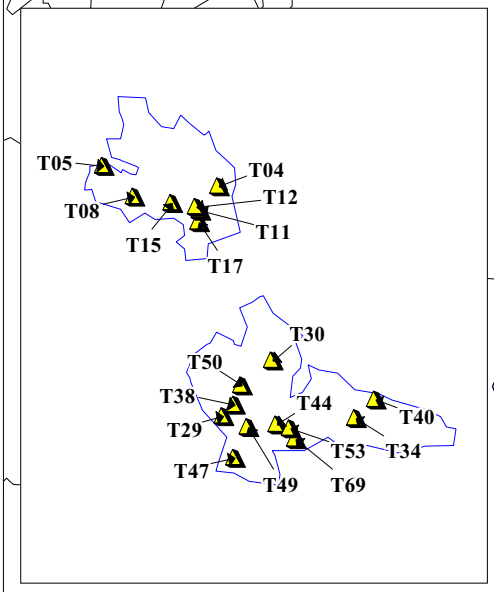
This map is not definitive and should be used for illustrative purposes only.
Cartography by Jo Faulkner ADAS Aberystwyth.

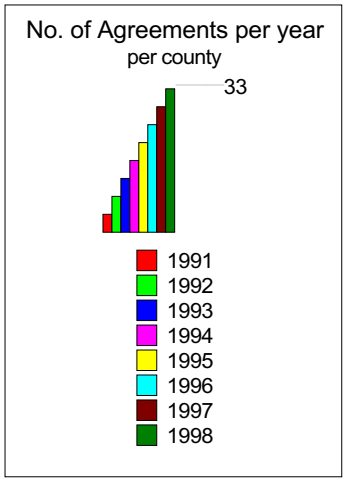
Appendix 2
Monitoring and Evaluation of the Countryside Stewardship Scheme
The Location of Historic Parkland Agreements



This map is not definitive and should be used for illustrative purposes only.
Cartography by Jo Faulkner ADAS Aberystwyth.

Appendix 2
Monitoring and Evaluation of the Countryside Stewardship Scheme
The Location of Countryside Agreements around Towns

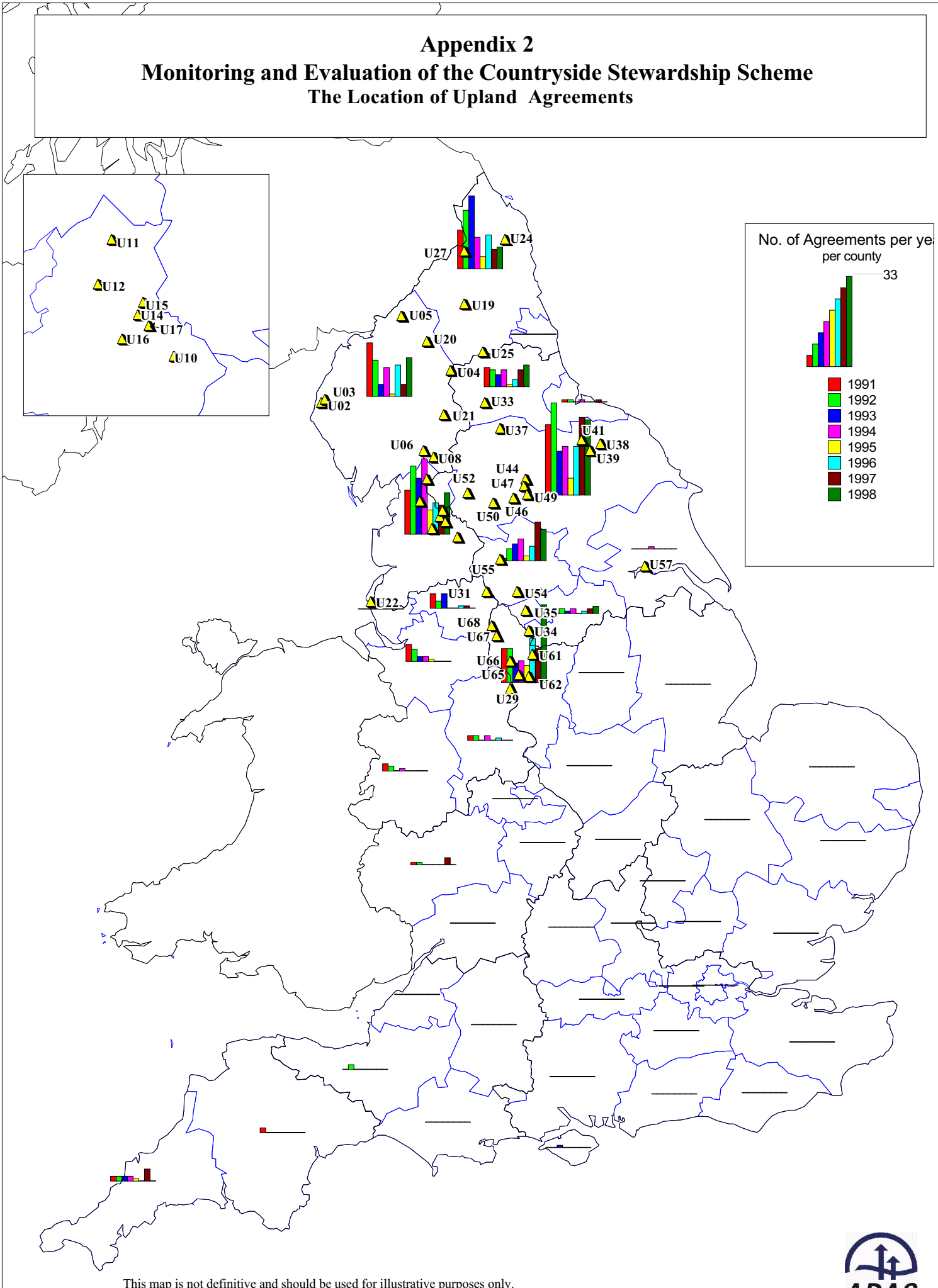




This map is not definitive and should be used for illustrative purposes only.
Cartography by Jo Faulkner ADAS Aberystwyth.

