

**NORTH WEST COAST  
DISCOVERY TRAIL :  
IMPLEMENTATION FRAMEWORK**

*Consultative Report*



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Commissioned by -  
**NORTH WEST REGIONAL ASSEMBLY**  
on behalf of  
**North West Coastal Forum**

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# **NORTH WEST COAST DISCOVERY TRAIL - IMPLEMENTATION FRAMEWORK**

## **EXECUTIVE SUMMARY**

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### **The Implementation Framework**

The Implementation Framework is intended to guide and assist partner organisations in progressing the proposed Coastal Trail from the concept stage to the development stage. It recommends preliminary investigations and strategies, sets out an initial 5-year Project Management Programme and longer-term Implementation Programme and recommends organisational arrangements for the development, management and marketing of the Trail.

### **Considerations from the Feasibility Study and Development of Other Trails**

Following a summary of the findings of the *North West Coast Discovery Trail - Concept Feasibility Study* and confirmation of the support of many potential partner organisations for the Trail concept, the report highlights lessons from other trails and cycle routes, including -

- a. Key considerations in respect of Trail planning and development -
  - need for realism, in respect of timescales for Trail development
  - a Trail development strategy and action plan is required from the outset
  - sustainable approaches should be adopted to Trail construction and management
  - high standards for Trail development, maintenance, amenities and services should be agreed at an early stage
  - wherever feasible, the Coastal Trail should be accessible and comply with the Disabilities Discrimination legislation
  - the support of communities, user groups, landowners and tourism businesses should be sought from the outset.
- b. Important considerations relating to trail management arrangements include -
  - need for early commitments from partner organisations - e.g. a partnership agreement
  - a partnership management structure should be established at the earliest opportunity
  - a small Coastal Trail Coordination Unit, comprising a Coastal Trail Officer and support staff, should be employed to lead Trail development and coordinate funding, work on the ground, etc.
  - strong links are required with tourism marketing and development bodies.
- c. Funding considerations include -
  - need for realism in respect of funding requirements - for example, over £20m has been invested in developing and marketing the Trans Pennine Trail
  - major strategic funding support (e.g. HLF, Countryside Agency, Millennium Commission funding) has been crucial to recent trail development initiatives
  - requirements for longer-term commitments to staff and maintenance expenditures
  - early appraisal of potential economic impacts of trail use can demonstrate a trail's potential contribution to regional and local economies and support funding bids.

### **Preliminary Investigations and Strategies**

The Implementation Framework identifies a need for early action to progress preliminary investigations and strategies, which will -

- a. provide baseline datasets - e.g. condition of existing sections of Trail, user characteristics
- b. identify strengths, weaknesses, gaps and opportunities relating to specific aspects of the Trail - e.g. shortfalls in surface conditions or signing, gaps in accommodation provision
- c. set out an action programme for Trail development, improvements, services, etc.
- d. identify funding requirements, potential funders and a programme to secure funding
- e. assess potential user market and economic impacts of the Trail and related programmes.

The following **preliminary investigations and strategies** are recommended and the report outlines the purpose, key considerations, main tasks, indicative costs, timescales and skills requirements for each -

1. Trail survey and infrastructure development strategy
2. River and estuary crossings options assessment
3. Asset management strategy and trail management system
4. Funding strategy
5. Business plan for the proposed Coastal Trail Partnership
6. Baseline use/user survey and monitoring programme
7. Market and economic impact assessment
8. Marketing strategy
9. Community inclusion and involvement strategy
10. Communications strategy
11. Web site development and maintenance
12. Interpretation and education strategy
13. Trail user services audit and development programme
14. Public transport audit and 'green travel' strategy
15. Trail design and visitor management demonstration projects.

### **Recommendations for Project Management and Implementation Programmes**

The importance of the effective and timely completion of the preliminary investigations and strategies is emphasised and a **Project Management Programme** is recommended, which illustrates the inter-linkages and inter-dependencies between these and shows how they may be progressed over an initial 5-year period. A longer-term (10+ year) **Implementation Programme** illustrates how the various investigations and strategies will lead into the development of the Trail infrastructure and delivery of other Trail-related programmes.

It is recommended that the Project Management Programme should cover the period 2005/6 to 2009/10, enabling the completion and official launch of first stages of the Trail (e.g. Chester to Southport, Lytham to Morecambe and St. Bees/Coast-to-Coast Path to Carlisle/Hadrian's Wall Path sections) and an initial Website by 2010. The spread of the initial investigations and strategies over the first 5-year period starting in 2005/6 is dependent on substantive funding being available by 2005/6, and recognises that several strategies are dependent on information from preceding assessments and that there will be significant project management tasks associated with the investigations and strategies, but a limited project management capabilities.

Indicative costs of the preliminary investigations and strategies within the Project Management Programme are £0.53-0.63m (excluding implementation, staff costs and VAT). These estimates must be seen in the context of -

- a. the Trail providing a major new regional and national recreational, tourism, environmental and community asset and delivering a range of public policy objectives
- b. potential for the Trail to attract significant new visits and generate major day visitors' and tourists' expenditures and associated income and employment (e.g. users of Pembrokeshire Coast Path spent £14m/year and supported 567 jobs in 1996/7)
- c. potential to spread the costs amongst a range of partner organisations; several of which are committed to, or considering, major investments in sections of the proposed Trail or in related projects (e.g. Mersey Waterfront Way, Ribble Regional Park, Cumbria's Coastal Beacon Projects, potential southwards extension of the Hadrian's Wall Path National Trail)
- d. requirements for sound planning of the multi-£m investment, which will be required over the next 10 years to develop, manage and market a top-class, multi-use Coastal Trail.

Key challenges for the partner organisations will include -

- ensuring that costs are shared amongst the local authorities and other organisations
- securing strategic funding support
- making an early start to Trail programmes - including, to take advantage of funding sources, which may only be available for a restricted period (e.g. rural recovery funding).

Completion of the Implementation Programme within the recommended 10-year period should enable **completion and launch of the Coastal Trail by 2015**, subject to adequate funding being available for the preliminary investigations, strategies and infrastructure works from 2005/6 onwards.

An outline risk assessment is provided, which identifies potential funding shortfalls and time delays as posing the greatest threats to effective progress on the Trail programmes. Funding and timely progress on the following programmes will be critical to the overall Trail development programme -

Programme 1. Trail survey and infrastructure development strategy

Programme 4. Funding strategy

Programme 5. Business plan for the proposed Coastal Trail Partnership.

Effective progress will be required on the other recommended programmes; especially, -

Programme 2. River and estuary crossings options assessments

Programme 3. Asset management strategy and trail management system

Programme 7. Market and economic impact assessment

Programme 8. Marketing strategy.

### **Recommendations for Organisational Arrangements to Progress the Trail**

Prior to recommending an organisational structure to 'drive', advise and assist the development, management and marketing of the Coastal Trail, the report indicates potential partner organisations and identifies -

- a. strengths or opportunities relating to organisations currently associated with the Trail -
  - enthusiasm and support of several key individuals and organisations
  - local knowledge and expertise in public rights of way, cycleways and related aspects of trail development amongst staff of the local authorities, AONB units, Sustrans, etc.
  - existing strategic paths and cycle routes, which will comprise sections of the Trail
  - partner organisations' supportive strategies and programmes
  - range of potential funding sources - e.g. local transport plan, rural recovery funds
  - potential for voluntary support, such as voluntary rangers.
- b. apparent weaknesses and/or potential threats -
  - lack of a dedicated lead body with appropriate corporate and staff capabilities
  - varying levels of commitment and support from partner organisations
  - uncertainties and potential delays, which may arise from the reorganisation of tourism functions and local government in the North West
  - potential delays in securing funding and progress on the Trail and problems of sustaining investment, especially for Trail maintenance
  - problems of maintaining the impetus, interest and support of 'key players' and potential issues arising from agency arrangements for local authority functions (e.g. out-sourcing of rights of way services in Cumbria)
  - variations in standards of route and associated services.

Having considered organisational requirements for the effective development, management and marketing of the proposed Coastal Trail, including optional organisational formats (e.g. joint committee, partnership, company structures), the consultants recommend that -

1. **the partner organisations should establish a North West Coastal Trail Partnership** - through a formal partnership agreement, which sets out the basis for joint working to develop, manage and market the proposed North West Coast Discovery Trail
2. **scope should be provided, within the partnership agreement, for the establishment of a North West Coastal Trail Company** - as a subsidiary, not-for-profit company to employ the proposed Trail staff and deliver Trail-related projects and programmes, where the fiscal and legal benefits of a company limited by guarantee may be advantageous
3. **the proposed Partnership should review its status after the first three years of its operation** - with a view to considering whether company status may prove advantageous
4. **the Partnership should seek charitable status** - as a means of attracting financial and practical support (e.g. volunteering)
5. **along with coordinated, Trail-wide approaches to the development, management and marketing of the Trail, the Trail should be divided into 2 sections for operational purposes** - South: Chester to mid-Lancashire; North: mid-Lancashire to Carlisle
6. **a small Coastal Trail Development Group should be established** - comprising senior staff of key partner authorities and funding agencies and a representative of each Area Coordination Group, to provide technical advice and support to the Trail Partnership and staff and to guide and oversee operational aspects of Trail development, management, marketing and associated programmes
7. **more widely representative Area Coordination Groups (South; North) should be established** - to advise and support the Trail Officer and Trail Coordinators and ensure partnership cooperation and funding and progress on Trail programmes
8. **a Coastal Trail Coordination Unit should be established, comprising a Coastal Trail Officer, Trail Coordinators (South, North), a Funding and Marketing Officer and an Administrative Assistant** - to support the Partnership and 'drive' Trail development, management, marketing and associated programmes
9. **a Coastal Trail Consultative Forum(s) should be established** - as a means whereby interest groups can be consulted and can provide information, advice and suggestions on Trail development and related matters. This Forum (or area forums) may meet once or twice a year
10. **the Trail Partnership should encourage and support the formation of an independent North West Coastal Trail Friends Group** - to mobilise supporters of the Trail and encourage their involvement in its development, management and marketing.

Costs of running the proposed Partnership and Trail Coordination Unit are estimated at £190-207k/year. Initial establishment costs may amount to some £52-66k. These costs may be substantially reduced if partner organisations provide staff on a secondment, or similar, basis and/or provide support services and equipment as contributions in kind. Again, these costs should be considered against the potential benefits, which may be derived from the development of the North West Coast Discovery Trail and the associated social, environmental, recreational and tourism development programmes.



## **NORTH WEST COAST DISCOVERY TRAIL - IMPLEMENTATION FRAMEWORK**

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### **1. INTRODUCTION**

#### **1.1 The Implementation Framework**

1.1.1 This Implementation Framework for the proposed North West Coast Discovery Trail is intended to guide and assist partner organisations in progressing the Coastal Trail from the concept stage to the development stage and it recommends an organisational framework for the implementation, management and marketing of the Trail. Preparation of this report was commissioned by the North West Regional Assembly, on behalf of the North West Coastal Forum and its partner organisations.

1.1.2 Following this brief **Introduction** (section 1), the report sets out -

- a brief **summary of the findings of the *Concept Feasibility Study*<sup>1</sup> and key lessons from the development of other trails** (section 2)
- **recommendations for initial investigations and strategies** - to support the development, management and marketing of the proposed Trail (section 3)
- **outline project management and implementation programmes** - illustrating how the initial investigations and strategies, and subsequent Trail development and associated programmes, may be progressed (section 4)
- **recommendations for a management structure** - to ensure effective Trail development and management (section 5).

In addition, key stages in developing the Hadrian's Wall Path National Trail and the Trans Pennine Trail and 'lessons' of relevance to the North West Coastal Trail are outlined in Appendices A and B.

#### **1.2 Consultative Status of Report**

1.2.1 A range of organisations have expressed support, in principle, for the Coastal Trail concept. This Consultative Report is intended to stimulate discussion on how the development of the Trail may be progressed and to encourage further partnership-building and commitments to funding and progressing the preliminary investigations and strategies and establishing an organisational structure to take forward the development of the Trail. While of particular relevance to organisations with potential implementation, management and funding roles - especially, the local authorities, North West Regional Assembly and North West Development Agency - this Report will be of interest to other organisations, which have expressed support for the Trail and may assist its development, including Sustrans, Groundwork Trusts, AONB management units and voluntary recreational and environmental organisations.

#### **1.3 Acknowledgements**

1.3.1 Many potential partner organisations were consulted during the preparation of this report (Appendix C) and several other organisations provided inputs during the *Concept Feasibility Study*. The consultants and clients are grateful to all the individuals and organisations, who provided information and advice on which this report is based. In particular, the support and guidance of the interim Coastal Trail Steering Group is acknowledged with gratitude.

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<sup>1</sup> *North West Coastal Trail - Concept Feasibility Study*, Report to North West Coastal Forum, Peter Scott Planning Services Ltd., 2003



## 2. FINDINGS OF THE CONCEPT FEASIBILITY STUDY AND LESSONS FROM THE DEVELOPMENT OF OTHER TRAILS

### 2.1 *Concept Feasibility Study - Summary of Findings*

2.1.1 The *North West Coastal Trail - Concept Feasibility Study* demonstrated that -

- i. there is substantial scope for developing and promoting a continuous **North West Coast Discovery Trail** - from Chester, the Wirral and Merseyside, to Carlisle and the Solway
- ii. the proposed Trail can -
  - a. build on, and enhance, existing paths and cycle routes along the coast, link coastal settlements, and cater for a variety of walking, cycling and, to a lesser extent, riding markets
  - b. enable and encourage exploration, appreciation and enjoyment of the coastal landscapes, settlements, natural and cultural heritage and visitor attractions - by residents, day visitors and tourists
  - c. bring a wide range of benefits to the North West, by contributing to leisure, tourism and economic growth, urban and rural regeneration, and community health and well-being - all in sustainable ways.

2.1.2 In particular, the feasibility assessments indicate that -

- a. the concept of a multi-user Coastal Trail from Chester to Carlisle is ambitious - but can contribute to a range of public policy agendas
- b. the landscapes, topography and natural, cultural and built heritage of the North West's coast and coastal settlements are major strengths of the Trail; however, it will pass through major urban areas and some poorer quality environments
- c. parts of the Trail will differ markedly from other coastal paths and are likely to appeal to different users than traditional long-distance walkers
- d. it is essential that the Trail is marketed honestly and realistically - stressing its positive attributes (e.g. landscapes, birdlife, heritage, visitor attractions) and opportunities to discover and enjoy the North West's coast, settlements and heritage, rather than promoting it as an end-to-end walking or cycling route
- e. there is scope to adopt a 'green corridor' approach to enhancing the Trail corridor
- f. existing paths and cycle routes (e.g. Wirral Way, Cumbria and Lancashire Coastal Ways, National Cycle Network routes), information and other services provide a framework from which the Coastal Trail may be developed
- g. links to national and regional routes (e.g. Hadrian's Wall Path, C2C Cycle Route, Trans Pennine Trail) can enable longer-distance and circular trips and local path and cycleway networks can enable local exploration
- h. gaps in the continuity of existing paths and cycle routes, long detours around estuaries and shortfalls in the quality of path surfaces, visitor services, etc., require to be tackled before the Trail is widely promoted
- i. there are few safe, off-road riding routes along much of the proposed Trail
- j. train, bus and some tram services can enable users to travel to/from the Trail and give users the choice of avoiding walking or cycling through urban areas and commercial resorts and taking long detours around estuaries
- k. there is strong demand for coastal visits, including for walking and cycling, and such visitors contribute significantly to local economies
- l. market segments with strong growth potential include recreational and holiday walking and cycling trips, group walking, cycling and educational visits, and events
- m. sections of the Trail can cater for less mobile and disabled users and there is scope for links from, and to promote use by, disadvantaged communities.

## 2.2 Support for the Findings of the *Concept Feasibility Study*

2.2.1 The findings of the *Concept Feasibility Study* were presented at the North West Coastal Trail Concept Launch at Southport in October 2003. The launch was attended by representatives of a wide range of public, private and voluntary organisations - many of whom signed up to a statement of ... *support, in principle, for the proposals for a North West Coastal Trail as a major recreational asset for the North West Region.* Participants welcomed the Trail proposals and made positive and constructive comments on the findings and recommendations of the *Concept Feasibility Study*.

## 2.3 Lessons and Recommendations from Other Trail and Cycleway Projects

2.3.1 Reviews of the experiences of developing and managing the Hadrian's Wall Path National Trail (Appendix A) and Trans Pennine Trail (Appendix B) and other research and experience of other longer-distance path, cycleway and multi-use route projects have enabled the consultants to identify a number of key lessons and recommendations for the establishment and management of the proposed North West Coastal Trail -

### a. Key Trail planning considerations include -

- **need for realism in respect of the timescale for Trail development** - considerable time is required to undertake preliminary investigations and planning, to prepare, submit and progress funding bids, to obtain necessary consents and agreements (e.g. planning consents, access agreements, rights of way negotiations) and to get practical work underway. For example, the Hadrian's Wall Path was mooted in 1976, the main development phase started in 1994 and the Path was opened in 2003, and the Trans Pennine Trail was agreed in principle in 1986 and opened in 2001
- **a Trail development strategy and action plan is required from the outset** - this will support funding bids and provide a basis for seeking partner organisations' involvement and support. It should be well researched and show the costs of Trail development and associated programmes and set a clear plan of action for Trail development and marketing, which partner organisations can sign up to
- **sustainable approaches should be adopted to Trail construction and management** - it is usually easier to gain capital funding, than revenue funding. Hence, initial investment in 'long-life' infrastructure and on-going asset management approaches to trail management/maintenance will be essential
- **high standards for Trail development, maintenance, amenities and services** (e.g. information, accommodation) **should be set out at an early stage** - especially as the proposed Trail will be competing with other well-established trails for visitors. The Countryside Commissions' booklet *Meeting the Grade - Quality Standards for National Trails* exemplifies the types of standards the proposed Trail should satisfy
- **wherever feasible, the Coastal Trail should be accessible and it should comply with the Disabilities Discrimination legislation**
- **the support of local communities, user groups and, especially, landowners and activity tourism businesses, should be sought from the outset** - to ensure that Trail proposals are consistent with their needs and aspirations and that they understand the potential benefits, which may be derived from the Trail

**b. Important considerations in respect of trail management arrangements are -**

- **the need for early commitments from key partner organisations** - this may be in the form of a partnership agreement, which sets out each of the principal partner organisations' roles and responsibilities
- **a partnership management structure should be established at the earliest opportunity** - preferably, the management body should have corporate powers (e.g. not-for-profit company) to enable it to hold and expend funds and employ contractors, etc.. A less formal partnership structure may be constrained to progressing the development of the Trail at the pace of its slowest and least committed members. A lead body will be required to service the partnership and employ its staff, etc.
- **a Trail Officer (or similar) should be employed at an early stage to lead Trail development and coordinate funding, work on the ground, etc.** - he/she will require legal, technical and administrative support from partner organisations, and a small staff team to enable progress on trail development and associated programmes
- **strong links are required with tourism organisations - especially tourism marketing and development bodies** - to ensure that visitor services meet users' needs and aspirations, to fill any gaps in services (e.g. walker-friendly accommodation, cycle hire outlets) and ensure that marketing programmes relating to the Trail are consistent and mutually supportive

**c. Funding considerations include -**

- **need for realism in respect of funding requirements** - Hadrian's Wall Path (walking route) has cost over £6m in infrastructure works and preliminary marketing and a further £3.7m is being spent by the Hadrian's Wall Tourism Partnership on tourism marketing and business development, visitor information and associated programmes relating to Hadrian's Wall and Wall Path. Over £20m has been spent on developing and marketing the Trans Pennine Trail (multi-use route)
- **major strategic funding support has been crucial to recent trail development initiatives** - development of Hadrian's Wall Path has been reliant on Heritage Lottery Fund and Countryside Agency support and the Trans Pennine Trail benefited from substantial Millennium Commission funding. EU, government, development agency, Lottery or other strategic funding support will be essential for the development of the proposed Coastal Trail
- **requirements for longer-term staff and maintenance funding commitments** - partner organisations need to recognise, and budget for, long-term staffing, maintenance and marketing commitments. In 2000/01, 8 national trails in England and Wales had annual running costs of around £450/km (excluding the South West Coast Path which had exceptional coastal erosion and improvement costs in 2000/01)
- **early appraisal of the potential economic impacts of the Coastal Trail will demonstrate the Trail's potential to contribute to the regional and local economies of the North West** - such information will help to 'sell' the Trail concept and its development to partner organisations and strategic funders.

