

CASE STUDY

NatureScot

› EFFECTIVE PROJECT  
MANAGEMENT IN GREEN  
INFRASTRUCTURE  
WITH PRINCE2<sup>®</sup>

# 1. INTRODUCTION

NatureScot is the Scottish Government's agency for all matters relating to nature. The website Nature.Scot also hosts their Green Infrastructure Strategic Intervention (GISI) project pages.

GISI is a £16 million European Regional Development Fund (ERDF) that NatureScot manages on behalf of the Scottish Government. The 15 capital projects supported by the fund are predominantly managed by local authorities, but three are managed by housing associations, and one by an NHS Board. They fit well within the PRINCE2® definition of a project because they are all temporary and are delivering a specific change in-line with a business case.

The GI Community Engagement Fund is smaller (£0.5 million) and supported 11 applications to increase involvement in greenspace, within areas of multiple deprivation. Nine of these proposals were delivered by charities. These grants did not closely align with the definition of a PRINCE2 project, because they were much more closely linked to business as usual (BAU) for the applicants. The exception was a pilot to work with a discrete community to design and install a 'raingarden' to reduce surface water flooding within a small area beside two tower blocks.

Martin Faulkner, the Green Infrastructure Project & Funding Officer, is responsible for overseeing various initiatives aimed at enhancing green spaces in urban Scotland, and serves as the primary point of contact for the following key areas:

- › 8 construction projects that are creating or improving greenspace and other green infrastructure in areas of multiple deprivation in urban Scotland
- › 6 community engagement projects
- › Communications to encourage the mainstreaming of green infrastructure

# 2. BACKGROUND

In Scotland, the mainstreaming of Green Infrastructure (GI) into projects is behind London and mainland Europe, and actors tend to work in isolation, even though they have good links with EU and global networks. In order to address this, one of the objectives of the GISI is to encourage a network of actors in the GI field to reduce siloed working and increase momentum towards mainstreaming GI in Scotland.

Green infrastructure (GI) is the network of multifunctional greenspace and other vegetated features, and is being increasingly recognized as important as 'grey infrastructure' such as roads, sewage networks, etc. GI can address multiple problems faced by society in the face of climate change and biodiversity loss. A well-designed and maintained GI has been proven to improve mental health, help with urban cooling, maintain good air quality, reduce surface water flooding caused by extreme rainfall, and encourage active travel when integrated with active travel networks.

The Knowledge Exchange project was part of a programme to fund GI projects, best called the Green Infrastructure Strategic Intervention (GISI).

**Table 2.1 Main stages of the GISI**

MAIN STAGES OF THE GISI	DATES
Test market for grant intervention	› Sept 2013 to Dec 2014
Develop fund criteria, processes, and products to secure funding and Lead Partner status	› Dec 2014 to July 2015
Manage applications and funding for Phase 1 projects and Community Engagement and promote the GISI	› July 2015 to June 2023
Repeat for Phase 2 projects	
Review project and close	› June 2023 to Dec 2023

### 3. AIMS AND OBJECTIVES

The specific aims of the Knowledge Exchange in September 2018 event were to:

- › host a GISI stakeholder event at a venue in the Central Belt
- › aim the event at organizations with GI funding, staff from other ERDF Strategic Interventions in Scotland, Scottish green infrastructure network partners, and organizations that are potential applicants in future funding rounds if Phase 2 does happen
- › have an event that is relevant and interesting enough to attract capacity attendance
- › ensure that NatureScot's profile is prominent at the event and in the communications surrounding it
- › visit one or both sites from Round 1 that are making progress on the ground, or another green infrastructure project.

The event was part of NatureScot's Sharing Good Practice series and needed to be within the set budget of £2,000. The long-term goals were to promote more collaborative working or knowledge sharing among actors in the UK GI field, and to influence the Shared Prosperity Fund that was to replace EU Structural Funds post-Brexit.

The benefits resulting from the event will be that the network of organizations delivering and managing green infrastructure will be strengthened. Green infrastructure will have increased further in prominence, as an important part of modern urban planning and management.

"Green infrastructure (GI) is the network of multifunctional greenspace and other vegetated features."

**Martin Faulkner**, Project Manager, NatureScot



## 4. APPROACH

A Sharing Good Practice (SGP) event is an opportunity to apply the PRINCE2 principle 'Learning from Experience' since projects with grants have valuable knowledge and experience that can help other potential applicants. The presentations at events are valuable, but just as important are the informal networking opportunities, and, ideally, on-site discussions during site visits.