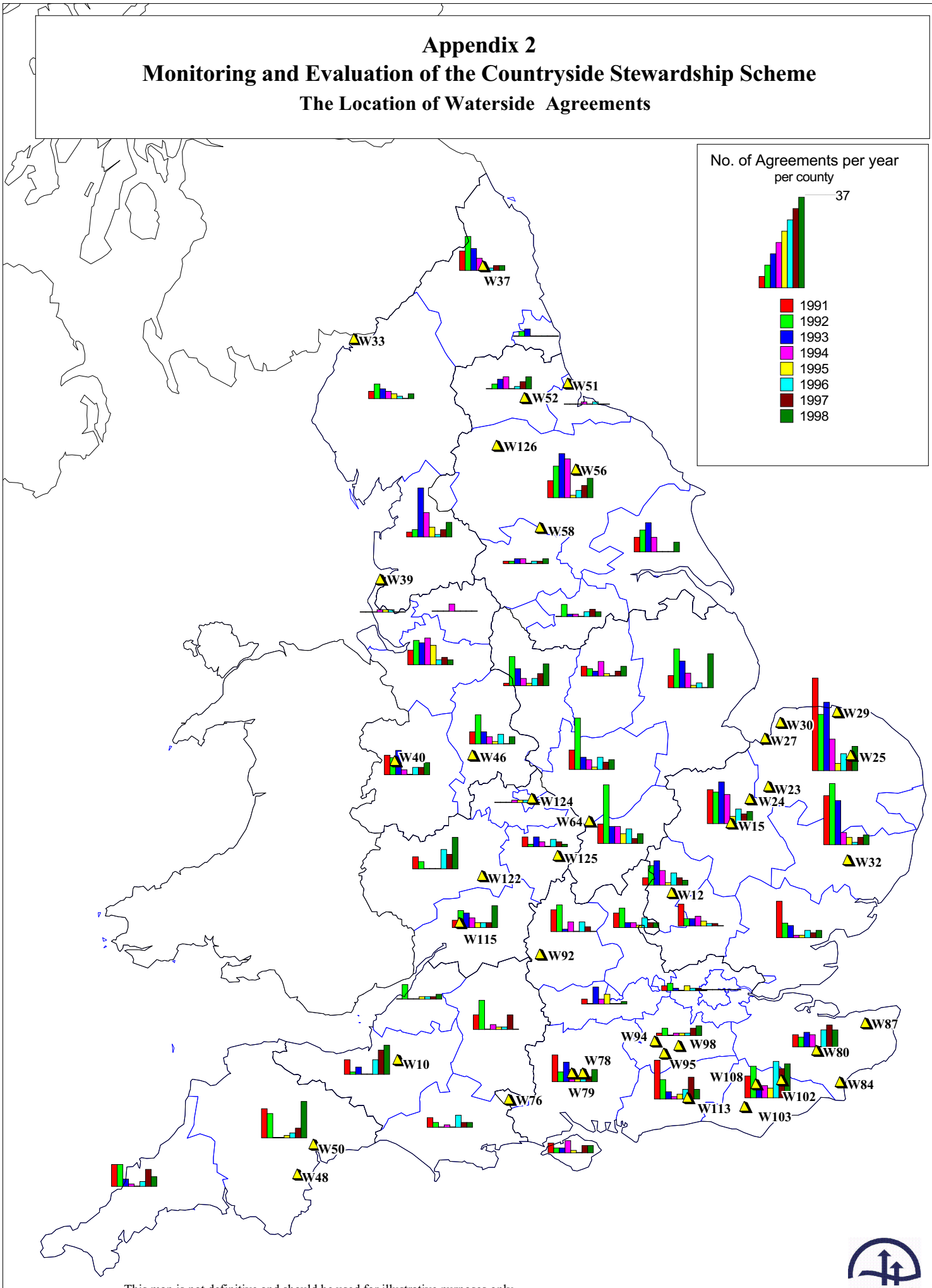
ADAS

Appendix 2
Monitoring and Evaluation of the Countryside Stewardship Scheme
The Location of Upland Agreements



This map is not definitive and should be used for illustrative purposes only.
Cartography by Jo Faulkner ADAS Aberystwyth.

Appendix 2
Monitoring and Evaluation of the Countryside Stewardship Scheme
The Location of Waterside Agreements



This map is not definitive and should be used for illustrative purposes only.
Cartography by Jo Faulkner ADAS Aberystwyth.