2.3.2 Additional findings and lessons from the case studies are presented in Appendices A and B.



### 3. RECOMMENDATIONS FOR INITIAL INVESTIGATIONS AND STRATEGIES

#### 3.1 Initial Surveys, Assessments and Strategies

3.1.1 The previous section shows the breadth of the Trail concept and the range of potential benefits that it can bring to the regional and local communities, environments and economies of the North West. It is vital that the Trail is planned and 'built' on a strong foundation of preliminary surveys, assessments and strategies, to enable it to achieve these benefits, ensure that Trail development and associated programmes progress efficiently and in an integrated way, and that major investment requirements are forthcoming and applied effectively. This section provides outline summaries for preliminary investigations and strategies to 'kick-start' the Trail development process.

3.1.2 The proposed preliminary work will play several important roles, including -

- a. **providing baseline datasets** - including information on the condition of existing Trail sections, levels of use of such sections and users' characteristics and expenditures, and current visitor and public transport services. These baseline datasets will assist forward planning, target setting and monitoring
- b. **identifying strengths, weaknesses, gaps and opportunities relating to specific aspects of the Trail** - such as shortfalls in Trail surfaces, signage and continuity, user information, accommodation and transport services, and opportunities to overcome these issues
- c. **setting out an agenda and a detailed programme for action** - including programmes for Trail development and improvements, marketing, encouraging the growth of Trail-related businesses (e.g. walking holiday providers, cycle hirers), and promoting use of, and involvement in, the Trail by people from less advantaged communities
- d. **identifying investment requirements, potential funding sources and a programme to secure funding**
- e. **assessing the impacts of the Trail and related programmes** on, for example, local and regional visitor markets and users' expenditures. Such data can demonstrate the value of the Trail and support strategic and other funding bids.

3.1.3 The recommended preliminary investigations and strategies comprise (in no order of priority) -

1. **Trail survey and infrastructure development strategy**
2. **River and estuary crossings options assessment**
3. **Asset management strategy and Trail Management System**
4. **Funding strategy**
5. **Business plan for the proposed Coastal Trail Management Partnership.**
6. **Baseline use/user survey and monitoring programme**
7. **Market and economic impact assessment**
8. **Marketing strategy**
9. **Community inclusion and involvement strategy**
10. **Communications strategy**
11. **Web site development and maintenance**
12. **Interpretation and education strategy**
13. **Trail user services audit and development programme**
14. **Public transport audit and 'green travel' strategy**
15. **Trail design and visitor management demonstration projects.**

Outline recommendations for these investigations or strategies are set out below.

<b>1. TRAIL SURVEY AND INFRASTRUCTURE DEVELOPMENT STRATEGY</b>	
<b>Purpose</b>	<p>a. <b>To agree standards for Trail development and associated infrastructure</b> (e.g. surfaces, signing, cycle parking)</p> <p>b. <b>To undertake a standard baseline survey of the routing, condition and infrastructure provision along the entire length of the Trail and identify gaps, shortfalls in condition, safety issues, etc.</b></p> <p>c. <b>To prepare preliminary recommendations for Trail development</b> (e.g. section of new route to avoid hazardous roads, upgrade section for multi-use) <b>and consult with local authorities, user groups, etc. on these</b></p> <p>d. <b>To assess requirements for Trail construction, improvement, other works and associated infrastructure.</b></p> <p>e. <b>To prepare an action plan for Trail development and associated works, including identification of responsibilities, indicative costs and timing.</b></p>
<b>Key Considerations</b>	<p>The survey and strategy will identify the nature and extent of works and indicative costs to achieve a continuous, multi-use Trail to agreed standards. It will <u>not</u> provide design details for Trail construction, improvements or other infrastructure.</p> <p>Standards for Trail development (e.g. widths, gradients, surface conditions, safety) and associated infrastructure (e.g. signs, bridges, seats, shelters, car parks) will vary in relation to types of users (e.g. inexperienced short distance walker/cyclist, long distance walker, mountain biker, horse rider, disabled user; single or multi-use sections) and locations (e.g. urban, semi-urban or remoter rural area). TMS or similar software (see Programme 3) will enable the logging, storage and retrieval of survey data against a GIS base, using GPS technology and digital photography. These data can be used for asset management purposes.</p> <p>The Trail may be split into 3 sections for survey, action plan, contractual and funding purposes: Cheshire, Flintshire &amp; Mersey Waterfront; Lancashire; Cumbria.</p>
<b>Main Tasks</b>	<p>a. <b>Identify and agree standards</b></p> <ul style="list-style-type: none"> <li>▪ identify criteria and standards for Trail provision, maintenance and associated infrastructure and amenities</li> <li>▪ consult and seek consensus on proposed criteria and standards</li> </ul> <p>b. <b>Baseline route and condition survey</b></p> <ul style="list-style-type: none"> <li>▪ undertake survey on foot/cycle and record data on route alignments, condition, drainage, hazards, signing and other infrastructure</li> <li>▪ identify key issues and opportunities for route realignment, development, etc. [survey should use TMS data management software or similar - Programme 3]</li> </ul> <p>c. <b>Preliminary recommendations for Trail development, improvements, etc.</b></p> <ul style="list-style-type: none"> <li>▪ prepare initial recommendations (including options, as appropriate) for new sections and improvements to existing Trail sections, etc.</li> <li>▪ consult l.a.s, user groups and other interested parties on recommendations</li> </ul> <p>d. <b>Assess requirements for infrastructure development, improvements, etc</b></p> <ul style="list-style-type: none"> <li>▪ undertake engineering surveys and assessments to assess type of works required and indicative costs</li> </ul> <p>e. <b>Prepare Trail development action plan</b></p> <ul style="list-style-type: none"> <li>▪ prepare costed and scheduled action plan (e.g. 5-year programme) for works identified from assessments and identify responsibilities for progressing works</li> </ul>
<b>Indicative Costs &amp; Timescales</b>	<p>£104-127k (basis for cost estimates supplied to NWRA)</p> <p>12-15 months</p>
<b>Skills Required &amp; Likely Source</b>	<p>Civil engineering. Trail design and management.</p> <p>Civil engineering or pathwork/cycleway consultants.</p> <p>Local authority staff. Sustrans (contract basis). Groundwork (contract basis).</p>
<b>Existing Strategies, Surveys, etc.</b>	<p>Proposed surveys for routes of Mersey Waterfront Way and on Sefton Coast.</p>
<b>Source of Estimates</b>	<p>Burgess Roughton, Consulting Engineers (01539 722204)</p>



<b>2. RIVER AND ESTUARY CROSSINGS OPTIONS ASSESSMENT</b>	
<b>Purpose</b>	<b>To identify and assess the principal engineering and other options (e.g. public transport services) for major river and estuary crossings - including the desirability, feasibility and indicative costs of preferred options.</b>
<b>Key Considerations</b>	<p>Several rivers and estuaries require lengthy detours by walkers, cyclists and other users. Safe and direct crossings would enhance the experience of many users, increase the market potential of the Trail and enhance the tourism economies of neighbouring settlements. However, for some, the detours can be attractive for their scenery and wildlife.</p> <p>Options vary, but may include 'hanging' pedestrian/cycle bridges off railway bridges, creating a path along embankments, constructing bridges, adapting utilities structures, or promoting train/bus services and ensuring these can transport cycles. Key crossings to be assessed include - R. Irt &amp; R. Esk (Ravenglass), R. Duddon, Cartmel Estuary, Kent Estuary, R. Wyre and R. Douglas.</p>
<b>Main Tasks</b>	<p><b>a. Initial scoping study and consultations</b></p> <ul style="list-style-type: none"> <li>▪ initial identification of options for main crossings</li> <li>▪ consulting owners of structures and access points, local authorities, etc.</li> <li>▪ preliminary assessment of desirability, potential feasibility and scale of costs</li> <li>▪ community and other consultations</li> <li>▪ selection of preferred option(s) for further evaluation</li> </ul> <p><b>b. Engineering and related assessments and recommendations</b></p> <ul style="list-style-type: none"> <li>▪ engineering surveys and assessments of feasibility</li> <li>▪ preliminary design and costs studies for selected option(s)</li> <li>▪ presentation of findings and recommendations</li> </ul>
<b>Indicative Costs &amp; Timescales</b>	£100-122k (basis for cost estimates supplied to NWRA) 9-12 months
<b>Skills Required &amp; Likely Source</b>	Civil engineering. Civil engineering consultants (possibly with support from local authority engineers)
<b>Existing Strategies, Surveys, etc.</b>	Current study of R. Weaver crossing for cyclists.
<b>Source of Estimates</b>	Burgess Roughton, Consulting Engineers (01539 722204)

<b>3. ASSET MANAGEMENT STRATEGY AND TRAIL MANAGEMENT SYSTEM</b>	
<b>Purpose</b>	<p><b>Asset Management Strategy :</b></p> <ul style="list-style-type: none"> <li>▪ to establish explicit, efficient and cost-effective approaches to the maintenance of Trail resources - e.g. surfaces, bridges, signs, amenities, based on whole life costs.</li> </ul> <p><b>Trail Management System :</b></p> <ul style="list-style-type: none"> <li>▪ to commission, adopt and operate Trail Management System (or similar specialist GIS-linked data management software) to facilitate text and GIS map-based data recording, storage, handling, analysis and reporting on, for example - Trail condition surveys, maintenance work, legal events, enquiries/complaints and related activity and information.</li> </ul>
<b>Key Considerations</b>	<p><b>Asset Management</b> - local authorities and other public bodies are legally obliged to maintain most assets under their control and to satisfy Health and Safety and duty of care obligations. Systematic asset management approaches can ensure the best use of scarce labour, plant and financial resources, through timely intervention to prevent major deterioration or failures in surfaces, bridges, etc.. The Trail Survey and Infrastructure Development Strategy (see Programme 1) will provide a basis from which the Asset Management Strategy can be developed.</p> <p><b>Trail Management System</b> - this is a version of Countryside Access Management System (CAMS) developed by exeGesIS SDM Ltd. and adopted by many rights of way authorities and trail managers. TMS provides asset management capabilities and tools for day-to-day trail management. Data capture uses PDAs (personal digital assistants) with GPS capabilities to enable the recording of Trail assets, their condition, maintenance requirements, etc.. TMS can enable the electronic transfer of text and map data between partners and has options for web mapping and trail promotion through web modules. (see information at <a href="http://www.esdm.co.uk">www.esdm.co.uk</a>)</p>
<b>Main Tasks</b>	<p><b>a. Prepare asset management strategy :</b></p> <ul style="list-style-type: none"> <li>▪ establish standards, responsibilities and protocols for Trail surveys, maintenance, etc., recognising potential responsibilities and roles of various organisations with Trail interests</li> <li>▪ establish common approaches to Trail condition surveys, risk assessments, reporting, etc. (e.g. using TMS)*</li> <li>▪ estimate maintenance costs, identify potential funding sources, etc.</li> <li>▪ develop, consult on and agree asset management strategy amongst key partners</li> </ul> <p>[Estimates of maintenance costs will require data from Programmes 1 and 2]</p> <p><b>b. Install and operate Trail Management System</b> (data management software):</p> <ul style="list-style-type: none"> <li>▪ identify requirements - e.g. central TMS installation operated by Trail Officer, TMS installed in each authority, or central TMS with Internet link from each authority - and seek tenders for TMS or similar system</li> <li>▪ commission system - adapt system to suit requirements and existing data handling systems. Train operators</li> <li>▪ record information on system - e.g. route (in links), location, description and condition of surfaces, infrastructure, amenities and facilities, landowner data, legal events, maintenance requirements/works, use data, etc..</li> <li>▪ operate and maintain system as asset management and data handling tool.</li> </ul>
<b>Indicative Costs &amp; Timescales</b>	<p>Asset Management Strategy : £12-15k or Trail Officer/Coordinator.* 3-4 months</p> <p>Trail Management System : £20-22k (central TMS with remote browser access over Web, customisation and training for partner authorities). 4-6 months</p>
<b>Skills Required &amp; Likely Source</b>	<p>Asset management expertise: civil engineers - consultants or local authority staff.</p> <p>Trail Management System (or similar): Specialist IT and data management consultants</p>
<b>Sources of Estimates</b>	<p>TMS: exeGesIS SDM Ltd. (<a href="http://www.esdm.co.uk">www.esdm.co.uk</a>, 01874 711145)</p>

<b>4. FUNDING STRATEGY</b>	
<b>Purpose</b>	<p><b>To identify strategic and other funding opportunities to support development of the Trail and associated facilities, services and programmes - including marketing, Trail-related business development, 'greening' and social inclusion programmes.</b></p> <p><b>To agree packages and partnerships for funding bids and develop and progress bids.</b></p>
<b>Key Considerations</b>	<p>Development and marketing of the Trail will require multi-£m investment and create a major regional asset. A range of strategic capital funding sources (e.g. SRB, EU, Lottery) and other funding opportunities (e.g. LTP programmes, local grant making bodies) may be available. The Regional Rural Recovery Plan (including funding through ERDP, EU Obj. 2 &amp; 3, Leader+ and Market Towns Initiatives) and County Rural Recovery Action Plans may provide funding to support Trail-related programmes.</p> <p>A key role of a skilled Funding Officer/Adviser (possibly employed on a short-term contract - e.g. 3 years) will be to source major external funding support.</p>
<b>Main Tasks</b>	<ol style="list-style-type: none"> <li><b>a. Identify potential funding sources and discuss potential support and criteria with representatives of these sources</b></li> <li><b>b. Identify funding bid packages, form partnerships and agree match funding support from Trail partner organisations - e.g. I.a.s, NWDA, NWRA</b></li> <li><b>c. Prepare coordinated programme for funding submissions</b></li> <li><b>d. Prepare and submit bid documentation</b> - including making presentations and monitor progress of bids: directly, or through partner organisations.</li> </ol>
<b>Indicative Costs &amp; Timescales</b>	<p>£12-15k, if strategy is developed by consultant. 4-6 months.</p> <p>Salary costs if Funding Officer employed by Trail Partnership (see Section 5).</p>
<b>Skills Required &amp; Likely Source</b>	<p>Funding procurement. Financial and project management for environmental, recreational and/or tourism projects.</p> <p>Funding Officer employed by Partnership</p>
<b>Existing Strategies, Surveys, etc.</b>	<p>None of direct relevance</p>

<b>5. BUSINESS PLAN FOR PROPOSED COASTAL TRAIL MANAGEMENT PARTNERSHIP</b>	
<p><b>Purpose</b></p> <p><b>Key Considerations</b></p>	<p><b>To provide an effective framework for the establishment, operation, funding and accountability of the proposed Coastal Trail Management Partnership and Coordination Unit (see s. 5).</b></p> <p>This Implementation Framework has outlined options and recommendations for a Coastal Trail Management Partnership and Coordination Unit. A business plan will be required to provide a more detailed framework for the establishment, organisation, operation, staffing, accommodation, funding and financial management, and reporting and accountability of the Partnership and to set out an action plan for its work over the next 3 to 5 years.</p>
<p><b>Main Tasks</b></p>	<p><b>a. Secure partners' agreement to Partnership format and funding</b></p> <ul style="list-style-type: none"> <li>▪ lead body/Steering Group will require to secure the key partner organisations' agreement and commitments to establishing and funding the Partnership.</li> </ul> <p><b>b. Business plan development</b></p> <ul style="list-style-type: none"> <li>▪ set out mission, aims, scope, key activities and status of Partnership</li> <li>▪ establish Partnership structure, membership and members' responsibilities and roles</li> <li>▪ set out staffing and staff capabilities, responsibilities and roles, and roles of contractors, volunteers, etc.</li> <li>▪ identify accommodation and other requirements (e.g. vehicles, equipment)</li> <li>▪ outline Health and Safety responsibilities and public liability issues</li> <li>▪ set out costs, funding requirements and sources of funding</li> <li>▪ outline performance and financial monitoring arrangements</li> <li>▪ establish arrangements for reporting to partners and wider interests</li> <li>▪ provide framework for Consultative Forum and Friends' Group(s)</li> <li>▪ set out 3-5 year action programme.</li> </ul> <p><b>c. Agree business plan with key partners</b></p>
<p><b>Indicative Costs &amp; Timescales</b></p>	<p>Costs: £12-14k; or to be developed by Coastal Trail Officer. 3-4 months</p>
<p><b>Skills Required &amp; Likely Source</b></p>	<p>Business planning for countryside, environmental or other partnership organisation. Management Consultant. Countryside Management Consultant. Coastal Trail Officer or suitably experienced officer of partner organisation (e.g. on secondment)</p>

<b>6. BASELINE USE/USER SURVEY AND MONITORING PROGRAMME</b>	
<b>Purpose</b>	<b>To establish baseline data on use/users of the Trail and a monitoring programme to assess the impacts of Trail development, promotion, management and investment. Results will guide future Trail development and marketing programmes and provide data on economic impacts of Trail.</b>
<b>Key Considerations</b>	<p>The baseline survey and monitoring will provide data on, for example -</p> <ul style="list-style-type: none"> <li>▪ levels and types of use, and origins and characteristics of users - enabling evaluation of trends and impacts on market sectors and socio-economic groups</li> <li>▪ users' expenditures and economic impact of Trail development</li> <li>▪ users' aspirations for/satisfaction with the Trail and Trail facilities and services.</li> </ul> <p>The survey should gather data for a variety of Trail sections, as levels of use and user characteristics will vary between well-established and new sections, urban areas/resorts and remoter rural areas.</p>
<b>Main Tasks</b>	<p><b>a. Initial data needs assessment, survey design and piloting</b></p> <ul style="list-style-type: none"> <li>▪ identify use, users, users' satisfaction, economic and other data requirements</li> <li>▪ identify existing surveys/data and extent to which surveys can build on these</li> <li>▪ learn from experience of surveys of National Trail and multi-user trails, including pros/cons of different techniques (e.g. use of volunteers, postal returns of distributed questionnaires, automatic people counters)</li> <li>▪ design and undertake pilot survey and review result and design and cost full baseline survey</li> </ul> <p><b>b. Baseline survey</b></p> <ul style="list-style-type: none"> <li>▪ undertake baseline survey and analyse data</li> </ul> <p><b>c. Regular monitoring</b></p> <ul style="list-style-type: none"> <li>▪ undertake and report on targeted annual monitoring of specific topics/sites</li> <li>▪ undertake full user survey and impact assessment on 5-yearly cycle</li> </ul>
<b>Indicative Costs &amp; Timescales</b>	<p>Initial Assessments, Survey Design and Piloting: £8-10k*; 5 month programme            Baseline Survey: £40-55k * : 15 month programme            Annual Monitoring: £6-10k *; 5-Yearly Survey: £30-45k *</p> <p>Costs of baseline survey and monitoring to be reviewed on basis of experience of initial assessments and baseline survey, respectively.            (* assumes support from rangers and volunteers after training to administer/distribute questionnaires, etc.)</p>
<b>Skills Required &amp; Likely Source</b>	<p>Visitor and economic impact survey design, administration, data analysis and reporting.            Academic or research consultants. Market research companies.</p>
<b>Existing Strategies, Surveys, etc.</b>	<p><i>Quality of Coastal Towns</i> surveys, Lancashire off-road cycling survey, Sustrans NCN surveys, Wirral country park surveys, etc..</p>