The involvement of speakers with high profiles in the GI field, such as our CEO and staff from the ERDF Directorate that approve our funding, indicated that the success of the event could not be left to chance. During a period of austerity, attendees needed to be sure their time would be worthwhile.

### **Specifying the requirements was one of the first steps:**

- › Each project should be given the chance to present to the audience.
- › There must be two speakers (keynote and summing up) with UK prominence in the GI field.
- › The participants should be welcomed to the event by either the Chair or CEO of NatureScot.
- › The programme needs to have visits to projects.
- › Sustainable travel must be a reasonable option.
- › Publicity must credit NatureScot, GI, ERDF and partner organizations.
- › Catering companies must source food locally when possible.
- › Any organization involved will expect to see their project credited appropriately.
- › People attending will provide feedback.
- › People attending will have real opportunities to share their experience and learn from others attending.

"A Sharing Good Practice (SGP) event is an opportunity to apply the PRINCE2 principle 'Learning from Experience' since projects with grants have valuable knowledge and experience that can help other potential applicants."

**Martin Faulkner**, Project Manager, NatureScot

### 4.1 DESCRIPTION OF PLANNING PROCESS

The Sharing Good Practice (SGP) had an established process in place which we used the PRINCE2 method for. After the Knowledge Exchange was accepted, as part of the programme, two members of the SGP team were assigned as contacts, one of whom sat on the project executive as a senior supplier. The second person helped with most of the administrative tasks.

#### **The project board included:**

- › Head of GI Fund team in NatureScot: project executive
- › Manager of Sharing Good Practice team: senior supplier
- › Head of Strategy at Central Scotland Green Network Trust: senior supplier
- › Key contact from one of the Glasgow projects: senior user
- › Project & Funding Officer: project manager.

**Table 4.1 Breakdown of tasks**

TASKS	BREAKDOWN OF TASKS
Planning	<ul style="list-style-type: none"> <li>› Organize the programme</li> <li>› Organize catering</li> <li>› Source the venue</li> <li>› Organize speakers, workshop leaders, and facilitators</li> <li>› Review dates to improve attendance, visit potential venues</li> </ul>
Pre-event	<ul style="list-style-type: none"> <li>› Publicity and promotion</li> <li>› Practical communications for the event</li> <li>› Draft in support from other parts of NatureScot</li> <li>› Organize any materials needed for workshops, specification, and management of facilitator contract</li> </ul>
On the day	<ul style="list-style-type: none"> <li>› Ensure that the equipment is in place</li> <li>› Greet attendees</li> <li>› Record the event</li> <li>› Risk assessment for any site visits</li> <li>› Draft tweets and decide on a hashtag search for the event</li> </ul>
Administrative	<ul style="list-style-type: none"> <li>› Upload the presentations to the website</li> <li>› Organize expenses payment and accommodation for speakers if needed</li> <li>› Information system security checks for viruses in presentations</li> <li>› Transport and subsistence (T&amp;S) for speakers and workshop leaders</li> <li>› Book coach transport</li> </ul>
Project management	<ul style="list-style-type: none"> <li>› Produce the project brief</li> <li>› Complete the business case (online database form)</li> <li>› Maintain the daily log</li> <li>› Assemble the project initiation documentation (PID)</li> <li>› Manage the budget for the project</li> <li>› Manage the timeline</li> <li>› Deal with risks and issues arising</li> <li>› Record lessons to be learned</li> <li>› Write the closure report</li> </ul>

As an organization, we have existing tools to record and plan details of a project. Existing templates from Sharing Good Practice include: a planning timetable, tested programme timings, event checklist, and expenses forms. There is also a task list template available within NatureScot. In addition, we used the PRINCE2 Handbook to refer to best practice methods.

## 5. CHALLENGES

We faced a few challenges during the lifecycle of the project. Some of these were minor, handled in passing, and possibly unique to this project. Others are possible issues for future events and were included in the lessons report. The venue change and cost increase triggered a management by exception event and was escalated to the project executive. Once again, the PRINCE2 method facilitated solutions.