APPENDIX 3 - APPRAISAL SCORING SYSTEM - DESCRIPTORS

	NEGATIVE ASSESSMENT	*POSITIVE ASSESSMENT*
	AGREEMENT NEGOTIATION	
Q1	Score has little rationale and takes little account of historic, landscape or ecological features, or access.	Score is both rational and effective and takes full account of historic, landscape and ecological features, and access where appropriate.
Q2	Written advice is poorly presented, unclear unhelpful, shallow and misleading.	Written advice is well presented, clear, helpful, comprehensive and thorough.
Q3	Changes made detract from the agreement.	Changes made make an important contribution to improving the agreement.
Q4	Minimal involvement of the PO, little pre- or post-application support. Little interest from other organisations.	PO fully involved at all stages, good and positive pre- and post-application support. Good involvement from other agencies where appropriate.
Q5	Farmer's experience is of poor and unhelpful advice which caused concern and did little to further the application process.	Farmer's experience is of good, helpful advice that improved the application process.
Q6	A number of environmental opportunities exist on the farm which could have been included in the agreement.	No missed opportunities - all key environmental features have either been included in agreement, or are covered by x-compliance, or separate funding.
	APPROPRIATENESS	
Q7	Agreement objectives are not appropriate for the site, or are not feasible, given the nature of the site.	Objectives are wholly appropriate, and are feasible.
Q8	Management prescriptions are not appropriate to achieve the objectives for the agreement.	Management prescriptions are wholly appropriate to achieve the objectives for the agreement.
Q9	Agreement objectives do not accord with the Scheme objectives.	Agreement objectives fully accord with the Scheme objectives.
Q10	Agreement does not accord with agreed targeting strategy.	Agreement fully in accordance with agreed targeting strategy.
	ENVIRONMENTAL EFFECTIVENESS	
Q11	The quality of the landscape is neither being enhanced nor maintained by the agreement.	The quality of the landscape is both maintained and enhanced by the agreement.
Q12	Biodiversity, historic features, access and landscape are neither being enhanced nor maintained.	Biodiversity, historic features, access and landscape are being both maintained and enhanced.
Q13	High quality features are neither maintained nor enhanced by the agreement.	High quality features are both maintained and enhanced by the agreement.
Q14	Management plans have not been used appropriately and effectively as part of the agreement.	Management plans have been used effectively and appropriately as part of the agreement.

Q15	Special projects have not been used appropriately and effectively as part of the agreement.	Special projects have been used effectively and appropriately as part of the agreement.
	COMPLIANCE	
Q16	Agreement holders are unlikely to comply with the agreement. Field survey shows evidence of non-compliance.	Agreement holders are likely to fully comply with the agreement. Field survey shows evidence of compliance.

Q17	Agreement holder not interested in environmental objectives, motivated by economic or agricultural factors	Agreement holder's attitudes and motivations fully accord with environmental objectives of the Scheme.
Q18	Cross-compliance elements of the agreement are unlikely to be met.	Cross-compliance elements of the agreement are likely to be fully met.
Q19	The agreement holder is unlikely to be able to carry out the work prescribed in the agreement.	The agreement holder is fully able to carry out the work prescribed in the agreement.
Q20	The agreement holder is wholly dissatisfied with the agreement.	The agreement holder is fully satisfied with the agreement.
Q21	The land would have been managed identically in the absence of the Scheme. (i.e. little or no additionality)	There may have been serious environmental damage in the absence of the Scheme. (i.e. considerable additionality)
	SIDE EFFECTS	
Q22	The agreement may lead to damage to other environmental quality on the holding.	The agreement is likely to lead to both maintaining and enhancing other environmental quality not specifically covered by the agreement objectives.
Q23 (a)	Environmental quality on the rest of the holding is likely to be damaged.	Environmental quality on the rest of the holding is likely to be maintained or enhanced.
Q23 (b)	Agreement may lead to the environmental damage on adjacent land outside the holding.	Agreement enhances and improves the environmental quality on adjacent land outside the holding.
Q24	The agreement objectives do not accord with other (identifiable) applicable environmental policy designations.	The agreement objectives are fully in accord with other (identifiable) applicable environmental policy designations.

APPENDIX 4 - STATISTICAL ANALYSIS OF THE APPRAISAL SCORES

In this appendix the scores created during the appraisal process for the five first generation criteria are analysed statistically and provide an indication of the importance of the year an agreement was signed, regional differences in the scores and the relative scores of different lead landscape types. In addition an analysis is carried out than can help to visualise how the Scheme is performing overall in relation to the five criteria.

Factors affecting the appraisal scores

The effects of lead landscape type, year of agreement, and MAFF Regional Service Centres on the scores for each agreement were explored using Generalised Linear Modelling in MINITAB 12 as an unbalanced Analysis of Variance. Models were created for each of the first generation criteria relating lead landscape type to appraisal score, year of agreement to score and RSC to score. Models were created relating lead landscape type and RSC to score, and year of agreement and RSC to score. An analysis modelling lead landscape type with year was not possible because all the agreements for each lead landscape type were evaluated in a single year. The 16 agreements from the Countryside Around Towns, Historic Landscape (Parklands) and Coastal lead landscape types, that were not signed in the year of the main sample were not included in the analysis comparing scores by year, leaving n=464. The results of the analyses are shown below in Table A4.1, where n is the number of Agreements in the analysis, df = degrees of freedom, F is the F statistic (meaning - fantastic , NS is not significant, * is significant at the 5% level and *** is significant at the 0.1% level.

Table A4.1 – The results of statistical analysis of the appraisal scores.

Criterion	Lead Landscape	Year	RSC	Lead Landscape & RSC	Year & RSC
	n=480, df=11	n=464, df=2	n=480, df=8	n=480, df=11,8	N=464, df=2,8
Agreement Negotiation	F=3.52 ***	F=16.61 ***	F=1.74 NS	F=3.52, F=1.78 *** , NS	F=16.00, F=1.65 *** , NS
Appropriateness	F=1.46 NS	F=2.00 NS	F=1.20 NS	F=1.50, F=1.26 NS , NS	F=2.23, F=1.26 NS ,NS
Environmental Effectiveness	F=3.60 ***	F=13.01 ***	F=2.35 *	F=2.88, F=1.44 *** , NS	F=10.37,F=1.75 *** , NS
Compliance	F=3.41 ***	F=15.72 ***	F=1.67 NS	F=3.02, F=1.19 *** , NS	F=13.65,F=1.22 *** , NS
Side Effects	F=1.65 NS	F=1.08 NS	F=1.13 NS	F=1.64, F=1.13 NS , NS	F=1.49, F=1.23 NS , NS

Analysis of all criteria

Each appraisal of an agreement produced scores for each of the five first generation criteria. These five scores produce a pattern or signature for each agreement e.g.