<b>7. MARKET AND ECONOMIC IMPACT ASSESSMENT</b>	
<b>Purpose</b>	<p><b>To assess the potential of the proposed Coastal Trail to -</b></p> <ul style="list-style-type: none"> <li>▪ <b>‘grow’ recreational and tourist Trail user markets</b></li> <li>▪ <b>contribute to the North West’s economy and employment, directly and by multiplier effects, through -</b> <ul style="list-style-type: none"> <li>- <b>Trail users’ expenditures</b> - e.g. on accommodation, sustenance, transport</li> <li>- <b>Trail development, management and marketing programmes</b> - including expenditures on labour and materials during the construction/improvement and maintenance stages, employment of Trail related staff, marketing spend.</li> </ul> </li> </ul> <p>Economic benefits - especially to rural areas - are an important rationale behind Trail development. Forecasts of market growth and economic benefits can help to support initial and on-going costs of Trail development and management. These assessments should address additionality - separating new expenditures from activity and expenditures displaced from other areas.</p> <p>This proposed programme of assessments will require -</p> <ul style="list-style-type: none"> <li>▪ information on existing use of the Trail, user market sectors and users’ expenditures from the baseline survey (Programme 6)</li> <li>▪ information on likely scales of capital and revenue expenditures during the development stage and thereafter. Construction and other Trail improvement works will account for much of the early expenditures (and incomes and employment generated) and the likely scale of these will be assessed through Programmes 1 and 2. Trail staffing, marketing and maintenance will provide important continuing incomes.</li> </ul>
<b>Key Considerations</b>	
<b>Main Tasks</b>	<p><b>a. Market impact assessment</b></p> <ul style="list-style-type: none"> <li>▪ identify baseline user markets* - including scale and expenditures by sectors</li> <li>▪ identify programmes with potential market impacts</li> <li>▪ assess scale of potential market growth by sectors (e.g. long distance and short-trip walking, cycling and riding day/multi-day users)</li> </ul> <p>[These assessments will require results of baseline user survey - Programme 6]</p> <p><b>b. Economic impact assessment</b></p> <ul style="list-style-type: none"> <li>▪ assess potential Trail users’ expenditures and potential jobs/incomes generated by such expenditures (focus on additionality)</li> <li>▪ identify the main economic components of Trail development and related programmes (e.g. construction labour, professional services, supplies), and on-going staffing and related costs of maintaining and managing Trail and providing visitor services - including direct, indirect and induced economic impacts</li> <li>▪ assess total economic impacts of Trail initiatives over initial development programme, and from users and other expenditures, once Trail is operational.</li> </ul> <p>[The assessments will require data from Programmes 1, 2, 3, 5 and 6]</p>
<b>Indicative Costs &amp; Timescales</b>	<p>Costs of assessments : £12-15k. 3-4 months 3 months</p>
<b>Skills Required &amp; Likely Source</b>	<p>Market and economic assessments, relating to recreation and tourism projects. Market research and economics consultants. Public agency staff with requisite skills</p>
<b>Existing Strategies, Surveys, etc.</b>	<p>None of direct relevance</p>

<b>8. MARKETING STRATEGY</b>	
<b>Purpose</b>  <b>Key Considerations</b>	<p><b>To promote a brand identity and awareness and use of the Trail and associated routes, attractions, facilities and services by local/regional residents and visitors from the North West, UK and overseas.</b></p> <p>The marketing strategy should define a marketing programme to begin in advance of the Trail launch and comprise a longer-term programme to 'grow' and sustain use of the Trail and associated 'products'. The development of a powerful brand identity and brand awareness will be a key component of the strategy.</p> <p>Consideration will need to be given to issues of the dual branding, where sections of the Trail overlap with other named/themed routes (e.g. Hadrian's Wall Path, proposed Mersey Waterside Way).</p> <p>The user survey (Programme 6) will assist the identification of target groups)</p>
<b>Main Tasks</b>	<p><b>Key tasks:</b></p> <ul style="list-style-type: none"> <li>▪ audit of current Trail-related marketing, including organisations, strategies, programmes and budgets</li> <li>▪ identify target market sectors and marketing approaches to reach each sector</li> <li>▪ to develop a strong corporate image/brand, 'strap-line' and logo for the Trail and promote brand awareness</li> <li>▪ prepare a marketing plan and design marketing programmes - including joint marketing programmes with DMOs and tourism businesses</li> <li>▪ prepare strategy and commercial plan for a 'family' of publications (e.g. costs, sales income)</li> <li>▪ establish targets, outcomes and programme for monitoring marketing activity.</li> </ul> <p><b>Marketing approaches</b> are likely to include -</p> <ul style="list-style-type: none"> <li>▪ press, media and other publicity contacts, releases and events</li> <li>▪ events, displays (e.g. at visitor centres) and Trail video</li> <li>▪ Trail guide, maps, accommodation guide, flyers, etc.</li> <li>▪ Trail Web-site (see separate proposal)</li> <li>▪ branding of route (e.g. logo, strap-line), facilities, rangers and publications.</li> </ul>
<b>Indicative Costs &amp; Timescales</b>	<p>Preparation of strategy : £18-22k. 6-8 months</p> <p>Costs exclude implementation costs (e.g. print and audio-visual design/production). These will be identified in the strategy.</p>
<b>Skills Required &amp; Likely Source</b>	<p>Marketing. Marketing and communications consultants.</p>
<b>Existing Strategies, Surveys, etc.</b>	<p><i>Information and Marketing Strategy for Morecambe Bay</i>, Morecambe Bay Partnership, 2002. <i>Cumbria Cycling Tourism Strategy</i> (in preparation)</p>

<b>9. COMMUNITY INCLUSION AND INVOLVEMENT STRATEGY</b>	
<b>Purpose</b>	<p><b>To enhance understanding of the needs and aspirations of socially and physically disadvantaged groups in respect of the proposed Trail.</b></p> <p><b>To devise projects and programmes to overcome barriers and realise opportunities to enhance the Trail’s accessibility (perceptually, physically and economically) for disadvantaged groups.</b></p> <p><b>To promote community involvement in Trail development and management and a sense of caring for, and ‘ownership’ of, the Trail.</b></p>
<b>Key Considerations</b>	<p>Social inclusion and community involvement and ‘ownership’ are key principles underpinning the Trail concept and proposals. The Trail passes in the vicinity of many socially and economically disadvantaged communities in urban and rural areas and this strategy will seek to ensure that the Trail benefits all members of the local and regional communities and visitors from all backgrounds.</p> <p>Community involvement will help to create pride and care for the Trail and a sense of community ‘ownership’ may deter vandalism, etc..</p>
<b>Main Tasks</b>	<p><b>Key Tasks</b></p> <ul style="list-style-type: none"> <li>▪ identify the principal concentrations of disadvantage communities, disabled/ special needs groups and ethnic groups in the vicinity of the Trail</li> <li>▪ through surveys and/or focus groups, identify the main barriers to, and opportunities to develop, Trail use by such groups</li> <li>▪ identify relevant health (e.g. health walks) and social inclusion programmes and indicate how the Trail can contribute to these</li> <li>▪ identify projects and programmes to promote awareness, use and enjoyment of the Trail by the above groups</li> <li>▪ identify programmes to involve communities in Trail planning, development and management</li> <li>▪ prepare an action plan for social inclusion and community involvement in Trail.</li> </ul> <p><b>Examples of projects and programmes</b></p> <ul style="list-style-type: none"> <li>▪ community participation/consultation programmes during Trail development</li> <li>▪ guided walks and cycle rides for those with less confidence or experience of countryside and urban recreation (e.g. some cultural groups) and the disabled</li> <li>▪ promoting public transport links to the Trail from surrounding communities</li> <li>▪ providing accessible Trail information (i.e. large lettering signs, easily understood interpretation, multi-language Trail leaflets)</li> <li>▪ health walks, green gyms and related schemes</li> <li>▪ voluntary/paid employment and intermediate labour market training for rangers, lengthsman or construction/maintenance team workers</li> <li>▪ projects to reduce criminal activity and nuisance behaviour in vicinity of the Trail</li> <li>▪ Trail users forums.</li> </ul>
<b>Indicative Costs &amp; Timescales</b>	<p>Community inclusion and involvement strategy: £12-15k 4-6 months</p> <p>Implementation costs will be identified in Strategy.</p>
<b>Skills Required &amp; Likely Source</b>	<p>Social inclusion programmes. Community participation and involvement programmes. Health promotion programmes.</p> <p>Local authority staff. Community development and health promotion professionals and consultants.</p>
<b>Existing Strategies, Surveys, etc.</b>	<p>Community plans. Social inclusion and health promotion strategies (various).</p>



<b>10. COMMUNICATIONS STRATEGY</b>	
<b>Purpose</b>	<b>To promote awareness, interest and support for the Trail concept and Trail development and encourage feedback from partner organisations, user groups, communities and others on how the Trail may best meet their needs and aspirations.</b>
<b>Key Considerations</b>	This strategy will be of particular importance at the early planning stages of the Trail and should include participative events, whereby local people and interest groups can influence Trail proposals. Also, there will be a need for an on-going communications and PR programme. The user survey (Programme 6) will assist the identification of target groups)
<b>Main Tasks</b>	<p><b>Key tasks:</b></p> <ul style="list-style-type: none"> <li>▪ identify target partner organisations and other stakeholders, including community and user groups and the best means of communicating with each</li> <li>▪ design and plan communications and participative/consultation programmes and means of responding to feedback in Trail planning and development</li> <li>▪ prepare communications plan - incl. actions, responsibilities, timing &amp; costs</li> <li>▪ establish targets and outcomes and programme for monitoring communications.</li> </ul> <p><b>Communication 'vehicles'</b> are likely to include -</p> <ul style="list-style-type: none"> <li>▪ press, media and other publicity contacts, releases and events</li> <li>▪ presentations and reporting to partner organisations, etc.</li> <li>▪ public and target audience meetings, participative workshops and seminars</li> <li>▪ events, displays (e.g. at visitor centres) and Trail video</li> <li>▪ Trail prospectus and partner/public newsletters (print &amp; electronic media)</li> <li>▪ Trail Web-site (see separate proposal)</li> </ul>
<b>Indicative Costs &amp; Timescales</b>	Preparation of strategy : £8-12k.      4-6 months Costs exclude implementation costs - to be identified in the strategy.
<b>Skills Required &amp; Likely Source</b>	Communications consultancies. Experts in community involvement/consultations.
<b>Existing Strategies, Surveys, etc.</b>	None of direct relevance

<b>11. WEB SITE DEVELOPMENT AND MAINTENANCE</b>	
<b>Purpose</b>	<p><b>Web site will play key roles at -</b></p> <p><b>a. Trail Planning and Development Stage</b></p> <ul style="list-style-type: none"> <li>▪ to create public and media awareness and encourage feedback on Trail proposals and development</li> <li>▪ to encourage community, business and other involvement in developing the Trail and associated services - including information on funding for Trail-related voluntary projects, business development, etc.</li> <li>▪ to keep partner organisations and interest groups informed of plans, etc.</li> </ul> <p><b>b. Trail Operational Stage</b></p> <ul style="list-style-type: none"> <li>▪ to publicise and promote Trail - locally, regionally, inter-/nationally</li> <li>▪ to provide information and news - e.g. route, events, new sections, surveys</li> <li>▪ to provide a discussion forum and encourage feed-back from users</li> <li>▪ to publicise 'Friends' and related groups and their activities</li> <li>▪ to provide sales outlet for maps, guides and Trail-related merchandise</li> <li>▪ to provide links to Trail managers, partners' Web sites, TICs, etc.</li> </ul> <p>The Web site will be an increasingly important 'delivery' mechanism for the marketing, communication and interpretive/education strategies (Programmes: 8, 9 and 10). Maintenance and frequent up-dating will be crucial to the site's success. Map-based information at a range of scales will be a key component of the site.</p> <p>A basic Web-site will be established at an early stage and developed prior to launch of 1<sup>st</sup> Phase of Trail to include GIS links, etc.</p>
<b>Key Considerations</b>	
<b>Main Tasks</b>	<p><b>Develop and agree Web site strategy</b></p> <ul style="list-style-type: none"> <li>▪ scoping - identify options and ensure agreement of partners on roles of Web site, audiences, potential content and operational and funding options</li> <li>▪ develop/agree business plan, including responsibilities for development, funding, sponsorship, advertising and merchandising incomes and site maintenance (e.g. partner organisation, Friends group, agency)</li> </ul> <p><b>Phase 1 : Establish basic Web site</b></p> <ul style="list-style-type: none"> <li>▪ basic Web site design and establishment</li> <li>▪ information gathering, content collation and inclusion on site</li> <li>▪ initial publicity for site</li> </ul> <p><b>Phase 2 : Establish full Web site (+ GIS links)</b></p> <ul style="list-style-type: none"> <li>▪ design full Web site, including further technical design and implementation, information gathering and incorporation of GIS-based information</li> <li>▪ train staff to maintain Web site</li> <li>▪ publicise site - through tourism publications, outdoor magazines, press, etc.</li> <li>▪ ensure links from/to related sites - e.g. tourism, national trails, local authority, Countryside Agency, user group and other sites</li> </ul> <p><b>Review and maintain Web site</b></p> <ul style="list-style-type: none"> <li>▪ review and redesign site, as required</li> <li>▪ maintain, up-date and monitor site and service users (e.g. respond to information requests and complaints about Trail).</li> </ul>
<b>Indicative Costs &amp; Timescales</b>	<p>Develop and agree Web site strategy }  Phase 1 - develop initial Web site } £12-16                  6-8 months</p> <p>Phase 2 - develop full Web-site with GIS links : £36-40k - including purchase of Web publishing module, Web-based software + mapping license (e.g. MapXtreme), prepare information, staff training, etc..          6-8 months</p> <p>Annual costs : £4k - hosting, technical support/maintenance/up-dating software, etc</p>
<b>Skills Required &amp; Likely Source</b>	<p>Web site planning and design. IT, GIS and Trail marketing expertise.  Web site development consultants</p>
<b>Sources of Estimates</b>	<p>exeGesIS SDM Ltd. (<a href="http://www.esdm.co.uk">www.esdm.co.uk</a>, 01874 711145)</p>

<b>12. INTERPRETATION AND EDUCATION STRATEGY</b>	
<b>Purpose</b>	<b>To deliver and promote a range of attractive, exciting and innovative interpretation and educational opportunities and services, which stimulate and enhance understanding, appreciation, care and enjoyment of the Trail corridor and associated heritage, environmental and cultural features.</b>
<b>Key Considerations</b>	<p><b>Discovery</b> is an underpinning theme for the Trail. These strategies will promote discovery, through specific interpretive and educational products and programmes, and coordinating and jointly promoting interpretive and educational assets along the Trail corridor - e.g. historic towns, archaeological sites, wildlife species and habitats, geological features, local tales and crafts, science museums, galleries and visitor centres. Distinction should be made between:</p> <ul style="list-style-type: none"> <li>▪ <b>interpretation</b> - facilities and services directed towards the leisure visitor and aimed at increasing awareness, appreciation and enjoyment of the natural and cultural heritage of the Trail corridor</li> <li>▪ <b>education</b> - more formal teaching (often curriculum-linked) aimed at educational groups, including primary, secondary, tertiary or adult education groups.</li> </ul>
<b>Main Tasks</b>	<p><b>Interpretation component</b></p> <ul style="list-style-type: none"> <li>▪ audit and assess existing interpretation facilities and services - including providers and standards</li> <li>▪ identify target markets, key themes and features of special interpretive value</li> <li>▪ recommend new or up-graded interpretation products and programmes and identify the capital and revenue costs of these</li> <li>▪ prepare interpretation action plan - incl. actions, responsibilities, timing &amp; costs</li> <li>▪ identify means of delivering and coordinating interpretation - including the roles of ranger services and public, private and voluntary partner organisations.</li> </ul> <p><b>Education component</b></p> <ul style="list-style-type: none"> <li>▪ audit existing educational facilities and services - incl. providers and standards</li> <li>▪ identify existing educational use of coast and facilities along Trail corridor</li> <li>▪ identify target educational markets, key educational opportunities, themes and features and scope for new/enhanced educational products and programmes (e.g. teachers' guide and materials related to national/local learning grids)</li> <li>▪ prepare educational action plan - incl. actions, responsibilities, timing &amp; costs</li> <li>▪ identify means of delivering, coordinating and promoting educational services.</li> </ul> <p><b>Trail-related interpretation/education products and programmes</b> may include</p> <ul style="list-style-type: none"> <li>▪ publications, Website content and Trail video</li> <li>▪ on-site interpretive boards, signs and installations (e.g. sculptures, industrial artefacts)</li> <li>▪ visitor centres and displays in public places</li> <li>▪ education packs and educational programmes run by outdoor centres, etc.</li> <li>▪ guided walks and cycle rides, rangers' talks, etc.</li> </ul>
<b>Indicative Costs &amp; Timescales</b>	Preparation of strategy : £25-30k; 6-8 months Costs exclude implementation costs (e.g. print and audio-visual design/production, ranger inputs). These costs will be identified in the strategy
<b>Skills Required &amp; Likely Source</b>	Heritage and environmental interpretation planning. Educational skills most likely to be provided by specialist consultants.  Interpretation consultant. Educational colleges, rangers, etc. may contribute to educational component.
<b>Existing Strategies, Surveys, etc.</b>	<i>Information and Marketing Strategy for Morecambe Bay</i> . Mermaid's Purse (Living Earth Foundation & Morecambe Bay Partnership.

