Finding Opportunities to Improve Monitoring Activities through Local Collaboration

Guidance Document

Introduction

This document provides guidance for carrying out a project to improve environmental monitoring activities. It draws on the experiences of a pilot project in the Hampshire Avon catchment and links to relevant reports and resources from that project.

1. Establish project

A defined geographical area is recommended for this type of project.

There are several factors to be considered when establishing the project and defining the area:

- The most suitable geographical boundaries for the project should be considered. For the pilot, a river catchment was chosen. However other areas such as county boundaries, National Character Areas, Protected Landscapes or Nature Improvement Areas could be considered.
- The purpose of the project is important. For example, if monitoring collaboration is needed specifically for Water Framework Directive activities, a river catchment may be the best area. However, if collecting biodiversity data is the focus, using a county boundary for the project could be more beneficial as the Local Records Centres are county based.
- Other relevant projects should be considered. For the pilot project, the presence of one of Defra's Demonstration Test Catchment projects provided an incentive to choose the Hampshire Avon catchment, as having a project already established there was useful for providing contacts.
- Consider the project aims to ensure relevant organisations are invited. The pilot project focused on environmental monitoring in general, therefore organisations that carried out monitoring across all the environmental domains were invited. However, if the focus is on Water Framework Directive monitoring, terrestrial biodiversity monitoring may be discounted.

2. Background research

Find out what monitoring activity is happening in the chosen area.

- Determine which organisations are monitoring in the catchment area, and to what extent. This will provide a basis for the research. Mapping of activities can help and information can be determined in other ways, for instance through the UKEOF Catalogue and NBN Gateway, or directly from organisations such as Environment Agency, Natural England or the Centre for Ecology and Hydrology.
- Gain support from organisations and find out further details about their monitoring activities. In the pilot project, organisations that were known to be monitoring in the area were contacted to agree initial support to the project. Following this, a [questionnaire](#) was distributed to those organisations which aimed to find out more details about their monitoring activities, such as where, why and by whom their surveys are being carried out. It is important to note that in the pilot project, organisations did not necessarily see this work as a priority and therefore follow up with organisations was required to ensure that questionnaires were submitted within a reasonable timescale.

- Analyse the questionnaires returned by organisations. A questionnaire analysis report was produced in the pilot and circulated to participating organisations, to give them an understanding of the current monitoring landscape in the chosen area. A document setting out the different types of possible collaboration was also sent to organisations at this time to set the context for the types of discussions that would be held at the workshop.

3. Workshop

Hold a workshop to bring together organisations to discuss collaboration.

- The timing of the workshop should be considered carefully. For the pilot, the workshop was organised for October. Much of the initial background research had been carried out over the summer months and this was quite slow due to summer holidays, and the summer monitoring season delayed responses. October was timely in that it occurred soon after the questionnaires were returned, and therefore fresh in participants' minds and not a holiday season, enabling good attendance.
- A well-located venue should be chosen, within the chosen area/catchment. For the pilot, the venue was at one of the participating organisations, Game and Wildlife Conservation Trust headquarters.
- The format of the workshop will depend on the number of participants but the sessions should enable participants to establish where there may be potential for collaboration (informally for fewer participants, or with structured sessions for more participants). The pilot workshop was split into the following sections:

a. **Feedback from questionnaires –** an overview of the feedback questionnaires was given, taken from the questionnaire analysis document. This helped set the tone for the workshop as well as acknowledging that participants' contributions had been valuable.
b. **Presentations on monitoring activity –** Organisations gave 5 minute presentations about the monitoring work they were carrying out in the Hampshire Avon catchment. Due to the number of organisations presenting material, this required strict time-keeping to ensure that the session did not overrun. This session helped to focus participant's attention on the Hampshire Avon catchment and raise potential areas of interest for later in the discussion.
c. **Discussion tables-** Participants were split into three groups to consider different aspects of collaboration: resource sharing, knowledge exchange and data synthesis. These three topics worked well for this workshop and covered the range of possibilities for collaboration. This helped give participants ideas for collaboration ahead of the speed collaboration session.
d. **Speed Collaborating –** Participants had 5 minute conversations with every other participant at the workshop and noted down actions towards potential collaboration between their organisations. This worked well and ensured that everyone had a chance to speak to everyone, enabling the possibility for interaction where it might not otherwise have happened.
e. **Feedback and actions going forwards –** This session wrapped up the workshop and participants were told what the next steps would be, to keep them informed and to show that the results of the workshop would be used. Participants were also given the opportunity to fill in a feed-back form regarding the workshop.

4. Workshop Follow-up

Follow up with workshop participants to maintain momentum.

- Initial contact should be made with participants, soon after the workshop to keep momentum in any actions to be taken forwards. For the pilot project, forms were filled in during the speed collaboration session which were collected at the end and then sent by email to the participants the following day, to ensure a record of the actions was held.

- An interim report is a useful method of pulling together what has happened in the project to that point and another way of helping to maintain momentum with the participating organisations. For the pilot project, an [interim report](#) was produced which set out the aims of the project and progress to date, and included details of the workshop. This report was circulated to all workshop attendees which was helpful to remind them about the project and to show that their contributions had been considered.
- It is important to communicate next steps of the project to participants. For the pilot project, participants were informed when they were sent the interim report that they would be receiving a telephone call 6 months after the workshop to start to monitor whether the workshop was having any impact.

5. Impact reporting

Find out whether the project has any impact, and if monitoring activities have been improved through collaboration.

- It is recommended that organisations that participated in the project should be contacted within a set period of time following the workshop to find out if a difference has been made. In the pilot project, participants were contacted to arrange a telephone interview for six months after the workshop. At this point, participants were also re-sent their actions from the speed-collaboration session.
- The purpose of the impact assessment should be clearly communicated. For the pilot project, the purpose was to find out whether there would be value in repeating the project elsewhere, or whether there is any best practice guidance that could be compiled and distributed within organisations that monitor in other geographical areas. However, for other projects, the purpose is likely to be different, for example to find out if collaboration over monitoring is occurring and to assess what further facilitation is required.
- Follow up by telephone is recommended to enable a full discussion around realised and potential impacts from the project. In the pilot, telephone interviews were held six months after the workshop and lasted approximately 45 minutes. They were recorded to enable a smoother conversation. Transcripts for these phone interviews were written up and included as an annex to the impact report.
- The results from the impact monitoring should be detailed in a report. An [impact report](#) for the pilot was compiled which outlined the collaborations in monitoring which have been realised as a result of this project, as well as considering the barriers to collaboration that were identified. Consideration was given to whether organisations had seen any financial or time savings as a result of the project during the telephone interview and the results of this were also documented in the report.

6. Ongoing Facilitation

It is recommended that ongoing facilitation is maintained to ensure momentum in realising collaborations.

- Ongoing facilitation is recommended. It is unlikely that full collaboration will be realised in a timescale as short as 6-months, therefore further facilitation is likely to be required. For the pilot project, UKEOF will not assume an on-going facilitation role. However, further scope for collaboration was noted, and a facilitating organisation would help enable this, so one would need to be identified.

List of Reports:

- [Interim project report](#)
- [Impact Report](#)

List of Resources:

- [Monitoring activity questionnaire](#)
- [Questionnaire Analysis report](#)
- [Potential Types of Collaboration Report](#)
- [Workshop feedback](#)