+4,+3,+3,-2,0. The signatures could fall into certain detectable clusters. Some clusters would be obvious e.g. agreements that scored highly in all criteria would fall into one cluster whilst those that had low scores for all criteria would form another cluster. Other clusters would not be so obvious e.g. where some criteria had high scores and others medium or low scores e.g. there could have been a cluster that scored well for negotiation, appropriateness, and environmental effectiveness but scored poorly for compliance. The problem is that the human brain is not capable of visualising five dimensions, and so seeing clusters of agreements based on the scores for the five criteria is not possible. However, there is a multivariate technique that can form one, two or more axes from a large number of starting variables. This technique, Principal Components Analysis (PCA), was used to create a 2-axis representation of the 5 first generation criteria. In this way any clustering in the scores for the agreements could be visualised in two dimensions.

The way PCA works means that the mean score for agreements on each axis is at point 0. Therefore on Figure A4.1 the point 0,0 is the mean score given to the agreements for all 5 criteria. An ellipse has been drawn around the 95% of agreements closest to the mean.

The results of the analysis show that there were no distinct clusters in the scores for agreements when the two axes are plotted against one another (Figure A4.1). Although the PCA did not detect recognisable clusters, the plot does provide a useful indicator of agreements that were very different from the majority i.e. dots on the graph that are a long way from the others. These outliers can be explained once the meaning of the axes are established from the PCA results. The PCA results table gives information on which of the variables (i.e. the 5 first generation criteria) contributed to the two axes. Axis 1 is inversely related to scores for all five criteria (but more especially Negotiation, Appropriateness and Effectiveness) so that agreements that had all high scores are to the left of Figure A4.1 and those agreements that had all low scores are to the right. The second axis is inversely related to high scores for Compliance and Side Effects and to a lesser extent related to scores for the other three criteria. Translating this to Figure A4.1, high scores for Compliance and Side Effects are at the bottom and low scores are at the top.

The ellipse around 95% of the agreements is quite small and this shows that there was a great deal of similarity in the signatures of all the sample. To understand whether these similar scores were good, bad or indifferent, an illustration of where a good and an adequate agreement would be placed on the graph is needed. Using the calculated statistics provided by the PCA, it was possible to draw a point representing a good agreement that scored +3 for all of the criteria (apart from side effects which was given a score of +1) and another point for an adequate agreement that scored +2 for all criteria (again side effects given a score of +1).

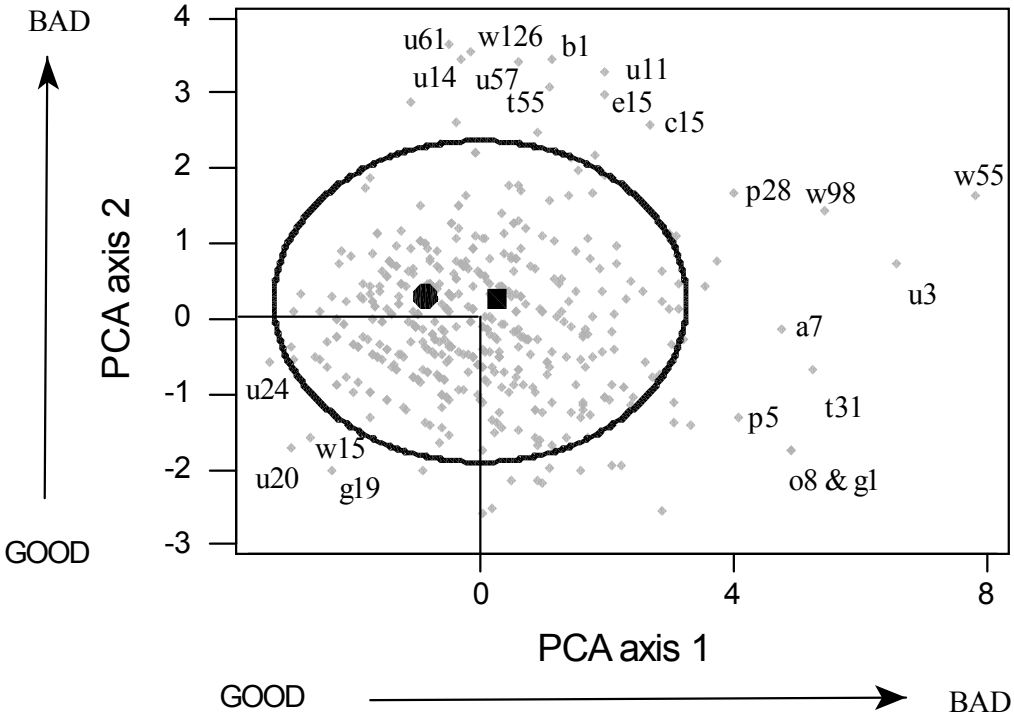
The mean score for all agreements is below and to the left of the point that would be given to an agreement with all +2 scores (i.e. the mean score represents a point that scores higher than +2 for all criteria) and is close to the point that would be given to an agreement that scored +3 for all criteria. This means that the Scheme is performing adequately for all criteria as a whole and is close to performing well. The small area enclosed by the ellipse containing 95% of the agreements is also encouraging because this means that there is a great deal of uniformity in the standard of agreements. The small area of the ellipse also indicates that the remaining 5% of agreements, the

outliers, had a large effect on the mean score for all agreements. The position of the ellipse in the bottom left corner (that represents high scores for all criteria) shows that the outlying agreements, to the top and right, were the few agreements that scored very badly.

The labelled points are the extreme outliers and the label gives the letter of the topic report e.g. u is upland and the number is the holding within that topic. In the lower left corner are the best agreements (U20, W15, G19 and U24). The descriptions of these agreements can be found in the topic reports. The outliers to the top and right of the diagram are the worst agreements and are the small number that probably should never have been accepted into the Scheme.