<b>13. TRAIL USER SERVICES AUDIT AND DEVELOPMENT PROGRAMME</b>	
<b>Purposes</b>	<p><b>To collate information and promote provision and improvements to visitors services of particular value to Trail users</b> - see examples below.</p> <p><b>To promote awareness and use of local visitor services by Trail users.</b></p>
<b>Key Considerations</b>	<p>Visitor services of particular value to Trail users will include visitor information services, walking, cycling and riding holiday operators, walking guides, cycle hirers/repairers, riding centres, outdoor equipment retailers, and accommodation, food and transport providers (see also Programme 14).</p> <p>The development, provision and marketing of such services - especially targeted to suit Trail users' needs (e.g. walker/cyclist-friendly accommodation with drying facilities, cycle storage, etc.), will be a key component of the Trail development programme. It is through such provision that the Trail can best contribute to the economies of the areas through which it passes - especially more rural areas.</p>
<b>Main Tasks</b>	<p><b>a. audit current/potential user services and identify the principal strengths weaknesses, gaps and opportunities</b> - collate data on GIS base.</p> <p><b>b. prepare strategy to develop, enhance and promote such services for Trail users</b> - including through:</p> <ul style="list-style-type: none"> <li>▪ promoting business development and 'green tourism' grants and advice to potential Trail services providers; possibly, through existing tourism/small business advisory services</li> <li>▪ developing and promoting a walker/cyclist-friendly accommodation scheme for accommodation and other service providers who meet agreed criteria</li> <li>▪ promoting Trail services information through Trail leaflets, Web site, etc.</li> </ul> <p><b>c. implement and monitor strategy</b></p>
<b>Indicative Costs &amp; Timescales</b>	<p>Costs of audit and strategy preparation : £14-16k 4-6 months</p> <p>Costs of implementation to be identified in strategy.</p>
<b>Skills Required &amp; Likely Source</b>	<p>Tourism planning and marketing.</p> <p>Tourism consultants. Public sector tourism units (local authorities, NWDA).</p>
<b>Existing Strategies, Surveys, etc.</b>	<p>Various tourism strategies targeted at coastal or activity visitor markets - including <i>West Cumbria Tourism Strategy</i> and <i>Cumbria Cycle Tourism Strategy</i>. <i>Quality of Coastal Resorts</i> and Market Towns surveys and initiatives.</p> <p>Existing business advisory services (e.g. Business Links)</p>

<b>14. PUBLIC TRANSPORT AUDIT AND 'GREEN TRAVEL' STRATEGY</b>	
<b>Purposes</b>	<p>To collate information, promote provision and, where necessary, improvements to public transport serving the proposed Trail and linked circular routes, etc..</p> <p>To promote the use of public transport services for access to/from the Trail and, where desired, as a means of travel along sections of the Trail - especially as a means of accessing the Trail for non-car owners and encouraging sustainable recreational and tourism travel by Trail users.</p> <p>To make public transport operators aware of Trail and users' needs and encourage provision for Trail users.</p>
<b>Key Considerations</b>	<p>Public transport services will play important contributions to social inclusion strategies for the Trail and promoting 'green' travel. Services will enable travel to/from and along the Trail and to linked routes; thereby, encouraging day, multi-day and tourist use, enabling circular long-distance travel on foot, cycle or horse (e.g. access from Europe to Hull and return from Newcastle, via Trans Pennine Trail, North West Coast Trail and Hadrian's Wall Path/Cycle Route or C2C Cycle Route). Also, public transport use can overcome long detours around estuaries or sections through urban/resort areas, which may be detractors to some users.</p> <p>Transport providers will require to be aware of Trail users' needs (e.g. cycle carriage on trains/buses).</p>
<b>Main Tasks</b>	<p><b>a. Audit public transport services connecting to/along Trail</b> - including bus, tram, rail, ferry and 'plane services, and transport information provision (published and on-line) and assess principal strengths weaknesses, gaps and opportunities. Data should be collated on GIS base</p> <p><b>b. Prepare strategy to promote and optimise public transport services for Trail users</b> - including, for example:</p> <ul style="list-style-type: none"> <li>▪ Trail users' 'green travel' guide and Trail Web site travel information</li> <li>▪ ensuring transport providers' awareness of the Trail and users' needs and encouraging provision for cyclists on cross-estuary trains, resort trams, etc.</li> <li>▪ promoting out-and-back/circular trip opportunities linked to Trail - e.g. rail walks</li> <li>▪ encouraging Trail walkers' bag carrying minibus services</li> <li>▪ promoting transport services from disadvantaged communities to Trail.</li> </ul> <p><b>c. Implement and monitor strategy</b></p>
<b>Indicative Costs &amp; Timescales</b>	<p>Costs of audit and strategy preparation : £12-15k. 3-4 months</p> <p>Costs of implementation and on-going information services to be identified in strategy.</p>
<b>Skills Required &amp; Likely Source</b>	<p>Leisure transport planning and marketing. Knowledge of regional and local public transport service providers.</p> <p>Leisure transport consultants. Local authority transport planning units.</p>
<b>Existing Strategies, Surveys, etc.</b>	<p><i>ECOtravel</i> sustainable mobility information bureau on Merseyside. <i>Travelwise</i>. <i>Cumbria Public Transport Map</i>. <i>Cheshire for All</i> on-line travel information service.</p>

<b>15. TRAIL DESIGN AND VISITOR MANAGEMENT DEMONSTRATION PROJECTS</b>	
<b>Purpose</b>	<b>To develop, test and promote good practice in aspects of Trail landscaping, security and visitor management, which seek to resolve issues identified by Trail partner organisations, or illustrate means of ‘greening’ the Trail corridor - especially in urban areas.</b>
<b>Key Considerations</b>	<p>Preliminary discussions with partner organisations have identified several design and management issues or opportunities, in relation to which demonstration solutions would be of assistance to the wider Trail development programme; e.g. -</p> <ul style="list-style-type: none"> <li>▪ <b>‘greening’ of the Trail corridor in urban areas</b> - especially poorer quality environments (e.g. sections through Liverpool), where greening of the Trail and its environs may provide a stimulus for wider environmental improvements</li> <li>▪ <b>security of infrastructure</b> - e.g. theft of surface materials, signs and seats</li> <li>▪ <b>personal safety of Trail users</b> - e.g. enclosed urban corridors, especially at dusk and locations where vandalism is evident</li> <li>▪ <b>Trail design to enable disabled use</b></li> <li>▪ <b>potential user impacts</b> - especially in vicinity of sensitive habitats, or on less robust ground (e.g. bird breeding sites, dune and wetland sections)</li> <li>▪ <b>visitor management issues</b> - such as perceived threats of congestion, nuisance and environmental disturbance by visitors in peak periods leading to local opposition to Trail (e.g. Grange to Carnforth)</li> <li>▪ <b>development of loop and link routes</b> - illustrating how the Trail may act as a spine linked to local footpath and cycling networks and demonstrating ways of linking urban and rural areas</li> </ul> <p>Solutions to many such problems have been developed by Sustrans and others, but demonstration projects on the proposed Trail will have benefits for all the Trail and enhance the confidence of Trail partners, users and adjacent communities.</p> <p>Some existing projects in the vicinity of the Trail may provide demonstrate projects (e.g. local loop and link routes around Silloth).</p>
<b>Main Tasks</b>	<p><b>Key tasks:</b></p> <ul style="list-style-type: none"> <li>▪ identify around 8 demonstration sites and issues/opportunities relating to these</li> <li>▪ identify key stakeholders with interests in each site, including local users and communities, and undertake participatory appraisal of issues and opportunities</li> <li>▪ research and develop design/management solutions for demonstration sites and identify costs and agencies responsible for implementing each project</li> <li>▪ monitor, assess and document lessons from demonstration projects</li> <li>▪ prepare illustrative factsheets to inform wider Trail partnership and interest groups of outcomes and promote more general take-up of successful projects.</li> </ul>
<b>Indicative Costs &amp; Timescales</b>	<p>£70-90k: identifying and consulting on projects/sites, developing solutions, monitoring and documenting up to 8 projects. Implementation costs to be identified at design stage.</p> <p>Setting up projects, design and implementation : 12 months Monitoring and documenting projects : 18 months.</p>
<b>Skills Required &amp; Likely Sources</b>	<p>Landscape planning and design. Engineering and Trail construction. Environmental and visitor management. Sustrans. Groundwork Trusts. Local Authorities. Consultants.</p>
<b>Existing Strategies, Surveys, etc.</b>	<p>Trail standards and design guidelines and information prepared by Countryside Agency, Sustrans, Fieldfare, Paths for All Partnership, etc..</p>

## 4. PROJECT MANAGEMENT AND IMPLEMENTATION PROGRAMMES

### 4.1 The Project Management Programme and Implementation Programme

4.1.1 Progress on developing the Coastal Trail and achieving the associated objectives (e.g. social inclusion, health promotion, tourism market growth, rural recovery) will largely depend on the effective and timely completion of the preliminary investigations and strategies set out in section 3. These investigations and strategies will provide the basis for developing or improving the Trail infrastructure, ensuring adequate facilities and services to enable enjoyment of the Trail and delivering the related social, economic and environmental programmes. In addition, these investigations and strategies will enable the development of costed action programmes to support funding bids to partner organisations and strategic funding bodies.

4.1.2 To enable the effective coordination and progress on the preliminary investigations and strategies and the subsequent delivery of Trail-related programmes, the following section sets out -

a. **a Project Management Programme** (Figure 4.1) - illustrating the inter-dependencies and inter-linkages between the various investigations and strategies and providing a logical programme for undertaking these over a 5-year period

b. **an Implementation Programme** (Figure 4.2) - which adopts a longer-term perspective (10+ years) and shows how the various investigations and strategies will contribute to the delivery of the Trail and related programmes.

These programmes are explained in more detail below and an outline risk assessment (Figure 4.3) has been undertaken to illustrate the potential effects of funding shortfalls or time delays in respect of specific investigations and strategies.

4.1.3 A small Trail Coordination Unit is proposed to ensure effective and timely progress on the implementation of the Project Management Programme and Implementation Programme. This Team will comprise the executive 'arm' of the recommended Coastal Trail Management Partnership. The organisational recommendations, and indicative costs of the Coordination Unit, are outlined in section 5.

### 4.2 The Project Management Programme

4.2.1 The Project Management Programme (Figure 4.1) focuses on the delivery of the preliminary investigations and strategies over the initial 5-year period. Specific investigations and strategies are highlighted as being critical to the funding, development and management of the Trail (e.g. Trail survey and infrastructure development strategy, crossings options assessments, funding strategy, business plan for Trail Partnership) and the diagram shows the key linkages and inter-dependencies between programmes. Also, it shows the costs and timescales of each element of the programme and the overall range of costs.

4.2.2 The 5-year period for this programme has been selected intentionally to match the proposed completion and launch of the first phase of Trail development by the end of Year 5 (see Figure 4.2). **The spread of projects over a 5-year period recognises -**

- **that several strategies are dependent on information from preceding investigations or strategies** - for example, the market and economic impact assessment will require data from the Trail development strategy and baseline user survey and the second-stage Web site will require information from the communications and interpretive and education strategies and user services audit
- **the need to spread costs over the programme period** - as funding is unlikely to be available to undertake all of the investigations and strategies in Years 1 and 2





Figure 4.2 Implementation Programme

Survey, Assessment or Strategy	Years										
	1	2	3	4	5	6	7	8	9	10	
<b>1. Trail survey &amp; infrastructure development strategy</b>	survey and strategy development		<b>Complete &amp; Launch :</b> Chester-Southport (Mersey Waterfront section) Lytham-Morecambe Carlisle/Hadrian's Wall Path-St Bees/C2C					<b>Complete &amp; Launch :</b> Chester-Liverpool/TPT link (via Runcorn) Lancashire section C2C-Barrow; Ulverston-Counties border		<b>Complete &amp; Launch :</b> Coastal Trail	
<b>2. River &amp; estuary crossings options assessment</b>		assess options									
<b>3. Asset management strategy &amp; Trail Management System</b>	TMS software		asset man. strategy	on-going asset management; up-dating and using Trail Management System data							
<b>4. Funding strategy</b>		strategy development	prepare and submit funding bids; keep funding under review								
<b>5. Business plan for Trail Management Partnership</b>	develop business plan	implement, monitor & review plan and budgets			3-yearly review	implement, monitor & review plan and budgets		3-yearly review	implement, monitor & review plan and budgets		
<b>6. Baseline use/user survey &amp; monitoring programme</b>		baseline user survey		key sites monitoring				5 year user survey	key sites monitoring		
<b>7. Market and economic impact assessment</b>			assess impacts	on-going monitoring - based on user survey (Programme 6)				market/economic review	on-going monitoring		
<b>8. Marketing strategy</b>		strategy development	on-going Trail marketing programme (+ periodic reviews)								
<b>9. Community inclusion/ involvement strategy</b>		strategy development	on-going social inclusion, health promotion and community involvement programmes (+ periodic reviews)								
<b>10. Communications strategy</b>	strategy development	consult on Trail proposals				on-going communications programme (+ periodic reviews)					
<b>11. Web site development &amp; maintenance (+ GIS links)</b>		Initial Website	maintain initial Web-site		Full Web-site + GIS links	maintain/up-date Web-site					
<b>12. Interpretation &amp; education strategy</b>			strategy development	implement interpretive & education strategy							
<b>13. Trail user services audit &amp; development programme</b>			audit & programme development	implement tourism services development programme							
<b>14. Public transport audit &amp; 'green travel' strategy</b>				strategy development	implement public transport and 'green travel' programme						
<b>15. Design/visitor management demonstration projects</b>			design, implement & monitor demonstration projects		implement design and visitor management techniques from demonstration projects						

Note: Trail sections referred to in programmes 1 and 2 are illustrative      Key;  programmes with critical timing       programmes with less critical timing

- **the scale of project management tasks associated with the investigations and strategies** - for example, brief preparation, tender specification and letting, contract supervision, review of outputs. It is unlikely that staff resources will be available to undertake the project management tasks over a tighter timescale.

4.2.3 While the Project Management Programme is shown as covering Years 1 to 5, the exact years have not been specified, as the start year will depend on available funding. **It is recommended that the Project Management Programme should cover the period 2005/6-2009/10 - enabling the completion and official launch of the first stages of the Trail and initial Website by 2010.** Preliminary discussions with partner organisations have revealed that sufficient funding is unlikely to be available to enable an earlier start (i.e. 2004/5) - especially, as the investigations with most priority are those which are the most capital intensive (i.e. Trail survey and infrastructure development strategy, river and estuary crossings options assessments).

### 4.3 The Implementation Programme

4.3.1 The Implementation Programme focuses on an initial 10-year implementation period. **Completion of the Implementation Programme within the recommended 10-year period should enable the launch of the full Coastal Trail by 2015, subject to adequate funding being available for the preliminary investigations, surveys and infrastructure works from 2005/6 onwards.** The Programme illustrates how selected sections of the Trail may be completed and launched in advance of the full launch in Year 10; for example, it is suggested that -

- by Year 5, it may be feasible to complete and launch the Chester to Southport (including Mersey Waterfront Way and Trans Pennine Trail links), Lytham to Morecambe and Carlisle/Hadrian's Wall Path to St. Bees (Coast to Coast Path/C2C Cycleway links) sections, subject to funding availability
- by Year 8, it may be feasible to complete the majority of other sections of the Trail - including the Chester to Liverpool (via Runcorn; including Trans Pennine Trail link), the Lancashire sections of the Trail and parts of the Trail in Cumbria (e.g. St. Bees to Barrow, Ulverston to Cumbria/Lancashire border), but, possibly, excluding some of major estuary crossings and sections in Cumbria requiring difficult negotiations or construction works (e.g. cycle route sections avoiding main roads). The aim will be to complete these final sections by Year 10.

4.3.2 Figure 4.2 illustrates, also, how the various programmes - based on the preliminary strategies - will be progressed over the 10-year period and beyond. In several cases, provision is made for reviews - e.g. 5-yearly user survey, review of market and economic impact data after 5 years, and 3-yearly reviews of the business plan for the Trail Management Partnership. Both the Implementation Programme and the Project Management Programme will need to be closely monitored to avoid slippage in individual elements and these Programmes will require to be fully reviewed on a frequent basis (e.g. annually).

### 4.4 Outline Risk Assessment

4.4.1 The principal risks relating to the completion of the preliminary investigations and strategies, and the subsequent implementation of the Trail infrastructure and associated programmes, are likely to be associated with -

- **shortfalls in funding** - for example, as a result of delays in sourcing necessary funds, shortfalls in funding commitments by project partners, or cost over-runs
- **delays in timing** - as may result from delays in gaining access agreements or securing public rights of way, specific partners or contractors failing to meet targets, unforeseen engineering difficulties, etc..

**Figure 4.3 Outline Risk Assessment for Project Management and Implementation Programmes**

Investigations and Strategies (including delivery)	Key Risks	Probability of Risk	Level of Effect	Principal Implications for Trail Development and Programmes
1. Trail survey & infrastructure development strategy	lack of funding time delay	high high	critical critical	delay in Trail development + lack of key data for funding strategy
2. River & estuary crossings options assessment	lack of funding time delay	high high	high high	delay in implementation + lack of key data for funding strategy
3. Asset management strategy & Trail Management System	lack of funding time delay	moderate moderate	high high	TMS is essential data handling tool. Asset management is key to cost-effective management of Trail
4. Funding strategy	lack of funding time delay	moderate moderate	critical critical	funding is critical to progress on all aspects of Trail
5. Business plan for Trail Management Partnership	lack of funding time delay	moderate moderate	critical critical	Business plan is critical for formation, funding and operation of Partnership
6. Baseline use/user survey & monitoring programme	lack of funding time delay	moderate moderate	high high	lack of data for Trail design, marketing, economic assessments, etc
7. Market and economic impact assessment	lack of funding time delay	moderate low	high high	assessments are critical to 'selling' potential of the Trail to funders, etc.
8. Marketing strategy	lack of funding time delay	moderate low	high high	delay in market awareness, market growth & economic benefits
9. Community inclusion/ involvement strategy	lack of funding time delay	moderate low	moderate moderate	delay in implementing important Trail-related programme
10. Communications strategy	lack of funding time delay	moderate low	moderate moderate	delay in achieving awareness & feedback from consultations
11. Web site development & maintenance (+ GIS links)	lack of funding time delay	moderate low	moderate moderate	delay in market awareness, market growth & economic benefits
12. Interpretation & education strategy	lack of funding time delay	moderate low	low low	delay in implementing important Trail-related programme
13. Trail user services audit & development programme	lack of funding time delay	moderate moderate	moderate moderate	delay in bringing services up to expected standards, etc.
14. Public transport audit & 'green travel' strategy	lack of funding time delay	moderate low	low low	delay in implementing important Trail-related programme
15. Design & visitor management demo projects	lack of funding time delay	moderate moderate	low low	lack of benefits of demo. projects

4.4.2 The probability, levels of effects/impacts, and the principal implications of the above risks is shown in Figure 4.3. The principal effect of shortfalls in funding and delays in timing are the 'knock-on' effects on the overall Trail development programmes and delivery of specific programmes. **The investigations and strategies identified as being critical to the overall Trail development programme are -**

- **Programme 1. Trail survey and infrastructure development strategy**
- **Programme 4. Funding strategy**
- **Programme 5. Business plan for the proposed Coastal Trail Management Partnership.**

4.4.3 Funding problems or time delays in several other investigations and strategies may have serious implications for achieving the overall Trail development programme and associated programmes; especially, any delays in the delivery of -

- Programme 2. River and estuary crossings options assessment
- Programme 3. Asset management strategy and Trail Management System
- Programme 6. Baseline use/user survey and monitoring programme

- Programme 7. Market and economic impact assessment
- Programme 8. Marketing strategy.

#### 4.5 Costs of the Initial Investigations and Strategies

4.5.1 The Project Management Programme is intended to build a sound foundation for the development, management and marketing of the proposed North West Coast Discovery Trail and the delivery of Trail-related tourism, community development, environmental and other programmes. **The estimated costs over the 5-year Project Management Programme period are estimated as £0.53-0.63m** (excluding implementation costs, staff costs and VAT).

4.5.2 The estimated costs must be considered against the perspectives of -

- a. the Trail will provide a major new regional and national, recreational, tourism, environmental and community asset for the North West Region**
- b. Trail-related programmes will deliver a wide range of public policy objectives** - e.g. health promoting, 'greening' sustainable recreation, tourism and travel, rural recovery
- c. potential for the Trail to bring major new tourism and day visitor expenditures and associated income and employment to the North West and, especially, to its coastal communities** - for example, over ¼-million users of the Pembrokeshire Coast Path spent some £14m/year and supported 567 fte jobs in 1996/7, cyclists on the C2C cycle route, which will link to the Coastal Trail, generated expenditures of around £1.5m in 2000
- d. potential for the costs being shared by a range of partner organisations - several of which are committed to, or are considering, major investments in sections of the proposed Trail or related projects** - the proposed Trail Programme will complement and 'add-value' to initiatives, such as the Mersey Waterfront Regional Park and Waterfront Way, Wirral Waterfront Way, Ribble Regional Park, Cumbria's Coastal Beacon Projects and potential extension of the Hadrian's Wall Path National Trail southwards along the Cumbrian coast
- e. the requirement for sound planning of the multi-£m investment, which will be required over the next 10 years, or so, to ensure the development and subsequent management of a top-class, multi-use Trail** - over half of the total costs of the Project Management Programme relate to preliminary route surveys, engineering assessments, good practice demonstration projects and the development of asset management practices, which are intended to ensure the optimum routing, design and longer-term, sustainable management of the proposed Trail.