**Table 5.1 Challenges and solutions**

CHALLENGE	SOLUTION
The original venue withdrew from the contract three months before the event, and a few days before we were due to distribute the flyers about how to get to the event, etc.	› The information from the original venue search was still available, meaning a replacement was quickly found.
A TV news programme wanted to interview key personnel during the day, and with very little notice. The communications person had not been given clear boundaries.	› The team was briefed, so the project manager could advise on the interview without too much disruption. The Head of GI was able to do the interview.
The air conditioning was noisy and needed to be switched off by one of the venue team.	› Identifying team members to deal with unforeseen problems on the day was a good idea.
A field visit leader was ill on the day.	› A community member willingly stepped in on the day as a replacement because the project had high community buy-in.
The change in venue resulted in an increase of £600 to the overall budget.	› The project risk thresholds resulted in the increased cost being promptly handled via the appropriate route, which gave greater confidence to the decision-maker. The previous recording of venues as a saved project document made deciding a replacement faster.

## 6. SUCCESSES

The event featured on the regional TV news, which exceeded expectations. Organizations that were interested in applying for Phase 2 of funding attended and were inspired to apply. The event enabled networking that led to better quality applications. The GISI is agreeing contracts with Phase 2 projects, some of which may be showcased at the UN Climate Conference in Glasgow in November 2021.

Existing projects realized that they were part of a larger trend, which is likely to continue well beyond the lifetime of the GISI. The community food growing projects were inspired to increase efforts toward a Glasgow-wide network of community food organizations.

Taking a risk by including a facilitated session on the performance of the GI Team provided constructive feedback. Recommendations were included in NatureScot's response to the Scottish Government's consultation on the Shared Prosperity Fund, the replacement for European Structural Funds. The facilitated session also made explicit how the GI Team had improved by understanding that change is very common in project management, and endorsed our problem solving and project management focus.

The most serious challenge to the project was the booked venue withdrawing its availability, because of change to its charitable objectives. The clear definitions of project organization and management by exception in the PRINCE2 manual expressed that I did not have to make decisions alone. We had a strong 'focus on products', which was crucial when the original venue cancelled. The product description for the venue and recording of results from the initial search made choosing a replacement simpler and faster. It is possible that without these two documents, the event would have been cancelled.

The lessons report has led to changes in how projects that may attract media attention interact with our communications team. The communications personnel are giving clearer boundaries on what to expect on the day, and ways of further delegating tasks on the day allows the project manager to take part in interviews more flexibly.

#### **We were in the right position to be able to realize the benefits of the project outcome:**

- › The attendees are better connected, resulting in a network of community food growing projects.
- › The benefits were as described in the project brief and business case in the Sharing Good Practice database, but the publicity exceeded expectations.
- › The biggest contributor to success was the project brief (derived from AXELOS\*) in setting limits on the scope of the project, emphasizing the importance of learning from previous projects, and recording results.
- › We had thought to organize a similar event for the Community Engagement projects. However, a review of the lessons report concluded that the potential risk regarding management of grant claims was too great to organize, without the support of the SGP team, which had been abandoned.

"The clear definitions of project organization and management by exception in the PRINCE2 manual expressed that I did not have to make decisions alone."

**Martin Faulkner**, Project Manager, NatureScot

## **7. CONCLUSION**

PRINCE2 is a structured approach to project management that reaps benefits for individual project managers, their team, and the wider organization.

The clear structure of principles, themes, and products with tailoring provides a sound basis for project management. In this project it gave senior management the confidence to continue with the event regardless of unforeseen changes and increased costs.

The project brief and daily log were particularly useful in keeping the project within limits, prompting review, and ensuring sufficient staff resources were available.

PRINCE2 enabled us to assemble over 70 people, who are directly involved in implementing GI in Scotland and/or are strategic partners with NatureScot. The feedback from participants and speakers was positive. The facilitated feedback about the GI Fund application influenced NatureScot's response to the Scottish Government consultation on the Shared Prosperity Fund.

\*AXELOS Limited, a joint venture company created in 2013 by the Cabinet Office on behalf of Her Majesty's Government (HMG) in the United Kingdom and Capita plc (CPL), was acquired by PeopleCert in June 2021.

## 8. ABOUT THE AUTHOR

### MARTIN FAULKNER



I work for NatureScot's Green Infrastructure Fund, which is investing £15 million in nature-based solutions in deprived areas of urban Scotland. Before my current post I have had a wide range of roles in NatureScot; from working on National Nature Reserves in Aberdeenshire to a regulatory role in the West Highlands.

All of the roles have required project management, from managing footpath upgrades to notifying statutory nature sites. My current role is more complex, with greater financial and reputational risks and very tight deadlines. It has required me to improve my project management skills, as well as the soft skills that are needed to successfully manage a project.

In my spare time I play the flute in a community orchestra, and enjoy experiencing nature by sea kayaking and hillwalking.

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