If in the future the few agreements that had low scores for all criteria could be eliminated then the mean of the 2 axes would reach the point that represents the score of +3 for all criteria or be below and to the left of it.

Figure A4.1 – Diagram of PCA axes. The point 0,0 is the mean of all the agreements; the solid circle is the position of an agreement scoring 3 for all criteria (side effects +1) and the square is the point that represents an agreement scoring +2 throughout (side effects +1). The ellipse encloses 95% of the sample. The agreements that are extreme outliers are labelled with the codes they were given in the topic reports.



APPENDIX 5 - IDENTIFICATION OF MISSED OPPORTUNITIES

The concept of "missed opportunities" in the CSS monitoring reports is liable to a variety of interpretations. To ensure a consistent approach, an explicit method of determining whether an opportunity had been missed was developed at the beginning of the monitoring project. The chart on the following page shows the decision making steps involved in judging whether an opportunity had been missed. A fuller explanation is given below.

1. Is the feature in agreement? Clearly, if the feature is in the agreement, then it is not a missed opportunity.

2. Is the feature important? By important we mean of significant environmental value. Failing to put an unimportant feature in the agreement (such as an improved grassland) is not a missed opportunity.

3. Has the feature been considered and rejected? If a valuable feature has been considered and rejected either by the Agreement Holder or the PO, then it cannot be considered as having been missed. It has often been difficult to determine this, as there is no formal requirement to document all the features which have been considered but rejected. In any event, both the Agreement Holder and the PO need to be aware so that damage can be avoided if at all possible. Where documentary evidence of features being considered, they have not been classed as missed opportunities.

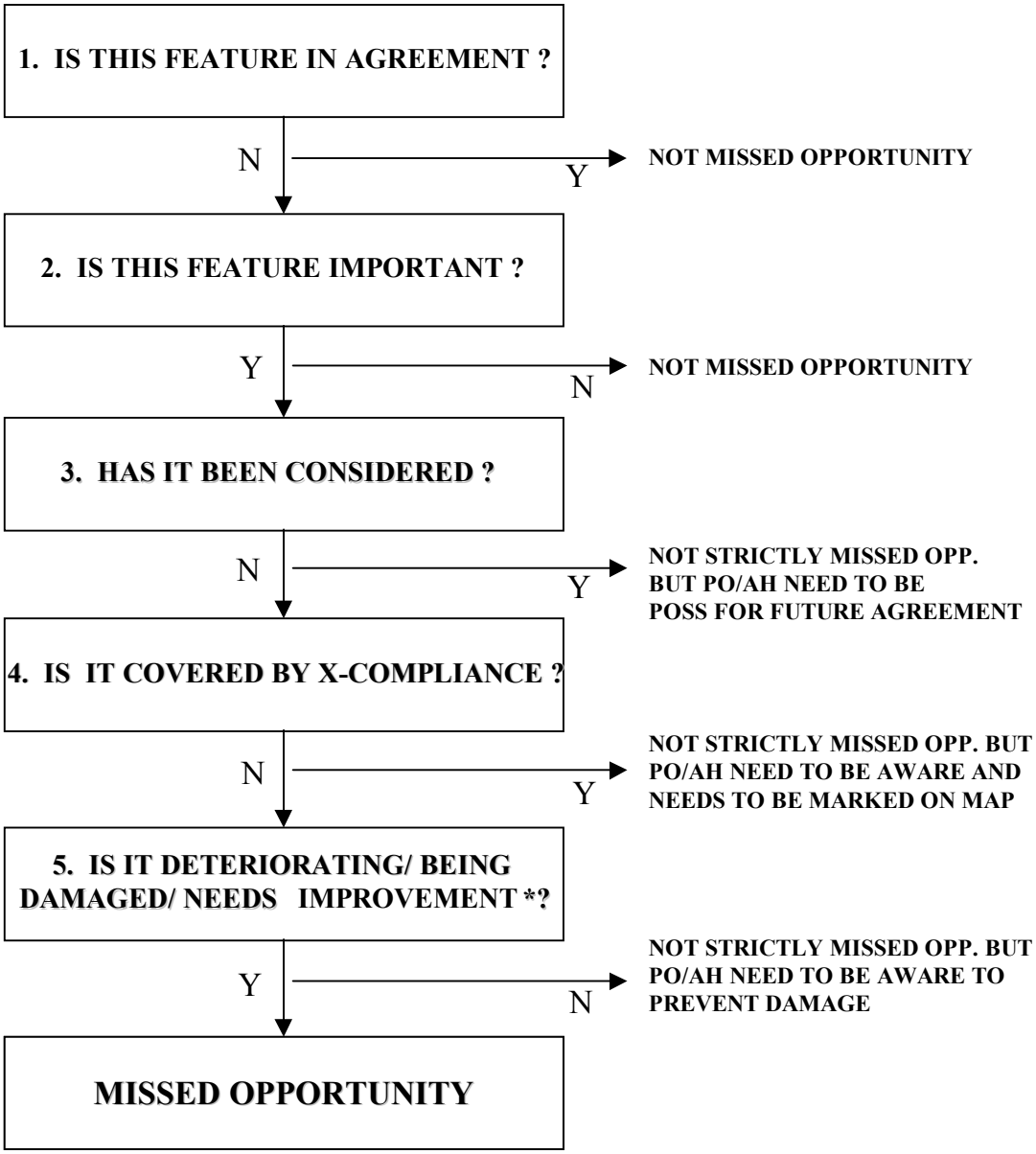
4. Is the feature covered by cross-compliance? If the feature is covered by cross-compliance, then it is not strictly a missed opportunity, but the agreement holder needs to be aware of the importance of the feature, and the cross compliance protection it has.