4.5.3 Amongst the key challenges for the Trail partner organisations will be to -

- a. ensure that costs of the Trail programmes are shared across the several local authorities and other potential partner agencies**
- b. secure strategic funding support** - e.g. EU, Lottery and/or SRB funding for the initial investigations and strategies and subsequent implementation of the Trail development and associated programmes
- c. make an early start to the Trail programmes, in order to take advantage of existing funding sources, some of which may only be available for a restricted period** - e.g. rural recovery funding programmes, specific EU programmes.

## 5. TOWARDS AN EFFECTIVE TRAIL MANAGEMENT STRUCTURE

### 5.1 Consideration of Potential Management Arrangements

5.1.1 Developing, managing and marketing the Coastal Trail to high standards and undertaking associated programmes (e.g. 'greening', tourism product and market development and social inclusion programmes) will bring substantial benefits to the North West, but will require multi-£m investments and a sustainable, effective and efficient management structure. This section -

- identifies and assesses the involvement and capabilities of a range of partner organisations with current or potential involvement in the Coastal Trail (s. 5.2)
- identifies key requirements, tasks and capabilities required for Trail development and management (s. 5.3)
- discusses and provides recommendations for an organisational framework, including staff support, to progress the development, management and marketing of the proposed Coastal Trail (s. 5.4)
- provides initial, indicative costs for running and establishing the proposed management organisation (s. 5.5).

5.1.2 The recommendations for future management arrangements are presented for consideration by potential partner organisations. Once the detailed management framework is confirmed and commitments are made to progressing the development of the Trail, a more detailed business plan will be required and the management organisations will need to be formally constituted.

### 5.2 Current Involvement and Capabilities of Key Organisations

5.2.1 Many organisations have responsibilities and/or interests in the proposed Coastal Trail and existing sections of path, cycleway, minor roads and other routes, which may comprise parts of the Trail. Amongst current and/or potential 'key players' are -

- **local authorities** - the respective county councils, unitary authorities and, in some cases, their agents (e.g. Carlisle City Council and Capita in Cumbria), administer and maintain the public rights of way network, promoted trails, cycleways, footways and minor roads, which will comprise much of the proposed Trail. The local authorities and some parish councils provide amenities (e.g. car parks, toilets), information (e.g. signs, leaflets) and, in several cases, ranger services, or similar (e.g. Lancaster City Council's part-time lengthsman on the Lancaster-Morecambe Cycleway, Lake District National Park Authority's ranger service on part of the Cumbria Coastal Way). Sefton MBC intends commissioning an access strategy for the Sefton Coast, which will provide useful information for the proposed Coastal Trail.

There are uncertainties over the future structure of local government in the North West. If voters in the forthcoming referendum support the establishment a Regional Assembly, new unitary authorities will replace the county and district councils, but the boundaries of these new authorities are still under consideration

- **North West Coastal Forum** - the Forum has promoted the Coastal Trail concept and advised on the previous *Concept Feasibility Study* and this *Implementation Framework* through the North West Coastal Trail Steering Group. While, potentially, providing continuing support for the proposed Trail, the Forum lacks the corporate powers required to progress its development

- **North West Development Agency** - the Agency funded the *Concept Feasibility Study* and is funding programmes and projects of relevance to the Coastal Trail - e.g. coastal resorts, market towns and rural recovery programmes. The NWDA's *Regional Parks Interim Policy Statement* (2004) indicates that the Agency will support the Coastal Trail in principle, assist the development of funding packages to facilitate further pilot work, encourage partners to include the Trail in their Sub-Regional Action Plans and encourage the preparation of a project plan for the development of the Trail as a regional park project
- **North West Regional Assembly** - the NWRA supports the Trail concept and, as Secretariat for the Coastal Forum, organised the launch of the Trail concept and has commissioned and supported the preparation of this *Implementation Framework*
- **Government Office for the North West** - GONW, as former Secretariat for the Coastal Forum, commissioned and supervised the *Concept Feasibility Study*
- **North West Tourist Board** and **Cumbria Tourist Board** - these Boards have been represented on the Trail Steering Group, the Cumbria Tourist Board has signed up in support of the principle of the Trail, and they have played important marketing and tourism development roles for attractions, accommodation and other services along sections of the proposed Coastal Trail. These Tourist Boards will be replaced in 2004 by the NWDA - as strategic tourism agency, supported by five **District Marketing Organisations** (DMOs) - four with responsibilities for areas along the Trail
- **Mersey Waterfront** - this 'new player' is developing proposals for a Mersey Waterfront Way, as a spine of the Mersey Waterfront Park. The Waterfront's Board intends commissioning a survey of the route of the Waterfront Way in 2004. The Waterfront's parent body - the Mersey Partnership - will become a tourism DMO
- **Sustrans** - Sustrans has developed sections of the National Cycle Network and undertaken other cycleway surveys, development and promotional work along the North West's coast. Sustrans' Area Manager for Cumbria has been preparing the *West Cumbria Cycle Tourism Strategy*
- **Groundwork Trusts** - West Cumbria, West Lancashire, St. Helens, Knowsley and Sefton and Wirral Groundwork Trusts' areas include sections of the Coastal Trail and have been involved in path and cycleway development, or have the capacity to assist. Groundwork West Cumbria has a cycleway development team and a cycle path maintenance company and has undertaken several cycleway projects
- **AONB management units** - the Solway AONB and Arnside and Silverdale AONB management units have created recreational routes and undertaken environmental improvements and information and interpretive projects
- **Morecambe Bay Partnership** - as a supporter of the Coastal Way concept, the Partnership prepared the *North West Coastal Footpath - Summary of the Missing Links in the Golden Thread and the estimated costs to complete*. Also, it has published a communications and interpretive strategy for the Morecambe Bay area
- **various NGOs, voluntary groups and other organisations** (e.g. RSPB, CPRE, RA, BHS and CTC) - several such organisations have supported the North West Coastal Forum and 'signed up' to support the Coastal Trail concept. Future support and involvement of such organisations - as land managers (e.g. RSPB, National Trust, Wildlife Trusts) and potential providers of voluntary support (e.g. voluntary wardens, volunteer support for Trail maintenance or surveys) will be important to the success of the Trail and its engagement of local communities.

5.2.2 **Key strengths and/or opportunities** associated with current organisations and partnership associated with the Coastal Trail proposals include -

- a. **enthusiasm and support of several key individuals and organisations** - several key individuals and organisations have 'championed' the Trail concept and been instrumental in its progress to the current stage
- b. **local knowledge and expertise in public rights of way, cycleways and related aspects of trail development** - local authority staff and staff of, for example, the AONB management units, Sustrans and Groundwork West Cumbria, have considerable local knowledge and expertise in the design, development and maintenance of walking, cycling and multi-use routes
- c. **previous initiatives can contribute to Trail development** - the local authorities and other organisations have created strategic and promoted routes (e.g. Wirral Way, Lancashire and Cumbria Coastal Ways, Lancaster-Morecambe Cycleway), which will provide valuable sections of the Coastal Trail or links to the Trail (e.g. Hadrian's Wall Path, C2C Cycle Route, Trans Pennine Trail)
- d. **partner organisations' supportive strategies and programmes** - potential partner organisations have developed/are developing strategies, feasibility studies and programmes with potential to contribute to Trail development. Examples are *Cumbria Cycle Tourism Strategy*, a feasibility study for a cyclists' crossing of River Weaver and proposals for the Wirral Waterside and Mersey Waterfront Ways
- e. **range of potential funding sources** - a wide range of funding sources are potentially available for Trail development, maintenance and marketing, including local transport plan and rights of way improvement plan funding, rural recovery programmes and Mersey Waterfront funding
- f. **potential for voluntary support** - several regional and local user organisations have expressed support for the Trail concept and their members may provide practical support as voluntary rangers, etc..

5.2.3 Conversely, there are several **apparent weaknesses and potential threats** associated with the involvement and activities of potential partner organisations and their joint working, which outweigh the apparent strengths and opportunities. These will need to be resolved, or new management structures and arrangements developed, to enable effective Trail development and management. Weaknesses and threats identified during the *Concept Feasibility Study* and this further work include -

- a. **lack of a dedicated lead body with corporate powers and staff capabilities** - so far the North West Coastal Forum has acted as *de facto* lead body for the proposed Trail, with support from the Government Office for the North West (up to 2003) and the North West Regional Assembly (2003 onwards). The Coastal Forum is not a corporate body, lacks the necessary funding arrangements to lead the development of the Trail and has only one staff member (employed by NWRA.). Options for future management structures and operational arrangements are discussed below
- b. **varying levels of support and uncertain commitments to Trail development and investment from potential key partner organisations** - while some regional agencies, local authorities and other organisations have provided consistent support at the 'political' and staff levels, the support of others has been less certain. The proposed Trail does not feature in most key policy documents (e.g. development plans, local transport plans) or corporate investment programmes

- c. uncertainties and potential delays arising from re-organisations of tourism functions and local government** - the imminent reorganisation of tourism responsibilities (i.e. NWDA becoming strategic tourism agency, supported by DMOs) and potential replacement of the county and district councils by unitary authorities, could result in delays in development and investment programmes and uncertainties over future support for the Trail
- d. likely delays in securing funding and progress on the Trail** - until spending requirements are clearer, potential partner organisations are unlikely to commit funds to developing and enhancing the Trail and associated facilities and services. As yet, there are no funding commitments for the preparatory strategies outlined in this report and substantive funding for these is unlikely to be available until 2005/6, or later. Even after the scale of investment requirements is known from the preparatory investigations and strategies, there will be a need to prepare, submit and negotiate strategic and partner funding bids. This process will incur further delays
- e. problems of maintaining the impetus, interest and support of 'key players'** - largely as a result of the above issues, there is potential for a loss of impetus and 'fatigue' amongst key organisations and individuals
- f. issues arising from agency arrangements for local authority functions** - the out-sourcing of local authority services, and recharging of client departments/services for work undertaken by other departments/services, can impose difficulties for Trail development and maintenance. For example, surveys and other works undertaken by Capita - as agent for Cumbria County Council - on public rights of way sections of the proposed Trail will be charged at commercial rates, have to be taken from a limited budget and may be at the expense of other highways work, which may be seen as having higher priority. Cumbria County Council, itself, may have very limited in-house staff to lead the development of the Coastal Trail in Cumbria
- g. problems of sustaining investment, especially in Trail maintenance** - whereas funding may be more readily available from public sector capital budgets and strategic funding sources (e.g. EU, Lottery and Rural Recovery Programme funds), there may be difficulties in securing revenue funding to sustain route maintenance and associated facilities and services
- h. variations in standards of route and associated services** - there are substantial variations in the standards of basic walking, cycling and other user provision (e.g. quality of surfaces, accessibility, signing) on existing sections of the Trail. There will be a need to agree minimum/desirable standards, which will vary between characteristic sections of the route (e.g. urban areas, remoter rural areas), and to bring the route up to these standards. This will be more difficult in more remote areas, where the route may be less well-developed, and over sensitive sites, or where access has not been secured, through public rights of way procedures, agreements, etc.. Action and investments by local authorities will be required to achieve at least these minimum standards prior to the promotion of the Trail.

5.2.4 The previous assessments and considerations highlight the need for an effective, strong and well-resourced management structure to progress the Trail proposals. These requirements are discussed in more detail in the following text.



### 5.3 Requirements, Tasks and Capabilities for Trail Development and Management

#### Key requirements for effective Trail development and management

- 5.3.1 The *Concept Feasibility Study* highlighted several vital requirements to enable progress on the effective development and management of the Coastal Trail and discussed how these may be satisfied. In summary, it identified the requirements as -
- a. **clearly defined statement of aims and objectives (or mission statement)** - the *Feasibility Study* recommended that ... *this should focus on the Trail* -
    - *encompassing all of the North West's coast - from Chester to Carlisle and connecting to other regional and national walking and cycling trails*
    - *offering opportunities for longer-distance, multi-day and day/part-day walking, cycling and, where feasible, riding and all abilities use, and with good public transport links to, and between sections of, the Trail*
    - *contributing to the amenities, health, sustainable travel opportunities and social and economic welfare of the North West's communities*
    - *encouraging sustainable recreation, enjoyment and appreciation of the coast's landscapes, settlements and natural and cultural heritage by the North West's residents, day visitors and tourists*
    - *benefiting from coordinated, effective and well-funded Trail development, management and marketing arrangements.*
  - b. **agreed and appropriate status for the Trail** - it recommended that the Trail be developed as a regional trail, with sections meeting the standards and promoted as National Cycle Network regional routes. The *Feasibility Study* recognised that the Trail would provide a regionally significant recreational and regional park resource - providing access to, through and linking the several regional park projects proposed for the North West (e.g. Mersey Waterfront Park, Ribble Estuary Regional Park)
  - c. **strong descriptive identity for the Trail** - the *Feasibility Study* recommended *North West Coast Discovery Trail* as a working title for the Trail, but suggested that a shorter title, logo and 'strap-line' be developed to convey and support the Trail's identity, marketing and signing. This report (s. 3) recommends the preparation of communications and marketing strategies, including the development of a distinctive brand for the Coastal Trail
  - d. **effective preliminary planning, development strategy and action programme for establishing, managing and marketing the Trail** - experience of developing the Trans Pennine Trail has shown that greater initial effort to agree standards and undertake an initial, comprehensive engineering study, rather than relying on the individual authorities to assess development requirements, may have prevented unnecessary delays and ensured more consistent standards. The preparatory investigations and strategies recommended in section 3 of this report will provide the information, proposals and programmes from which an integrated development strategy and action programme can be developed
  - e. **sustained commitment of key partners** - many potential partner organisations support the principle of the Coastal Trail. However, their commitment to support and fund the preparatory investigations and strategies and suggested management structures recommended in this report (following any agreed amendments) will be vital to enable progress towards developing the Trail
  - f. **need for Trail champions and commitments from key decision-makers** - the Coastal Trail concept has progressed to its current stage through the efforts of a few champions of the concept. A wider range of champions, including senior elected members and executives in the lead agencies and authorities will be essential to 'drive' progress on the Trail's development and 'fight' for the necessary resources at the corporate, regional and national levels

- g. adequate and sustained funding commitments will be crucial** - the Coastal Trail is an ambitious project and will require substantial capital and revenue funding. Over £20m has been spent on developing and marketing the Trans Pennine Trail and £6m on Hadrian's Wall Path, with further funding programmes for the latter 'in the pipeline'. Funding requirements for the Coastal Trail will become clearer following the initial investigations and strategies (section 3) and the Trail will benefit from having well-established sections of route already in place.

Hadrian's Wall Path has benefited from being a national trail and, thereby, eligible for Countryside Agency funding (up to 100% for surveys, route creation and project staff) and maintenance (up to 75%) and from Heritage Lottery Fund support. Millennium Commission funding was critical to the establishment of the Trans Pennine Trail. Such funding is unlikely to be available to the proposed Coastal Trail; although, sections may be eligible for HLF support.

Coastal Trail development is likely to depend on support from, for example, regional park, rural recovery and local transport plan programmes. Additionally, on-going revenue funding will be required for Trail maintenance and marketing

The Funding Strategy recommend in section 3 will enable exploration of funding sources and development of strategic approach to the generation of funds for the Trail and associated programmes. Importantly, the recommended Market and Economic Impact Assessment will put the investment requirements in perspective against the potential economic benefits these may achieve

- h. partnership organisation to coordinate, lead and contribute to funding the development, management and marketing of the Trail** - the *Concept Feasibility Study* discussed options for a Trail management organisation and recommended the establishment of a North West Coast Discovery Trail Partnership. Management arrangements are discussed and developed more fully below. The nature of the partnership is crucial, as experience from the Trans Pennine Trail shows that, where it is a 'loose' partnership, overall progress proceeds at the pace of the slowest and least committed partner organisations
- i. involving a wider range of interested parties** - a Trail Liaison Group was recommended in the Feasibility Study. Options and recommendations for liaison and involving a wide range of organisations and interest groups are set out below. Efforts to engage Trail users, user groups and communities can be time consuming, but may generate 'ownership' and care for the Trail, as illustrated by the Friends of the Pennine Trail, who provide a range of support (e.g. surveys, practical maintenance, promoting the Trail) and 70 volunteers act as Trail Stewards
- j. Trail Officer and Trail Management Unit** - the appointment of a Trail Officer and establishment of a small Trail coordination unit are essential to coordinate and facilitate Trail development, management and marketing. An adequate commitment to staffing is required, as experience with Hadrian's Wall Path, the Trans Pennine Trail and other UK trails indicates that the efforts required to service partner organisations, develop and implement Trail-related programmes, secure and manage funding, respond to enquiries, coordinate volunteers, etc. can overstretch a single Trail Officer, or an inadequately resourced Trail management team.

#### **Tasks associated with developing, managing and marketing the proposed Trail**

- 5.3.2 The tasks illustrated in Figure 5.1 highlight the extent of work required to be undertaken to develop, manage and market the proposed Trail and the need for an effective management structure and dedicated staff capability.

### Principal capabilities required by the Trail management body

5.3.3 To enable the Trail management body to ‘deliver’ the above tasks will require a range of in-house capabilities, or access to these through partner organisations or the purchase of commercial services. Key capabilities will include -

- a. **corporate capabilities** - including the powers to negotiate and enter contracts for services and supplies, enter access or management agreements, acquire or lease land, property or wayleaves, acquire, hold and disperse funds, employ and manage staff, and prepare and review business plans
- b. **professional capabilities** - including walking, cycling and multi-use route planning, design, development and maintenance, landscape design and implementation, information and interpretive planning, design and implementation, market research and marketing, community facilitation, fund-raising and ranger service provision
- c. **administrative support** - for example, servicing the management body and staff, organising and recording meetings, handling enquiries and complaints, and providing administrative and financial services.