5. Is the feature deteriorating, being damaged or in need of improvement? If the feature is being damaged or otherwise deteriorating, and the agreement does not address this, then this is a case of a missed opportunity. The appraisal team has also included as missed opportunities the failure to implement an improvement when there was a particularly good and cost effective opportunity to do so. This included arable field margins adjoining SSSIs, arable reversion in parkland, access to good view points and the removal of visually intrusive landscape features in areas of high landscape value.

Missed access opportunities are particularly difficult to assess, as many agreement holders already have public access to parts of the site or may be reluctant to encourage additional access provision. The project team took the view that improved access may have been appropriate where a site was close to existing access routes, where it offered the means to link routes or allow access to particularly fine views or where there was opportunity to improve public or educational access provision, including disabled access. In these cases this issue should have been addressed in the agreement negotiations.

It was also difficult to judge missed opportunities on sites with previous CSS agreements, where the precise location of any previous agreements was unclear from the evidence available to the appraisal team.

IDENTIFICATION OF MISSED OPPORTUNITIES



*** In certain cases the failure to implement an improvement has been classified as a missed opportunity, where there was a particularly good and cost effective opportunity to do so. This included arable field margins adjoiningSSSIs, arable reversion in parkland, access to viewpoints, and removal of intrusive landscape features in areas of high landscape value.**

APPENDIX 6 - REVIEW OF AGREEMENT DOCUMENT

Introduction

The documentation that accompanies the written agreement was reviewed by the appraisal tem. It was revised by MAFF in 2000 and this review takes account of that revision. The documentation contains a number of sections:

- The 'Agreement' (signed by MAFF and the agreement holder),
- The agreement objectives,
- Schedule 1 - The agreement map,
- Schedule 2 - The management of agreement land,
    - 2.1 Baseline management prescriptions (terms applicable to all land under schedule 2.2.1, 2.2.2, 2.2.3 etc.).
    - 2.2 Prescriptions applicable to land specified
    - 2.4 Cross compliance - boundaries (covering red, green and orange boundaries.)
    - 2.5 Management prescriptions - red boundaries.
- Schedule 3 - Annual payments,
- Schedule 4 - Capital works,
- Schedule 5 - Supplementary guidance notes, and
- Management plans.

This appendix reviews the strengths and weaknesses of each of these sections within the current agreement, using information provided during the full CSS appraisal process.

Overall Contents

A recurrent theme within the individual landscape topic reports was that the whole agreement needed to be more thoroughly cross referenced. Essentially the 'Agreement' itself, the Schedules, any management plans and supplementary guidance need to be pulled together into a single document. This document may benefit from a contents page. A draft of such a contents page is set out in Appendix 7 below.

The 'Agreement'

The role of the first section, called the 'Agreement', is to cover the legal and general administrative aspects of the agreement and in this respect it contains the signatures of those party to the agreement. There is also a section concerned with the environmental standards that apply to the holding.

Strengths include:

- It has been found by MAFF to be legally robust.

Weaknesses include:

- The title suggests that this is the whole agreement, and therefore this casts doubt in the minds of some agreement holders as to purpose of other parts of the document;
- The definition of agreement land could be clearer in both language and substance. This can be confusing. Some clauses in the agreement (particularly related to the baseline management descriptions) apply to the whole holding, others solely to the agreement land.
- The 'Agreement' contains (in para 3) cross compliance details across the whole holding. As it currently stands, the term cross compliance is not used. The impact of the cross compliance section can be lost among all the administrative detail. To improve this it may be useful to consider a new section within the agreement devoted wholly to cross compliance (which could include Schedule 2.1 and 2.4).
- The agreement stipulates that the agreement holder has to abide by standards of Good Farming Practice. As written, this clause applies to the agreement holder, not the holding. A more appropriate phrasing might be "The Agreement Holder agrees:...to ensure the holding is managed in accordance with the standards of Good Farming Practice..."
- Agreement holders must also retain copies of the Codes of Good Agricultural Practice, and, where appropriate, follow their recommendations. The codes are lengthy documents and an agreement holder may not be aware of their implications on a particular holding. It is important that all agreement holders understand that they are responsible for the practices that occur on their land, and should any of these not be in accordance with the Codes of Good Agricultural Practice then they may be in breach of their agreement.

The Agreement Objectives

The agreement objectives set out in simple terms what the agreement is trying to achieve. This section is laid out by environmental aspect, i.e. Wildlife, Landscape, History/Archaeology and Access, and rarely runs to longer than two pages, typically just one page.

Strengths included:

- Over the three years of the monitoring period, there was a rise in the number of agreements which had this section documented on file.
- Similarly objectives also improved in quality. They tended to be more site specific and provided more detail.
- The use of a standard template to structure the objectives by the four environmental aspects was seen as good practice. It was felt that this encouraged the consideration of all environmental aspects in the agreement, and formed a logical structure upon which to develop prescriptions.
- The reference to other agreements on the holding (Stewardship or otherwise) within objectives was also seen as good practice.