**Figure 5.1 Illustrative Trail Development, Management and Marketing Tasks**

Stage of Trail Development	Key Tasks (not comprehensive list)
<b>Pre-Development</b>	<ul style="list-style-type: none"> <li>• agreeing briefs, commissioning and supervising preliminary investigations &amp; strategies</li> <li>• collating investigations and strategies in a development strategy and action plan</li> <li>• establishing a Trail management body and consultative groups and appointing core staff</li> <li>• preparing and progressing strategic funding bids and negotiating partner funding</li> <li>• undertaking baseline survey of users and users’ aspirations and satisfaction</li> <li>• progressing early action Trail development projects</li> <li>• liaising with partner organisations, landowners, community/user groups and wider interests</li> </ul>
<b>Development</b>	<ul style="list-style-type: none"> <li>• negotiating agreements, establishing PROW status, etc., where access is uncertain</li> <li>• designing and coordinating Trail development, enhancement, upgrading and greening</li> <li>• encouraging the provision/enhancement of amenities, facilities and services for Trail users</li> <li>• developing marketing and information materials, Trail guide, etc.</li> <li>• preparing and progressing strategic and partner funding bids</li> <li>• servicing the Trail management body, consultative groups, etc.</li> <li>• establishing, organising and training volunteer support group(s)</li> <li>• liaising with partner organisations, landowners, community/user groups and wider interests</li> </ul>
<b>On-Going Trail Management &amp; Marketing</b>	<ul style="list-style-type: none"> <li>• condition surveys, risk assessments, user surveys and other monitoring</li> <li>• maintaining the Trail and further developing and up-grading the route and facilities</li> <li>• providing a Trail information service and maintaining the Trail Website, publications, etc.</li> <li>• undertaking tourism product, market development, social inclusion &amp; other programmes</li> <li>• organising Trail events, media publicity, etc.</li> <li>• providing Trail management and ranger service (directly, or coordinating others)</li> <li>• securing funding and keeping the strategy and action programme under review</li> <li>• servicing the Trail management body &amp; consultative groups, servicing volunteer groups, etc.</li> </ul>

### 5.4 Recommendations for a Trail Management Organisation

5.4.1 The *Concept Feasibility Study* briefly discussed options for an organisational structure to develop and manage the Coastal Trail. These options have been further developed and refined, and discussed with representatives of potential partner organisations. A summary of the options is presented in Figure 5.2 (overleaf). These are -

- a. **single management agent**
- b. **informal partnership**
- c. **formal partnership**
- d. **local authorities’ joint committee**
- e. **not-for-profit company limited by guarantee.**

**Figure 5.2 Illustrative Options for Organisational Structure for Developing and Managing the Proposed Trail**

Organisational Option	Examples (other contexts)	Constitution and Powers	Potential Strengths (+) and Weaknesses (-)	Potential Outcomes
<b>Single Management Agent</b>	<ul style="list-style-type: none"> <li>• Sustrans</li> <li>• NWDA</li> </ul>	<ul style="list-style-type: none"> <li>• organisation takes responsibility for coordinating implementation of Trail</li> <li>• <i>ad hoc</i> liaison with other organisations or liaison group</li> </ul>	<ul style="list-style-type: none"> <li>+ single minded team responsible for Trail</li> <li>+ potential support from local organisations</li> <li>- other bodies (e.g. highway authorities) retain statutory duties for rights of way, etc.</li> <li>- lack of wider 'ownership' &amp; accountability</li> <li>- dependent on cooperation of l.a.s, etc.; not directly involved</li> <li>- not eligible for some strategic/other funds</li> <li>- reliance on continuing support from lead body</li> </ul>	<ul style="list-style-type: none"> <li>o unlikely for one organisation to take full responsibilities and maintain long- term interest</li> <li>o high risks of failure due to lack of wider 'ownership' and limited involvement</li> <li>o no 'grass routes' support</li> <li>o friction between lead body and other organisations</li> </ul>
<b>Informal Partnership</b>	<ul style="list-style-type: none"> <li>• NW Coastal Forum</li> </ul>	<ul style="list-style-type: none"> <li>• informal agreement</li> <li>• no corporate body or powers</li> <li>• no fund holding capability</li> </ul>	<ul style="list-style-type: none"> <li>+ joint approaches to Trail development, etc.</li> <li>+ potential for wide range of partners</li> <li>- no corporate powers; reliant on partners for funds/actions</li> <li>- limited/no ability to attract strategic funding</li> <li>- no ties; insecure - partners' commitment may evaporate</li> <li>- limited accountability</li> </ul>	<ul style="list-style-type: none"> <li>o low cost option</li> <li>o initial scope for broad partnership</li> <li>o high risks of failure, due to limited capabilities</li> <li>o works at pace of weakest/least committed partner</li> <li>o loss of commitment, support and credibility</li> <li>o at best - may restructure as corporate body (below)</li> </ul>
<b>Partnership Agreement (+/- charitable status)</b>	<ul style="list-style-type: none"> <li>• NW Coastal Forum (potential status)</li> <li>• Arnsdale &amp; Silverdale AONB Unit</li> <li>• Mersey Waterfront</li> </ul>	<ul style="list-style-type: none"> <li>• constitution/ membership rules</li> <li>• corporate body and powers</li> <li>• unlimited liability of members</li> <li>• potential for charitable status</li> <li>• fiscal advantages of charitable status</li> </ul>	<ul style="list-style-type: none"> <li>+ partnership dedicated to progressing Trail</li> <li>+ joint approaches to Trail development, etc.</li> <li>+ potential for corporate powers and capabilities</li> <li>+ potential for range of partners, but retaining l.a. 'ownership'</li> <li>- issues of members' potential liabilities</li> <li>- reliant on partners' funds and support</li> <li>- partners' interests may come before Trail</li> <li>- not eligible for some external funds</li> <li>- accountability depends on constitution/ethos</li> </ul>	<ul style="list-style-type: none"> <li>o medium cost option</li> <li>o potential for broad partnership &amp; community support</li> <li>o risks of partnership not tackling bigger projects due to members' unlimited liabilities</li> <li>o may be viewed as public sector dominated body</li> </ul>
<b>Local Authorities' Joint Committee</b>	<ul style="list-style-type: none"> <li>• Pentland Hills Regional Park (Scotland)</li> </ul>	<ul style="list-style-type: none"> <li>• formal agreement between l.a.s to form joint committee</li> <li>• established under local govt. legislation</li> <li>• may have delegated powers</li> <li>• scope for user representatives, etc. (non-voting)</li> </ul>	<ul style="list-style-type: none"> <li>+ Committee dedicated to progressing Trail</li> <li>+ corporate capabilities of partner authorities</li> <li>+ potential for range of partners, but retaining l.a. 'ownership'</li> <li>+ accountability through local authorities</li> <li>- non-elected members do not have voting rights</li> <li>- viewed as creature of local government</li> <li>- reliant on agreement of each local authority</li> <li>- not eligible for some external funds</li> </ul>	<ul style="list-style-type: none"> <li>o medium cost option</li> <li>o potential for broad partnership &amp; community support</li> <li>o potential to achieve objectives, if adequate support</li> <li>o may be viewed as public sector dominated body</li> <li>o may be constrained by bureaucracy + pace of slowest member authority</li> </ul>
<b>Not-for-Profit Company (limited by guarantee +/- charitable status)</b>	<ul style="list-style-type: none"> <li>• Sustrans</li> <li>• Groundwork Trusts</li> <li>• Mersey Partnership</li> </ul>	<ul style="list-style-type: none"> <li>• memorandum &amp; articles of agreement</li> <li>• corporate body and powers</li> <li>• accountable through company legislation</li> <li>• potential for charitable status</li> <li>• members have limited liabilities</li> <li>• fiscal advantages of charitable status</li> </ul>	<ul style="list-style-type: none"> <li>+ organisation dedicated to progressing Trail</li> <li>+ Directors have equal status</li> <li>+ wide range of powers and capabilities</li> <li>+ access to wide range of funds (esp. if charity)</li> <li>+ dynamic of independent status</li> <li>+ accountability thro' company/charitable status</li> <li>- partners may pass responsibilities to company and opt out</li> <li>- dependent on partners' on-going support</li> <li>- expectations may exceed capabilities</li> <li>- need to ensure accountability</li> </ul>	<ul style="list-style-type: none"> <li>o potentially higher cost option</li> <li>o potential for broad partnership &amp; community support</li> <li>o potential to achieve objectives, if adequate support</li> <li>o potential to give higher profile to Trail</li> <li>o scope to undertake wider range of initiatives</li> </ul>

Note: corporate powers include ability to hold and manage funds, buy, lease and hold land, enter contracts and employ staff

Brief consideration was given to a **limited liability partnership**, but this proved a 'non-starter', as it is only available to partnerships, which are intended to be profit-making.

5.4.2 Discussions with the Coastal Trail Steering Group (January 2004) resulted in agreement that three of the above options were not worth further consideration, primarily for the reasons outlined below -

- a. **single management agent** - there is no obvious candidate organisation to take sole responsibilities for progressing the development and marketing of the Trail. Also, this approach would be contrary to the principles of partnership working and engagement with a wide range of interests, which are considered vital to successful Trail development and management
- b. **informal partnership** - a 'loose' partnership, of many agencies, authorities, implementation bodies and other interests, which lacks a corporate entity and powers and relies on partner organisations providing support in a voluntary and *ad hoc* manner, is unlikely to achieve or maintain the impetus, resource base or standards sought for the proposed Trail. The partnership basis for such an arrangement would be extremely weak, resulting in the likelihood of key partners failing to deliver agreed programmes. Also, members or staff of such a partnership could be personally liable for any financial or legal claims against the partnership
- c. **local authorities' joint committee** - while providing the strength of the powers of the member authorities and having scope to include members representing wider interests, the latter members would not have voting rights. This structure is likely to be viewed as a 'creature' of the local authorities, rather than portraying wider partnership and engagement principles. Given its public sector 'domination', such a body may be ineligible for some types of funding (e.g. charitable funds).

5.4.3 The focus for further assessments of the organisational options is, therefore, -

**c. formal partnership :**

- i. **constitution** - this option would require partner organisations to enter a legal **partnership agreement**, including a constitution and membership rules, which would provide a framework for joint working, including arrangements for partnership governance, resourcing, performance reviews and accountability. The partnership agreement would create a corporate body, which could enter contracts, own or lease land, hold funds and undertake other corporate functions. As an 'arms-length organisation, it could develop an identity directly associated with the Coastal Trail and its management. The agreement may include provisions for a lead authority(ies) to provide legal, financial, administrative and personnel services and employ staff.

Member organisations and their representatives would have unlimited liabilities for any debts or claims against themselves or the partnership, in connection with decisions or actions by the partnership. This may deter key decisions and actions and make the partnership risk-averse.

- ii. **capabilities** - due to the liability issues outlined above, the delivery of most projects and programme is likely to have to be undertaken by one or more partner organisations, or a lead organisation, acting on behalf of the partnership. For similar reasons, any staff are likely to be employed by a host authority, rather than the partnership. In the latter case, such staff would be able to work within the parameters (e.g. delegated expenditure limits) set out in the partnership agreement

- iii. **potential benefits** - this structure can provide an open and accountable partnership, which can attract wide representation. The partnership agreement can focus attention on the key objectives and give the partnership specific decision-making and implementation roles. It may be eligible to become an unincorporated charity, with associated fiscal benefits
  - iv. **potential weaknesses** - reliance on partner organisations to deliver projects and programmes and provide key services on behalf of the partnership will put burdens on these organisations and their staff - especially, those local authorities with lengthy sections of the Trail within their areas. Trail development is likely to progress at the pace of the slower, less committed partners
  - v. **cost implications** - the principal costs will be associated with servicing the partnership and employing its staff. The costs associated with establishing the partnership will be only slightly less than those of establishing a company, and the partnership agreement may be drawn up by legal staff of a partner authority. Where contracts are managed by a partner local authority, that authority can normally reclaim the VAT element of costs of supplies and services
  - vi. **initial support** - informally, staff of most of the potential partner organisations indicated that, at least in the initial stages of Trail development, their organisations may favour the partnership option and it may be premature to establish a company (see below), before the capabilities and *modus operandi* of the partnership are tested. Many elected members are likely to favour the partnership option, as control will remain largely with the lead authorities.
- d. **not-for-profit company, limited by guarantee :**
- i. **constitution** - this is the most common form of delivery organisation for multi-sector development and environmental projects. The company's **memorandum and articles of association** will set out its objectives, purposes, rules and corporate powers. Directors of a company limited by guarantee will have only nominal liabilities for any debts incurred by, or claims against, the company. The directors will be required to pursue the company's objectives, rather than those of the partner organisations - giving the company greater independence to progress the interests of the Trail. The company will be subject to company law and required to submit an annual report and accounts and hold an AGM
  - ii. **capabilities** - subject to the conditions and powers in its memorandum and articles, the company will have a range of corporate capabilities
  - iii. **potential benefits** - a company can provide a publicly accountable, business-like structure and *modus operandi*. Its identity and focus would relate directly to the Coastal Trail. As it would have a degree of independence from its partner organisations and corporate powers, it would be able to adopt a more dynamic and pro-active approach to Trail development and work towards agreed programmes, without having to rely on the agreement of, and possible actions by, individual partners. Also, it is likely that a non-public sector organisation, - albeit with members representing public sector interests, possibly with charitable status, may find it easier to attract community, voluntary and business funding and practical support.
  - iv. **potential weaknesses** - due to its perceived independence, the company may find it more difficult to draw on technical, administrative or other support from its partner organisations and may be charged for support and services (e.g. payroll services, accommodation for meetings)

- v. **cost implications** - depending on how the costs of establishing and servicing a company are allocated (e.g. whether servicing, administration, accommodation and professional services costs are attributed to the company, or some are 'absorbed' by partner organisations), the costs of establishing and running the company are not likely to be substantial and will relate largely to the one-off legal costs of drawing up the memorandum and articles of agreement, company registration (nominal cost) and annual auditing costs. Importantly, a company will be subject to VAT on purchases of goods and services. This will impose additional costs over those of a partnership, unless the company enters arrangements whereby major contracts are let through partner organisations
- vi. **initial support** - as indicated above, elected members of some local authorities may be wary of establishing an arms-length company for Trail development and related functions. Conversely, representatives of one major local authority, with experience of service delivery through contractual arrangements, indicated that their members may favour such an arrangement.

#### **Potential benefits of charitable status**

- 5.4.4 Depending on its objectives and purposes, either a formal partnership or a not-for-profit company may seek charitable status. This may -
- help to attract funding from other charities, business sponsorships, etc.
  - encourage support from voluntary organisations, communities and individuals
  - enable the management body to reclaim tax contributions associated with Gift Aid donations or covenants
  - provide fiscal benefits, such as rates relief on premises.

Charitable status will require the applicant body to satisfy the requirements of the Charity Commissioners and to appoint Trustees.

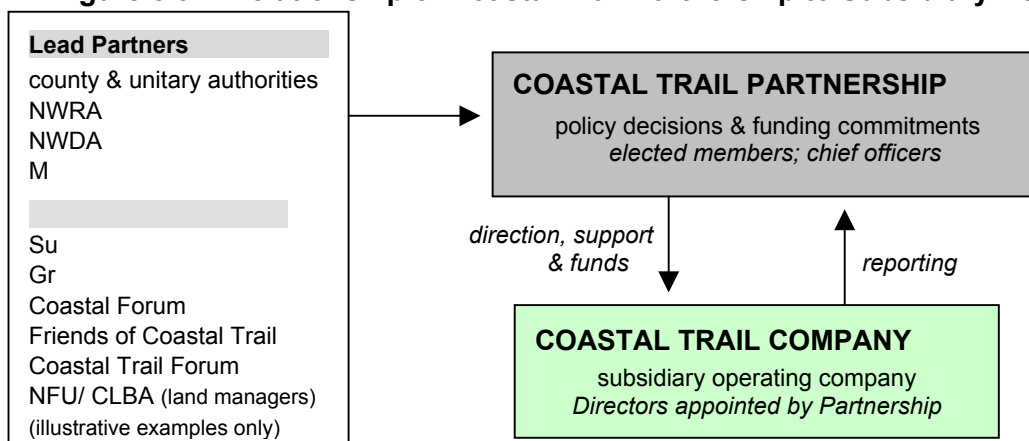
#### **Recommended Trail development and management organisation**

- 5.4.5 On the basis of the above considerations, ***it is recommended (R) that*** -
- R1. *Partner organisations should establish a NORTH WEST COASTAL TRAIL PARTNERSHIP, through a formal partnership agreement, which sets out the basis for joint working to develop, manage and market the proposed North West Coast Discovery Trail***
  - R2. *The partnership agreement to establish the Trail Partnership should provide scope for establishing the NORTH WEST COASTAL TRAIL COMPANY, as a subsidiary, not-for-profit company to deliver Trail-related projects and programmes, where the fiscal and legal benefits of a company limited by guarantee may be advantageous, and to employ the proposed Trail Officer and Trail Coordination Team***
  - R3. *The proposed Partnership should review its status after the first three years of its operation, with a view to considering whether company status may prove advantageous to its operations.*** By this stage, the development of the Trail will need major investments in infrastructure development and related programmes and company status may be beneficial
  - R4. *The Partnership should seek charitable status as a means of attracting financial and practical support (e.g. volunteering).***

### Relationship between the proposed Trail Partnership and Trail Company

- 5.4.6 The proposed **North West Coastal Trail Partnership** (a., above) would be the lead decision-making body for Coastal Trail. Its Management Board may comprise representatives of the principal funding and implementation organisations (Figure 5.3) and a small number of representatives of Trail users and wider community interests. The Management Board may meet 2 to 4 times/year and would operate in accordance with the partnership agreement. Its members would be expected to champion the Trail and to seek/secure the support and funding commitments of the partner organisations, in addition to taking strategic decisions and providing guidance on Trail-related policies and programmes. Its members would advise and support the Trail Officer and Team.
- 5.4.7 The **North West Coastal Trail Company** would be a subsidiary of, and report to, the Trail Partnership. For efficiency, its Board may comprise around 5 Directors and a Chairperson appointed by the Partnership. The Board may meet every 2 - 4 months, but *ad hoc* groups of Directors and Advisers (i.e. technical officers) may meet separately (e.g. financial management group, projects group). The Company would be responsible for letting and managing contracts, insofar as agreed by the Partnership, and may earn income through providing services (e.g. maintaining rights of way on contract), merchandising (e.g. publication sales) and running guided walks programmes and events.

**Figure 5.3 Relationship of Coastal Trail Partnership to Subsidiary Company**



### Regional and sub-regional approach to Trail development and management

- 5.4.8 The length of the proposed Trail, and the multitude of organisations with current or potential responsibilities and/or interests in its development, management and marketing, may pose difficult logistical issues and leave some partner organisations and interest groups feeling remote. To overcome such issues, it is suggested that - rather than seeking to coordinate all works, programmes and liaison from a single base, which may be physically distant and perceptually remote from partner organisations, communities and users at more distant sections of the Trail - efficiency and 'political' benefits may arise from the adoption of a two-tier approach to Trail management. This would involve -
- **regional coordination** - with the Trail Partnership and aspects of strategic direction, programme coordination, fund-raising and stakeholder liaison functioning at a Trail-wide level
  - **sub-regional coordination** - with the Trail divided into two operational areas for day-to-day Trail development, management and related programmes, but under the overall control, guidance and support of the Partnership and Trail Officer.



5.4.9 Following the above assessments and discussions with staff of key partner organisations, **it is recommended that -**

**R5. In addition to adopting a coordinated approach to Trail development, management and marketing at a Trail-wide level, and for reasons of logistics, efficiency and effectiveness, the proposed Trail should be divided into 2 sections for operational purposes -**

- **South: Chester to mid-Lancashire**
- **North: mid-Lancashire to Carlisle.**

This regional and sub-regional approach to Trail development and associated programmes will influence how the management structure for the Trail may be developed, as illustrated below.

#### **Key components of the Trail management structure**

5.4.10 While the proposed Trail Partnership will take the strategic decisions and lead development of the Trail, experience of similar projects shows the value of supporting Trail development and management through -

- |                                     |                                 |
|-------------------------------------|---------------------------------|
| <b>a. officer steering group(s)</b> | <b>c. consultative forum(s)</b> |
| <b>b. Trail coordination team</b>   | <b>d. Friends group.</b>        |

The roles and organisation of these elements of the proposed management structure are outlined below and Figure 5.3 illustrates how they relate to each other.

#### **a. officer steering group(s)**

5.4.11 Technical officers of the lead partner organisations will play key roles in -

- advising the Trail Partnership and Trail Officer and Coordination Team
- developing policies, projects and action programmes
- ensuring that partner organisations undertake projects and programmes on time and to budget and high standards and deliver agreed funding
- preparing and monitoring budgets and helping to secure external funding
- representing the Partnership and Trail in parent organisations and other forums.