Weaknesses identified by the appraisal team included:

- Omissions. Objectives should be stated for each of the four aspects of the scheme wherever possible, in order to confirm that each has been addressed.
- Vagueness. Objectives were often vague. For example, one access objective was to "maintain any existing informal public access". The appraisal team felt that where issues like this can be clarified they should be. Another objective was to "retain features which may have a historic/archaeological value". In both cases there was no record on the file indicating the location so it is impossible to assess compliance.
- Objectives without matching prescriptions. There were a number of cases where objectives had no matching management prescription. Care should be taken to ensure that all objectives have prescriptions to enable them to be achieved, and that all prescriptions further one or more of the agreement objectives.
- Wrongly classified. Occasionally some objectives are mis-classified in terms of their environmental aspect. For example, where landscape objectives in an agreement were actually wildlife objectives.
- Inappropriate objectives. Agreement objectives were not always feasible because they may be over ambitious in terms of the environmental benefit they hope to secure. Other objectives were over ambitious because they would not provide any worthwhile benefit. For example, a recurrent objective related to the reversion of improved land via pasture management on calcareous grassland. In this case the environmental benefit included in the objective could take much longer than 10 years to occur.
- Not mentioning designations or previous agreements. Objectives were not always thorough in identifying existing environmental designations. For example for year 3 agreements only 12 out of 79 designations on the sample holdings were mentioned in the agreement objectives. There is a risk that agreement holders remain unaware of their existence or relevance. It was felt that objectives should always include environmental designations where these exist. For example, some objectives omitted to include Biological or World Heritage Sites where they occurred on the holding.
- Not updated. There were occasions where elements of the scheme have been removed from the agreement, but not from the objectives.

Schedule 1 - The Agreement Map

Schedule 1 provides the agreement map. Its purpose is to provide a clear and immediate visual guide to the major activities being undertaken as part of the agreement. In general the level of mapping quality was high, and the colour maps provided a very useful "at a glance" guide to the agreement.

Strengths included:

- Maps that showed both the old and new Scheme agreements. This should be encouraged to include designations and become more widespread.

Weaknesses included:

- Despite the general high level of mapping accuracy, there were still a number of occasions when maps were wrong. For example, PROW not marked on the

agreement map.

- Boundaries caused a number of problems. For example, where those marked on the OS base map used for the agreement did not now exist on the ground. Equally in one or two cases relic boundaries, of historical importance, exist on the ground, but are not shown on the OS base map. This makes any compliance monitoring very difficult as it unclear to both the agreement holder and the PO which features on the farm should be retained.
- Inappropriate legend. The key also varied between agreement maps and in some cases contained a symbol not found on the map.
- Not all cross-compliance features are mapped on agreement maps. The appraisal team felt that in order to monitor compliance consistently consideration should be given to extend this mapping to all cross compliance features. This would include the new elements suggested in sections 2.1 and 2.4 below.

Schedule 2 – The Management of Agreement Land

Schedule 2 provides full detail of the prescriptions and management which apply to land and boundary features covered by the agreement. It covers both the baseline management prescriptions (Schedule 2.1) and prescriptions for land management (2.2) access (2.3) cross-compliance on boundaries (2.4) and management of boundaries (2.5).

Over the whole Schedule strengths included:

- Appropriate variations – for example some Countryside around Town agreements where no grazing was allowed on grassland near to large settlements as interference with stock or vandalism may be an issue.

Weaknesses included:

- Lack of variations. A lack of variation usually resulted in standard prescriptions being used when a slight variation would be more effective. For example, the general grazing prescription suggests 10 weeks grazing in any one year. However, the timing of that grazing is likely to be environmentally critical in many cases.
- Inappropriate variations. In some cases, prescription variations were used, but were judged to be inappropriate to achieve the objectives set.
- Prescriptions not relating to objectives. In some cases prescriptions did not further any of the agreement's objectives.
- There was often no reference to management plans.
- Poor wording. Wording in the agreement is important in ensuring full understanding on the part of the agreement holder. For example, in one case the grazing of horses was identified from field survey and this may well have been a breach of compliance. However, the fault seemed to lie in the poor wording of the agreement. Others examples of poor wording covered the management of weed species such as bracken and Himalayan balsam where the agreement holder is likely to need clear instruction.
- Mistakes. Cases of the timings being incorrect or prescriptions being placed in the wrong section were found.

Strengths and weaknesses specific to some of the individual parts of the Schedule 2 are as follows:

2.1 Baseline Management Prescriptions (terms applicable to all land under schedule 2.2.1, 2.2.2, 2.2.3 etc.).

Schedule 2.1 specifies the prescriptions and management expectations for all land under agreement. The appraisal team concluded that there were a number of requirements in this section which could usefully be extended to the whole holding. These included:

- Field and hedgerow tree protection (from felling, mechanical damage and root disturbance).
- Prohibited or regulated use of metal detectors and the disturbance of sites of archaeological interest.
- Removal of any traditional boundary (all traditional boundaries should be marked for preservation on the agreement map).
- The requirement not to increase stocking rates on valuable habitats elsewhere on the holding or land under a similar management regime. The use of pesticides and herbicides to control aquatic plants and bankside vegetation.

2.3 Access

The intention of Schedule 2.3 is to detail the prescriptions relevant to new access provision under the agreement.

The strength of this schedule was that it contained in one place, prescriptions vital to good access.

Specific weaknesses included:

- Need for a greater level of detail on some agreements, and less reliance on supplementary guidance notes.
- Unjustified variations used. Prescriptions varied for no apparent reason. For example, two field boundary agreements had the prescription to "ensure a safe and even surface of at least 2 metres width..." for footpaths while one did not have this or an equivalent clause.

2.4 Cross Compliance - Boundaries (covering red, green and orange boundaries.)

Schedule 2.4 specifies the cross-compliance requirements common to all boundaries under agreement. In some but not all cases this represented all the boundaries on the holding. The appraisal team felt that cross compliance aspects of traditional boundaries should be extended to the whole holding, and these prescriptions located in a comprehensive cross compliance section as detailed in section 2.1 above.

2.5 Management Prescriptions - Red Boundaries.

Schedule 2.5 specifies the management prescriptions for boundaries to be managed under the agreement. The strengths of this schedule is that it details the management

prescriptions for traditional boundary restoration in a single place in a coherent and structured fashion.