5.4.12 **It is recommended that -**

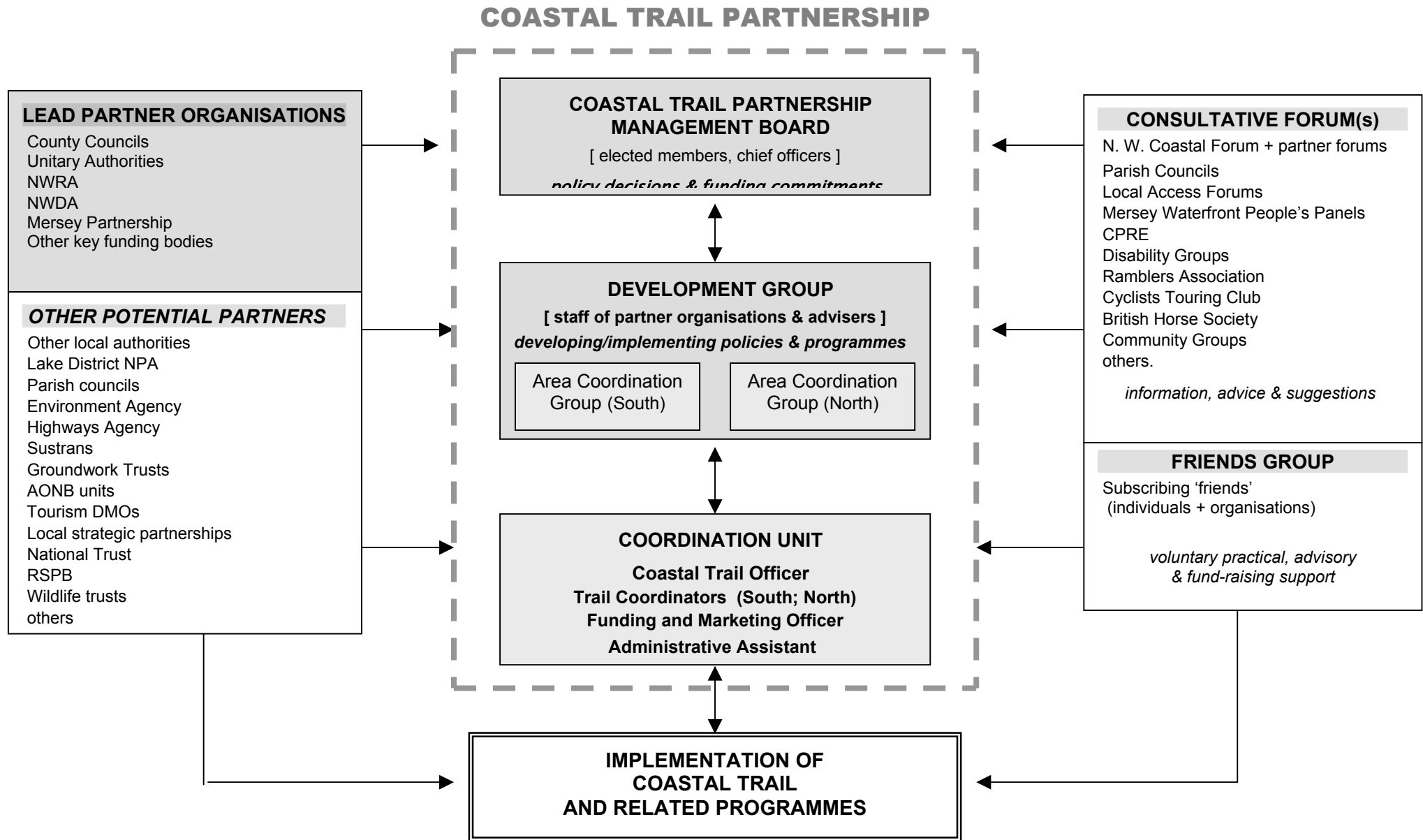
**R6. A COASTAL TRAIL DEVELOPMENT GROUP should be established to provide technical advice and support to the Trail Partnership, Trail Officer and Coordination Team and to guide and oversee operational aspects of Trail development, management, marketing and associated programmes.**

This Group should be small in size to ensure effectiveness and efficiency and comprise senior officers of key partner authorities and funding agencies, including a representative of each Area Coordination Group.

**R7. AREA COORDINATION GROUPS should be established for the two operational areas, to provide technical advice and support to the Trail Officer and respective Trail Coordinator, and to ensure partnership cooperation and funding and progress on Trail development, management, marketing and associated programmes.**

The Area Coordination Groups could bring together a wider range of organisations with implementation and representative roles; for example, representatives of each local authority, funding partners, tourism DMOs, Sustrans, Groundwork, AONB management units, Friends Groups and local access forums.

**Figure 5.4 North West Coastal Trail - Potential Partnership Structure**



**b. Trail coordination team**

5.4.13 While staff of partner organisations, their agents and others will be expected to undertake much of the day-to-day development and maintenance tasks, the scale of the Trail and the many organisations and interests involved, will pose significant coordination tasks. For this reason, and following experience from other Trails, *it is recommended that -*

**R8. A COASTAL TRAIL COORDINATION UNIT should be established to support the Trail Partnership and to ‘drive’ Trail development, management, marketing and associated programmes. This Coordination Unit should comprise -**

- **Coastal Trail Officer**
- **2 Trail Coordinators (South, North)**
- **Funding and Marketing Officer**
- **Administrative Assistant.**

5.4.14 The potential roles of these staff are illustrated in Figure 5.5. It is suggested that the recommended staffing should be reviewed after the initial 3 year period to assess the effectiveness of the Coordination Unit and identify any changes required in staff skills and capabilities. In addition to the staff shown below, additional programme staff may be employed to develop and deliver specific programmes (e.g. Community Involvement Officer with NOF funding).

**Figure 5.5 Trail Coordination Staff - Principal Roles and Tasks**

<b>Staff</b>	<b>Main Roles and Tasks</b>
<b>Coastal Trail Officer</b>	<ul style="list-style-type: none"> <li>• Secretary, lead officer and adviser to Partnership and Company</li> <li>• manager of Coordination Unit</li> <li>• progressing development, management and marketing of Trail</li> <li>• business, financial and programme planning and management</li> <li>• liaising with partner organisations, funders, user/community groups, etc.</li> <li>• promoting development of Consultative Forum and Friends Group</li> <li>• champion for Trail and media and public relations</li> </ul>
<b>2 Trail Coordinators (South, North)</b>	<ul style="list-style-type: none"> <li>• coordinating and progressing development, management and marketing of Trail and associated programmes in each operational area</li> <li>• project and programme planning, management and reviews</li> <li>• coordinating condition, risk and user surveys, etc.</li> <li>• liaising with partner organisations, funders, user/community groups, etc.</li> <li>• establishing and encouraging development of area consultative groups, Friends Group and volunteer programmes</li> <li>• champion for Trail and media and public relations at area level</li> </ul>
<b>Funding &amp; Marketing Officer</b>	<ul style="list-style-type: none"> <li>• developing and progressing strategic and programme funding bids</li> <li>• securing funding contributions from partner organisations and funders</li> <li>• exploring and developing income streams, insofar as practical.</li> <li>• promoting market awareness of Trail, including through media</li> <li>• liaising with DMOs, partner organisations and other to promote awareness of Trail and encourage development of Trail product and user services</li> <li>• developing and coordinating information and interpretive provision, including publications and Website</li> </ul>
<b>Administrative Assistant</b>	<ul style="list-style-type: none"> <li>• providing administrative and financial management support</li> <li>• servicing Partnership, Company, Coordination Unit and other groups</li> <li>• support for programmes (e.g. maintaining Website, feedback service)</li> </ul>

**c. consultative forum(s)**

- 5.4.15 In keeping with the ethos of creating a representative management structure, there will be a need for a mechanism(s) through which Trail user groups, communities and other organisations and interests can contribute suggestions, advice and information on Trail development and associated programmes and gain feed-back on progress. ***It is recommended that -***

***R9. A COASTAL TRAIL CONSULTATIVE FORUM (or area consultative forums) should be formed, as a means whereby interest groups can be consulted and provide information, advice and suggestions on Trail development and related matters.*** This Forum, or area forums, may meet once or twice a year.

At a more local level, the existing Local Access Forums may provide views and suggestions on the development and management of the Coastal Trail.

**d. Friends groups**

- 5.4.16 Experience of other trails and countryside initiatives (e.g. AONBs) shows that Friends groups can provide substantial support, for instance, by -
- preparing and keeping up-to-date Trail publications, such as accommodation guides and Trail guidebooks
  - running a visitor centre and information service (e.g. Offa's Dyke Association)
  - raising funds and providing practical assistance (e.g. voluntary lengthsman)
  - organising events and guided walks, cycle rides, etc..
  - helping to create a high profile for the Trail.

Consequently, ***it is recommended that -***

***R10. The Trail Partnership should encourage and support the formation of an independent NORTH WEST COASTAL TRAIL FRIENDS GROUP to mobilise potential supporters of the Trail and encourage their active involvement in aspects of its development, management and marketing.***

**5.5 Costs of Establishing and Operating the Management Structure**

- 5.5.1 The consultants' brief sought an indication of the potential costs of the Trail management structure. The following costs are indicative, order of magnitude estimates based on 2003/4 salary scales (2004/5 scales were not available). The estimates in Figure 5.6 exclude capital and other costs of Trail development and associated programmes. The costs shown below may be substantially reduced, if one or more partner organisations second staff and/or provide accommodation and services at no/reduced cost, as contributions in kind.

- 5.5.2 In addition to the running costs, there will be costs of recruiting staff and establishing the Trail Coordination Team. Estimated establishment costs are shown in Figure 5.7. These costs may be reduced, if partners provide services as contributions in kind.

**Figure 5.6 Indicative Running Costs of the Proposed Management Structure**

<b>Cost Category</b>	<b>Main Components</b>	<b>Costs (£k/year)</b>
<b>Staff</b>	Coastal Trail Officer (PO3)	30*
	2 Trail Coordinators (SO1/2)	55*
	Funding & Marketing Officer (SO1/2)	28*
	Administrative Assistant (SCP4)	18*
<b>Admin. Costs</b>	Accom., office services and supplies, T&S, training, etc. (@ 33-40% of salary)	43-52
<b>Partnership, Forum, Insurances, Publications etc.</b>	Servicing Partnership and Consultative Forum, accommodation for meetings, visits, insurances, etc.. (e.g. Partnership publications)	8-12
<b>Professional &amp; support services</b>	legal, accountancy, payroll and technical support services (e.g. IT support and licences)	8-12
<b>Total Annual Costs</b>		<b>£ 190k - 207k</b>

\* Salaries include 19.5% allowance for Nat. Ins., superannuation, etc.. Estimates based on 2003 costs.  
Costs may be reduced if partner organisations provide support services at no/low cost.

**Figure 5.7 Indicative Establishment Costs of the Proposed Management Structure**

<b>Cost Category</b>	<b>Main Components</b>	<b>Costs (£k)</b>
<b>Partnership &amp; Staff</b>	Partnership members induction, visits, etc.	8-12
	Staff recruitment & induction (some staff may be seconded)	
<b>Equipment Costs</b>	Office, IT, presentation & communications equipment, software licences, initial stationery supplies, initial print (e.g. Partnership & Trail explanatory leaflets) (some equipment may be provided by partner organisations, as support in kind) Staff protective clothing and basic field equipment	36-42
<b>Professional &amp; support services</b>	Initial legal/accountancy advice, company registration, etc Technical support services (e.g. IT support and licences)	8-12
<b>Total Establishment Costs - Total</b>		<b>£ 52k - 66k</b>

Costs may be reduced if partner organisations provide support services at no/low cost.



## **Appendix A**

### **HADRIAN'S WALL PATH NATIONAL TRAIL - BACKGROUND & TRAIL DEVELOPMENT**

#### **Hadrian's Wall Path National Trail**

Hadrian's Wall Path (HWP) is a 135km (84 mile) path that shadows the historic line of Hadrian's Wall between Wallsend, in the east, and Bowness-on-Solway, on the west coast. This 13<sup>th</sup> National Trail in England in Wales was opened in May 2003 after 8 years of development. What sets HWP apart from other national trails is its archaeological context - approximately 85% of the route lies within Hadrian's Wall World Heritage Site and Hadrian's Wall is a Scheduled Ancient Monument.

This context has influenced the Trail's research and development process and its future management is underpinned by the aim of conserving the archaeological resource. While the economic benefits that it has brought to the region are significant, the Trail project must at all times ensure that its management systems, marketing and promotion are geared to a conservation ethos. It must try, also, to influence other organisations, including the regional tourism agencies, to seek consensus on its wider promotion.

Government approval for the Trail's creation was dependent upon satisfying English Heritage that the integrity of the Ancient Monument would not be compromised by the Trail. This was achieved largely by undertaking, in 1992, an archaeological impact study of the proposed route; however, there remained concerns within the archaeological community. Subsequently, the Secretary of State inserted a condition that the Trail be managed as a natural green sward, as this is considered to be the best way of protecting any buried archaeological deposits and the setting of the monument. This condition has resulted in the Trail's development taking longer to achieve than, otherwise, would have been the case. However, it has established a firm foundation for its future management.

Some £6m has been spent, between 1995 and 2003, on establishing the Hadrian's Wall Path (including £300,000 on 45 circular walks linked to the Trail). Pathworks, marketing and other programmes are continuing. In addition, the Hadrian's Wall Tourism Partnership - comprising the local and national park authorities, Northumberland Tourist Board, English Tourist Board, Countryside Agency, English Heritage, National Trust and others - is progressing a £3.65m SRB scheme to enhance marketing, awareness, public transport provision, business development and visitor information associated with Hadrian's Wall and Hadrian's Wall Path.

#### **Management Structure**

##### **During the trail's development**

The Trail project's development was managed and funded by the Countryside Agency, with a majority contribution from the Heritage Lottery Fund. The Agency funded and accommodated a National Trail Officer (NTO), who was employed by one of the highway authorities. In addition, the highway authorities were funded to employ other dedicated staff during the Trail's development to negotiate with landowners and progress the legal path order-making process, using the services of the County Solicitors. Support staff included -

- a valuer - employed by Cumbria County Council, but acting in an independent capacity
- an independent archaeological consultant - appointed in 1996, to advise on the archaeological impact of the Trail and any necessary mitigation measures
- 2 staff employed by Cumbria County Council and a contract fieldwork team
- 2 fte staff employed by Northumberland County Council and a team of 3 fieldworkers
- volunteer coordinator and 0.5 fte staff employed by Northumberland National Park Authority.

A **Steering Group**, chaired by the Countryside Agency, oversaw the whole process, its members included representatives of English Heritage, English Nature, National Trust, RSPB and Northumberland National Park Authority. A **Technical Advisory Group**, comprising representatives of the NFU, CLBA, Ramblers' Association and Long Distance Walkers' Association provided a forum for these organisations to contribute advice and opinions.

### **Current management arrangements** (post-development)

The Steering Group and Technical Advisory Groups have merged. This has proved popular, as farming and amenity groups feel they have a more responsible role in the whole process.

The National Trail Officer continues to be employed by one of the county highway authorities, but accommodated and funded by the Countryside Agency. Other staff support from the highway authorities has been reduced significantly, partly reflecting the fact that the Trail is open. However, after 9 years, some implementation projects remain to be undertaken.

### **Development Stages**

The history of the Trail can be traced back to the Dartington Amenity Research Trust (DART) report of 1976, which documented, for the first time, problems of overcrowding and damage to the archaeology of Hadrian's Wall. However, it was not until 1984, when the Hadrian's Wall Consultative Committee published its Strategy for Hadrian's Wall, that creation of the Hadrian's Wall Path was formally proposed. The timeline can be summarised as -

- 1984** Strategy for Hadrian's Wall published
- 1987** Project Officer appointed and route researched
- 1992** Archaeological impact study & ground condition surveys
- 1993** National Trail submission document submitted to Sec. of State (October)
- 1994** Government approval (November)
- 1995** Trail Officer and key highway authority staff appointed (June)  
Preparation of Heritage Lottery Fund bid began
- 1996** Archaeological consultant appointed (March)
- 1996** Monitoring regime established (May; twice-yearly monitoring using fixed-point photographic sites)  
Economic impact study to support HLF bid  
Development and Management Plan prepared to support HLF bid  
HLF bid submitted (March) and approved (November)
- 1997** Trail implementation (previously low key), speeds up, including -
  - **03** - initial negotiations with landowners
  - field-walking with archaeologist
  - consultations with English Heritage and, where necessary, with English Nature
  - preparation of detailed management plans
  - final agreement with landowners on route alignment
  - assessment of compensation for new PROW creations
  - applications for Scheduled Monuments Consent by archaeological consultant
  - pathworks undertaken
- 1999** advice from consultant to ensure publications are DDA compliant  
first pack of 'corridor' circular walk leaflets published  
Limits of Acceptable Change Forum established
- 2001** publication of *Every Footstep Counts* - the World Heritage Site Code of Respect
- 2002** guidebook author appointed and route walked  
public relations plan for Trail opening prepared  
Web site company appointed  
final set of corridor circular walks published (45 walks in total)  
Towards an Appropriate Assessment Study



- 2003** Web-site written and edited  
liaison with media; attend trade shows (January - April)  
accommodation guide published (March)  
Web-site launched and guidebook published (April)  
Trail opening (May)  
route surveyed for damage, wear and tear, etc. (July)  
marketing consultant appointed to write marketing plan (November)
- 2004** draft marketing plan received (February)  
accommodation guide published (February)  
founding of Hadrian's Wall Path Trust (February; membership based charity)  
facilities & services guide published (March)  
development works are continuing.

### **Main Strategies and Studies Undertaken**

- 1976 Dartington Amenity Research Trust (DART) Report** - this report was fundamental to the establishment of the Trail and marked the beginning of the modern era of Hadrian's Wall as a recreational resource. It stands as a constant reminder of how uncoordinated Hadrian's Wall's management had become - with little or no strategic planning or guidance. The DART report continues to be cited widely and is referred to at least once in the World Heritage Site Management Plan.
- 1984 Strategy for Hadrian's Wall** - while the DART report set the scene, the 1984 strategy brought all the stakeholders together for the first time and set the first objectives, including those of spreading the visitor load and the economic benefits of tourism by -
- creation of a long-distance footpath along the entire length of Hadrian's Wall
  - developing the wider corridor of the Wall and its environs.
- A strength of the 1984 Strategy is that its recommendations were well thought through and the Trail Officer has been implementing its objectives for the past 8 years. The time spent in researching the background to the project has been a sound investment.
- 1992 Archaeological Impact Study** - by the time of this study, the National Trail had gathered momentum, to the point where the archaeological community had expressed concerns about pressures from recreation threatening the integrity of the Ancient Monument. A project officer negotiated a route in principle with farmers and landowners, then presented this to archaeological consultants, to assess the likely impact of Trail users on the Wall and its associated earthworks.
- A number of assumptions had to be made, but, with hindsight, the study probably failed to take sufficient account of the effects of climate, specifically precipitation, on the carrying capacity of the grass sward. It might have been wise, also, for the project officer to work with an archaeologist throughout the negotiation stage, rather than seeking an opinion after the event. The decision to appoint an independent archaeological consultant, at the start of the development stage, has saved time and expense. It has been stressed to landowners that the consultant was appointed to give impartial and unbiased advice and this has largely been respected.
- 1992 Ground Condition Survey** - essentially a 'snap shot' in time of the state of the ground and the Monument, before the route proposals were submitted to the Secretary of State. Although the Trail's alignment has been revised throughout its development stage (for farming and archaeological reasons), the condition survey remains an invaluable reference point. In 1996, it was taken a step forward, when a regime of fixed-point photographic monitoring was established, which informs annual programmes of work.

- 1993 Submission Document to Secretary of State** - the culmination of 5 years of route negotiations and ground surveys, this submission was regarded as justification for the expenditure of public monies and the long-term development of the Wall and its corridor. In 1987, the Wall was inscribed by UNESCO into the List of World Heritage Sites. During this process, questions were raised about the Trail's sustainability and the Submission Document attempted to address these. One undertaking continues to influence the Trail - that of the presumption that it would be managed as a natural grass sward path - this remains an underpinning aim for the Trail. This is a challenge, but one that the Countryside Agency and English Heritage see as a necessary long-term aim, if the Wall is to be managed in an environmentally sustainable way.
- 1996 Economic Impact Study** - this study was required to inform and justify the HLF bid. A key aim of the National Trail project is the economic development of the Wall and its environs. This study provided expert opinion on the contribution to, and multiplier effects derived from, long-distance walkers to the local economy. This study made a major contribution to meeting the HLF's requirements for funding. (£5,000 in 1996)
- 1996 Development and Management Plan** - prepared as part of the HLF bid, this remained the working plan throughout the Trail's implementation.
- 1996 Establishment of Monitoring Regime** - an essential facet of the National Trail's calendar is the spring and autumn fixed-point photographic monitoring exercise. The Trail is committed to this long-term strategy to record the condition of, and any changes to, the Monument. It provides, also, evidence to argue for additional resources. (monitoring fieldwork and reporting: £1,500/year)
- 1999 Fieldfare Trust DDA report** - following advice in 1999 that the Disability Discrimination Act would have important ramifications for the National Trail, in terms of path furniture, surfaces, signing and publications, the Fieldfare Trust was commissioned to evaluate some of the early leaflets and structure that were planned. The fieldwork and report have significantly influenced the overall approach and, while archaeology continues to constrain the Trail becoming inclusive to all ability groups, the publications and structures and bridges and signing, in particular - are as DDA compliant as possible. (£2,500 in 1999)
- 1999 Path Structures Manual** - the Fieldfare Trust report led to revision of the structures and signing manual, to ensure that the County Council and National Park Authority staff build structures to a standard design. This manual was drawn-up in-house.
- 1999 National Vegetation Classification (NVC) study** - this was undertaken in response to concerns from English Nature that use of the Trail might damage sections of the Solway salt marshes. A consultant from Sunderland University established quadrants for the Solway Marsh and six sites of nature conservation interest across the route. The Solway section was altered (see *Toward an Appropriate Assessment*, below); however, the NVC study has demonstrated the Trail's commitment to integrated management. (£3,000 in 1999)
- 1999 Limits of Acceptable Change (LAC) Forum established** - the Trail management establishing the first LAC forum for the World Heritage Site covering the path between Housesteads Roman Fort and Steel Rigg car park. LAC is recommended within the WHS Management Plan, as a visitor management technique to be used where recreation and conservation interests conflict. A LAC strategy now exists for this section of Hadrian's Wall.
- 1999 Agricultural Botanist's Report** - the Trail project lacked the skills to specify optimum management regimes, seed mixes and fertiliser rates to maintain a healthy grass sward for the Trail surface. An agricultural botanist provided advice, which has been used with some success. (£600 in 1999)

- 2001 World Heritage Site (WHS) Code of Respect** - the Trail project took the initiative and consulted upon and published *Every Footstep Counts* - the WHS Code of Respect. Every organisation concerned with the Wall, or its management, is signed up to the Code and it influences the overall 'messages' promoted about the WHS to visitors.
- 2002 Towards an Appropriate Assessment Study** - English Nature required that the Trail project undertake this study to demonstrate the effect of recreational pressure on the Solway Special Protection Area. As a result, the route was altered significantly away from sensitive over-wintering geese roosting sites. (£2,500 in 2002)
- 2003 Web site design, research and writing** - excludes GIS links (£9,500 + 10 days staff time; maintenance contract: £500/day)
- 2004 Hadrian's Wall Path Trust** - the founding meeting took place in February. The Trust - a membership based charity - should provide long-term support for the National Trail by engaging with its users, local businesses and the formal Roman sites and museums. It is establishing a **Foundation for the Trail** and will seek funds to assist its management. The **2004 Essential Guide** to the Trail's facilities and services, written by the Trail Officer, is to be published under the Trust's name with proceeds from sales paid to the Foundation. The Trust will assume responsibility for the annual review and publication of each year's guide.
- 2004 Marketing Strategy** - in preparation (£3,000)

### Key Strengths and Weaknesses of the Trail Development Programme

- a. **the National Trail's partner organisations have been willing to think long-term and commit their organisations to integrated, environmentally and economically sustainable countryside management** - the reports and strategies outlined above demonstrates this. As a result, the Trail is seen in the UK and abroad as an exemplar of good practice. Without this sensitive approach, the Trail might still not be open. However, while it has secured the broad support of English Heritage, English Nature, the World Heritage Site Management Committee and partners, such as the National Trust, it is a long-term, resource intensive commitment.
- b. **generous funding from the Heritage Lottery Fund and Countryside Agency** - the Trail's funding, throughout the development stage, was 75% from HLF and 25% from central government, through the Countryside Agency. It has been very well resourced, but cessation of HLF support has focused minds as to future finance beyond the annual exchequer settlement. The generous HLF commitment that has enabled it to create not only the National Trail, but a network of recreational routes in the Trail corridor. This is also a potential weakness - in terms of **future maintenance commitments**. For a project of the size and duration of Hadrian's Wall Path, **a key to its future success will be a planned strategy for the transition from capital to revenue finance**. This is being developed.
- c. **the Trail management's willingness to embrace farming and amenity organisations in the development process, with both groups contributing to solving issues and problems** - the Technical Advisory Group was established to provide a forum for discussion; however, a possible weakness was maintaining the forum as a separate entity to the main Steering Group. The two groups became amalgamated shortly before the Trail's opening. With hindsight, this should have been done several years ago; as both sides have achieved a degree of maturity and mutual trust, which could have only enhanced earlier discussions.
- d. **The project has sought to create 'added value' for, and achieve common objectives with, its partners** - so that it may succeed in the long-term.

- e. **partner organisations move at different speeds and deliver objectives to different timeframes and, sometimes, in a different ways** - any complex project must allow for differences; otherwise, the partnership approach may be seen as a weakness.
- f. **the Trail's key strength has been in maintaining a focus on its key aims** - this has been fundamental to its success during the 8 years of development, as external pressures and expectations have inevitably changed. The Trail is now open and a very successful first season has led in a short period of time to significant investment to overcome shortfalls in visitor infrastructure. This is a measure of its success, but the project must remember the reason for its establishment - to conserve the Wall and avoid the mistakes of the past.

### **Key lessons and recommendations**

- a. **plan for long-term revenue funding at an early stage** - capital funding will cease and funding for essential maintenance must be planned for, or the project may soon fail.
- b. **remember the project's key aims and objectives and maintain a focus.**
- c. **do not embark upon trail development, unless the key partners are committed to it for the long-term and get partners to sign up to a memorandum of agreement** - documenting key responsibilities as explicitly as possible.
- d. **employ project staff with a single management structure and answerable to a senior project officer** - dispersing staff within different employers results in poor communications, weak decision-making and a lack of focus. The most successful National Trails are those where partner highway authorities are mature enough to trust the management of the entire Trail to one authority that holds a central budget.
- e. **employ project staff on long-term contracts** - avoid contracts of three years or less, to provide employment security and avoid turnover of experienced staff.
- f. **draw up an implementation plan** - with standard working methods and structure drawings - this promotes consistent standards, while allowing for regional distinctiveness, if planned for at an early stage.
- g. **involve farming and amenity organisations within steering groups.**
- h. **employ one independent valuer across all the highway authorities** - use the Ryde's Scale for calculating landowners' compensation for new PROW creations.
- i. **seek common marketing and promotion objectives with regional tourist boards** - if there are important conservation objectives (e.g. seasonal protection of nature conservation sites), these must be understood and the route marketed appropriately.
- j. **plan for DDA compliance, where possible** - people with disabilities have recreational needs and spending potential.
- k. **develop recreational links in the Trail corridor** - to take pressures off the main routes and achieve conservation objectives.
- l. **establish a monitoring regime and use results** - to influence maintenance and funding
- m. **encourage the establishment of a Friends Group as soon as possible** - through facilitate its establishment. Involving local people creates a great deal of goodwill.
- n. **decide when to publish guidebooks and a Web-site and allow a realistic lead-in time** - unforeseen problems (e.g. the Foot and Mouth crisis) can hijack plans. Appoint the guidebook author and photographer long before the guidebook is required and prepare a good brief. This stage is the only opportunity to influence important messages to be included in the guidebook.
- o. **decide how much time is necessary for Trail development and allow for a generous contingency** - things will go wrong and need time to sort out!

Information: David Mcglade, Hadrian's Wall National Trail Officer

## Appendix B

### TRANS PENNINE TRAIL - BACKGROUND AND TRAIL DEVELOPMENT

#### The Trans Pennine Trail

The **Trans Pennine Trail** (TPT) is a 344 km (213 mile) multi-user trail - for walkers, cyclists and, where suitable, horse riders and all abilities users - from Liverpool to Hull. The Trail network, including extensions to Southport and Hornsea, and links to Leeds, York, Sheffield, Rotherham and Chesterfield, extends to 555 km (345 miles). It is largely purpose-built and traffic-free - comprising surfaced, level paths along canals, riversides, disused railway lines, minor roads and cycle tracks. The Trail includes part of the National Cycle Network, is crossed by the Pennine Way and Pennine Bridleway National Trails and is the UK section of the European long distance walking route network (E8). A quarter of the UK's population lives within 20 miles of the route.

The Trail is fulfilling a range of objectives, including promoting sustainable transport, recreation and tourism, encouraging healthy exercise and generating economic benefits for local communities. Its development has included environmental improvements and has led to the establishment of new businesses catering for users (e.g. walking/cycle holiday operators).

Surveys in 2002 show that local people used the route mostly for cycling (50% of use), walking and running (29%) and dog walking (18%). Riding, pushchair users and wheelchair users each comprised about 1% of all users. 12% of users used the Trail for local sustainable travel - to visit people (4%) or to travel to shops (3%), work (3%) or schools (2%). Day trips for recreation to enjoy peace and the countryside accounted for 32% of use. Holiday use was under 1%, but such users spent more (£17.24/day) than day users (£1.22).

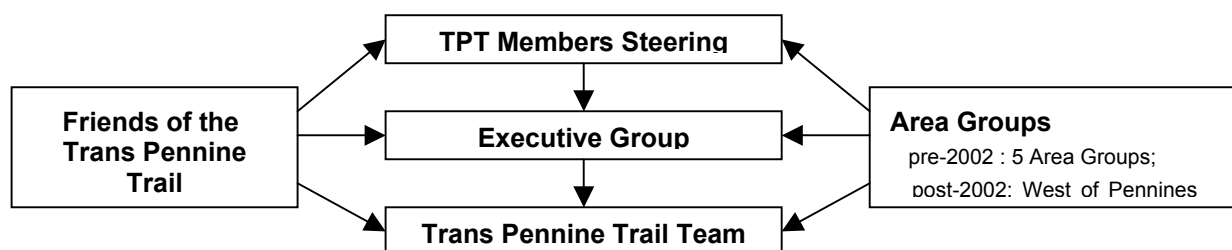
#### Establishment of the Trail

In 1983, John Grimshaw of Sustrans initiated work on the Liverpool Loop Line cycle path, which became an initial section of the TPT. The Selby-York Path was already constructed. Subsequently, Sustrans prepared a feasibility study for a trail from Liverpool to York for Barnsley MBC.. This was 'championed' by Robin Norbury of Barnsley MBC, which invited all relevant councils to a meeting in 1986, at which the principle of the trail was accepted. A detailed feasibility study generated support for the proposed Trans Pennine Trail and an Interim Secretariat was set up in Barnsley. At this point, the 26 local authorities agreed to cooperate to develop sections of the Trail within their areas and to form a Steering Group and Executive Group (see below).

In 1991, the first TPT Officer was appointed, with funding from the partner authorities, 50% funding support from the Countryside Commission for the first 3 years, and accommodation and services provided by Barnsley MBC. The TPT Officer was instrumental in coordinating information on route development requirements and bidding for Millennium Commission funding (£5.8m) and subsequent ERDF funding (£2.2m), which along with funding from Yorkshire Forward, local authorities, Countryside Commission, United Utilities and other funders has enabled expenditures of over £20m on developing and marketing the Trail. The TPT was promoted with an Inaugural Ride in 1989 and opened at Southport in 2001.

## Organisation of the Trail

The Trail is managed by a management partnership of 26 local authorities, which is illustrated and described below and illustrated in the following diagram.



Key elements of the management structure are -

- **Members Steering Group** - comprising elected members and officers of the 26 local authorities, and representatives of national organisations, funding partners and user groups (e.g. British Waterways, Yorkshire Forward, Friends of the TPT, Ramblers Association, CTC, BHS). The Steering Group met twice yearly during the Millennium Commission funding stage to agree policy and direction of the project and receive progress reports from the Project Officer. The Steering Group now meets annually
- **Executive Group** - prior to 2002, this comprised of a senior officer representing each of 5 Area Groups and Barnsley MBC (as 'host'), two representatives of Friends of the TPT and the Trail Officer. It met every two months to oversee progress during the Millennium Commission funding stage and to oversee and guide the work of the Trail Officer
- **Area Groups** - up to the end of 2001, 5 Area Groups (Mersey, Gt. Manchester, Pennines, Central and Eastern) comprised officers of the respective authorities, a local Friends representative and TPT staff. These Groups met every two months to coordinate information on development of the Trail in each Area. In 2002, the Area Groups were replaced by 2 larger groups - Irish Sea to Pennines; Derbyshire/Yorkshire to North Sea - which meet twice-yearly, with one meeting focussing on best practice, route improvement and maintenance and funding, and the other on joint promotion, market research and Trail-based tourism
- **Trans Pennine Trail Team** - comprising the TPT Officer, TPT Assistant and, until 2002, a Millennium Co-ordinator. Work of this Team includes administering and coordinating Trail development, fund-raising and monitoring grant expenditures, servicing and organising the management structure (above), policy formulation, supporting the Friends of the TPT, national marketing and PR work, advising and assisting the local authorities and others, and lobbying on behalf of the Trail (e.g. against development threats). Currently, each of the 26 local authorities contribute around £3,000/year to support this Team.
- **Friends of the Trans Pennine Trail** - this is a voluntary group with around 270 subscribing members, who assist in user surveys and simple maintenance work, and promote the Trail through talks, displays, supplying TICs and libraries with Trail leaflets and campaigning on behalf of the Trail. The Friends provides around 70 voluntary **Trail Stewards**, who act as 'eyes and ears' for the Trail managers (local authority route managers, TPT Team) and report maintenance problems, etc..

## Key Tasks following Development of the TPT

The main tasks facing the TPT Team and its management groups include -

- promoting and marketing the Trail regionally, nationally and internationally
- promoting the further development of tourism and visitor services
- developing better links with the local communities, including developing Safe Routes to School schemes and further developing the Trail Stewards and Friends networks

- developing and promoting public transport links to the Trail and access for disabled users
- dealing with threats from development - especially new transport links on former rail lines and commercial and housing development
- seeking and securing continuing funding
- coordinating, monitoring and ensuring high standards of maintenance, facility provision and improvements, including promoting best practice
- monitoring use of the TPT.

Each partner authority undertakes an annual survey of the condition of the Trail and submits information on key issues and expenditures.

### Key 'Lessons' from Development of the TPT

#### a. organisational aspects -

- **benefits of key champions for the Trail** - key people in influential positions have championed the initial establishment and continuing development of the Trail. Barnsley MBC has played important lead and hosting roles and provided financial, legal and administrative services
- **vital role of the Trail Officer and Team** - the TPT has benefited from the employment of dedicated TPT Officers and a TPT Assistant, and a Coordinator during the Millennium Commission funding phase. The skills, capabilities and enthusiasm of these individuals have played important roles in progressing the Trail. Adequate and continuing funding is required to attract and provide job security for such staff
- **support of the Friends of the TPT** - this Group provides valuable practical and lobbying support.
- **problems of an informal partnership** - the 'loose' Partnership structure, responsible for driving and overseeing the development of the TPT, has generated problems, with some local authorities failing to 'deliver' funding or development work. The Partnership and TPT have progressed at the pace of the slower and less committed organisations
- **difficulties of maintaining momentum and enthusiasm** - one of the main issues is maintaining the momentum and enthusiasm of partner organisations, key staff and supporters of the Trail over the long development stage and once the Trail is operating
- **lack of corporate status of the TPT Partnership** - this has led to a requirement for one partner organisation to act as 'banker' for strategic funds, with consequent burdens of financial monitoring and reporting, and pursuing other partner bodies for match funding for joint programmes (e.g. marketing)
- **varying support of partner organisations** - some partner organisations have provided continuing support through elected members and senior staff, but others have been represented by less committed members and more junior staff, who have been unable to commit their authorities to decisions, funding or implementation. For some authorities, the TPT has low priority amongst other programmes
- **over-stretch of the TPT Officer and staff** - the two staff are under increasing pressure to 'deliver' a wide range of programmes
- **requirement for the lead officer to have some delegated powers and decision-making capabilities** - rather than having to seek approval from the Executive Group, or Steering Group, on every-day issues, as is the case with the TPT.

#### b. Funding

- **varying levels of funding commitments by partner organisations** - gaining funding commitments from less-committed partner organisations has been an extremely time wasting and burdensome task for the TPT Officer and other lead personnel

- **Millennium Commission funding was a critical element in progressing the TPT** - as an incentive to partner organisations providing match funding and a boost to progress - e.g. due to the discipline imposed by the Millennium Commission
- **local authorities are in a strong position to access a wide range of funding** - e.g. reclamation and Local Transport funds

**c. Trail Development**

- **need for realistic timescales for Trail development** - the TPT has taken over 10 years to develop and some sections are still on temporary alignments. Indeed, it is now some 18 years since the initial concept was agreed in principle (i.e. in 1986)
- **need for considerable engineering and other professional staff inputs** - while external consultant engineers and others can provide technical expertise, staff of the partner authorities have local knowledge (e.g. land stability issues, other hazards)
- **potential benefits of an initial engineering survey** - the TPT was dependent on estimates for works prepared in-house by local authority's and other partner organisations' staff. Criteria and expertise varied and many initial costs were underestimated. An initial engineering survey, incorporating local engineering and other knowledge could provide a stronger basis for identifying route development requirements and estimating costs. Capital cost estimates should include professional staff inputs for design and supervision work
- **need to allow for contingencies in budgeting for development and maintenance works** - for example, contingency allowances for damage/loss of the route as a result of ground instability, flooding, etc.
- **dependency on rights of way as the basis for a multi-use route poses a range of problems** - including delays and obstructions posed by negotiations with landowners and legal issues and objections from walkers to up-grading footpaths to bridleway status. The availability of sections of council owned land and disused railway lines proved advantageous to the development of the TPT
- **issues of gaining progress reports and other data from some TPT partners** - while the Millennium Commission required detailed monitoring of progress, it often proved difficult to get timely and accurate data from all 26 local authority partners.

Information : Pam Ashton (former TPT Officer), Val Hough (Sefton MBC) and various documents.



## Appendix C

### SOURCES OF INFORMATION

The consultants have drawn on information and advice from a wide range of individuals and organisations during the preparation of this Report (organisations listed below). The time and resources available for this contract resulted in only a selection of potential partner organisations and other interested parties being consulted; however, many other organisations were contacted during the initial *Concept Feasibility Study*. All information and assistance provided for this or, indeed, the previous study is gratefully acknowledged.

Arnside & Silverdale AONB  
Capita  
Cheshire County Council  
CPRE  
Cumbria County Council  
ExeGesIS SDM Ltd.  
Flintshire County Council  
Friends of the Lake District  
Groundwork North West  
Groundwork West Cumbria  
Hadrian's Wall Path  
Lake District National Park Authority  
Lancashire County Council  
Lancaster City Council  
Mersey Partnership; Mersey Waterfront Regional Park  
North West Coastal Forum  
North West Development Agency  
North West Regional Assembly  
North West Tourist Board  
Pam Ashton (former TPT Officer)  
RSPB  
Sefton Metropolitan Borough Council  
South Lakeland Council  
SUSTRANS - Cumbria, North West  
Trans Pennine Trail Partnership  
Wirral Metropolitan Borough Council