Specific weaknesses included:

- Local variations. The use of standard prescriptions for boundary restoration was questioned in some cases. Local traditions in boundary restoration should be support by the Scheme.
- Species list. A number of topic reports raised the issue of the lack of, or the inappropriateness of, the species list for hedge planting. The standard prescription provides a species list (of about 20 species) from which a minimum of four is chosen, whilst ensuring that a single species does not comprise more than 75% of the hedge. This precludes local variations such as hawthorn only hedges. The species list is restrictive (not including tree species often found in a hedges such as beech, oak, or elm), while permitting, at the extreme, the planting of a hedge of 75% field rose.
- Relic walls. Relic walls, no longer acting as boundaries, are important historical features in their own right. Such boundaries should never be used as a source of stone for rebuilding elsewhere on the holding. Care should be taken in any rebuilding plans. Unless carried out sympathetically, the restoration of such boundaries should be discouraged, as these boundaries are often all that remain of previous land management practices and settlement patterns and are, in themselves, important historical landscape features.

Schedule 3 - Annual Payments

Schedule 3 provides a table detailing how much will be paid each year for each non capital management operation.

This was generally felt to be accurate and informative, although it not always clear from the table where each annual payment applied to on the holding because of a lack of clarity in the list and/or map. This could be improved.

Schedule 4 - Capital Works

Schedule 4 provides a table detailing the capital works to be undertaken, including year to be completed, a location code and how much will be paid.

Strengths included:

- This schedule usually provides the only detail in the agreement, other than the Map (Schedule 1) and field boundary work (Schedule 2.5), on the capital work to be undertaken.

Weaknesses included:

- Although guidance notes are provided on how to undertake particular tasks, a number of these items would benefit from more site specific detail. These included:

    Pond creation.

Tree planting. Detail should include species and subsequent aftercare management.

Capital special projects. Detail should include a general description, and requirements for specifications, quotes etc. If a management plan is not required for this project, a brief description of the rationale etc. should be included.

Schedule 5 - Supplementary Guidance Notes

Supplementary Guidance Notes provide additional guidance for specific activities which form part of the agreement. The Guidance Notes are not formally part of the agreement, and are rarely referenced within the agreement document. Good practice would be to reference the Guidance Notes in a contents page within the agreement.

Management plans

With regard to the inclusion of management plans within the agreement documentation, key weaknesses included:

- Often not referenced in the agreement.
- Agreement holder may be unaware of a management plan's existence.
- Need to develop templates for standard management plans
- Varying levels of quality

Good practice would be to reference the management plan in the agreement (and include perhaps as a new Schedule 6) so that both MAFF and the agreement holder are fully aware of the plan's availability and what is expected.

APPENDIX 7 - COUNTRYSIDE STEWARDSHIP AGREEMENT: DRAFT CONTENTS PAGE

1. The 'Agreement' (legal and administrative section, and Cross Compliance over the whole holding)
2. Agreement Objectives
3. Schedule 1 Map(s)
4. Schedule 2.1 Cross Compliance (covering the agreement land)
5. Schedule 2.2 Management of Specific Areas
6. Schedule 2.3 Access
7. Schedule 2.4 Cross Compliance on Field Boundaries on Whole Holding (perhaps incorporate with 2.1)
8. Schedule 2.5 Management of Specific Field Boundaries
9. Schedule 2.6 Details of Specific Capital Works (tree planting, pond creation)
10. Schedule 3 Annual Payments
11. Schedule 4 Capital Payments
12. Schedule 5 Supplementary Guidance Notes, as appropriate from the following:
    - Management plans
    - Game conservancy guidelines
    - Field boundaries: dry stone walls
    - Ponds, scrapes and water levels
    - Fencing
    - Hedgerow restoration
    - Bracken control
    - Scrub management
    - Tree planting
    - Access: open/linear
    - Access: educational
    - Water supply and water troughs
    - Grants for the repair of traditional buildings
    - Restoration plans for traditional buildings
13. Schedule 6 - Management Plan (if appropriate)

APPENDIX 8 - FULL LIST OF REPORTS PRODUCED AS PART OF THE MONITORING AND EVALUATION OF THE COUNTRYSIDE STEWARDSHIP SCHEME

Little, W., Short, C., Curry, N., Carey, P., and Finch, C. (1998) Monitoring and Evaluation of the Countryside Stewardship Scheme: Methodology Report. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Finch, C. (1998) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on Waterside Agreements. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Curry, N. and Short, C. (1998) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on Educational Access Agreements. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Carey, P. (1998) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on Upland Agreements. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Finch, C. (1998) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on Countryside Around Towns Agreements. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Short, C. (1999) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on Calcareous Grassland Agreements. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Carey, P. (1999) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on Lowland Heath Agreements. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Hunt, J and Finch, C. (1999) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on Historic Landscape Agreements. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Priscott, A. (1999) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on Coastal Agreements. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Carey, P. (2000) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on Arable margin Agreements. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Routh, C. (2000) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on Field boundary Agreements. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Morris, C. (2000) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on Old meadow and pasture Agreements. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Hunt, J. (2000) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on Orchard Agreements. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Finch, C. (2000) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on Special Projects. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Finch, C. and Blythe, C. (2000) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on Management Plans. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Morris, C. and Short, C. (2000) Monitoring and Evaluation of the Countryside Stewardship Scheme: Topic Report on the Scoring System. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.

Barnett, C.L. Carey, P.D. Firbank, L.G. Garbutt, R.A. Greenslade, P.D. Howard, D.C. Manchester, S.J. Myhill, D. Robinson, J. Scott, R. J. Smart, S. M. Walker, K. J. and Warman, E.A. (2000) Monitoring and Evaluation of the Countryside Stewardship Scheme: The ecological characterisation of land under agreement. Report by ADAS, CCRU and CEH to Ministry of Agriculture, Fisheries and Food. MAFF: London.