



Ricardo
Energy & Environment



One-to-one Farm Advisory Service

2019/20 Business Plan for Scottish Government

Customer:**Scottish Government****Customer reference:**

Farm Advisory Service

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Contact:

Caroline Wood
Ricardo Energy & Environment
18 Blythswood Square, Glasgow United Kingdom

t: +44 (0) 1235 75 3310**e:** CarolineE.wood@ricardo.com

Ricardo-AEA Ltd is certificated to ISO9001 and ISO14001

Author:

Wood, Caroline E

Approved By:

Jamie Pitcairn

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Executive summary

Aims of the Service

Our vision is to deliver first-rate support to farmers, land managers and crofters, providing high quality advice that will help farmers to ensure their businesses are ready to meet the challenges of the future. This includes adapting to changing markets, improving Scotland's natural environment, reducing the impact of agriculture on climate change, and optimising business efficiency.

The aim of this business plan is to ensure that the users of the programme have a high-quality experience throughout their journey, from the efficiency and ease of application through to the delivery of a high-quality report tailored to meet their specific business needs.

Whilst the quality of the service is vital, we also have the challenge of building the awareness of farmers/land managers and ensuring uptake of the service. The programme shows a year on year build of momentum, this needs to continue. Ricardo propose to increase uptake by working with stakeholders and showcasing the value the programme has brought to those who have used the services to date.

The programme will continue to focus on adviser skills development to ensure there is a pool of advisers with the knowledge, skills and confidence to guide farmers through current issues and to meet future policy objectives.

Outcomes

- A wider spectrum of farmers will be aware of the service and encouraged to use the support.
- Farmer advisors will be trained to deliver high quality and consistent advice to farmers.
- Farmers engaging with the programme will be better informed on the overall sustainability of their businesses and able to make well informed decisions for the future.
- New entrants to Scottish agriculture, will be supported and able to access the advice they need to develop thriving farm and rural businesses.

Key deliverables

- ✓ The programme will deliver:
 - 300 Integrated Land Management Plans per annum
 - 100 Specialist Advice visits
 - 250 Carbon Audits
 - 60 New entrants will receive mentoring support
- ✓ The promotional campaigns will ensure there is wide awareness and clarity on the support available, with the service being specifically targeted to groups of farmers and crofters who need help the most and to support key policy objectives.
- ✓ Video and text case studies will promote awareness, uptake of the support available.
- ✓ Integrated Land Management Plans will incorporate a wider review of the business looking at the business and natural resources, soil and nutrient management, biodiversity and conservation, enterprise analysis, technical performance, cross compliance and greening. This more holistic review will ensure that the advice encompasses all elements of sustainability, economic performance, the environment and public good.
- ✓ The service will be integrated into the delivery of the one-to-many service, providing seamless referrals between components and ensuring customers can easily access the support they need
- ✓ The farmer will be treated as a valued customer and with a focus on providing a quality service throughout the user experience, including rapid responses to queries, quick decisions, and action coupled with quality assurance ensuring advisor reports are always high quality.
- ✓ We will track all customer interactions on a customer relationship management system (CRM) aligned to RDP reporting requirements.
- ✓ Transparency will be provided by robust management which will be supported by ISO accredited quality and reporting procedures.

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- ✓ We will create a reputation of flexibility and accountability for the Service, by proactively engaging with stakeholders to ensure delivery is informed by the marketplace and is responsive to wider user needs.
 - ✓ Training and continuous professional development of advisers will be provided and developed in response to identified needs.
 - ✓ Rigorous quality assurance processes will be continued to ensure that the reports received by customers are of a consistently high quality.

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1 Introduction

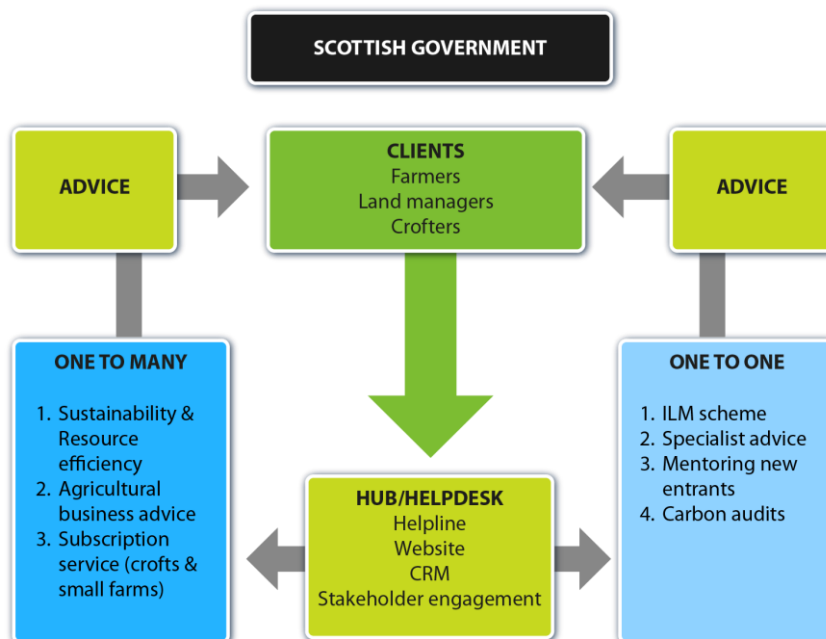
The Farm Advisory Service Scotland is a programme co-funded by the European Union and Scottish Government that will run till December 2020 with the aim of increasing the profitability and sustainability of farming and crofting enterprises across Scotland.

The service is designed to help support the sector to achieve sustainable growth via the nine outcomes identified in the Future of Scottish Agriculture discussion document:

- Sustainable Growth in Profits;
- Operating as part of a profitable and strong Food & Drink sector;
- Resilient Agriculture;
- Skilled farmers becoming more profitable and greener through training and education;
- Innovative best practice utilising Scotland's world class research;
- World leading green farming;
- A rewarding career in agriculture for New Entrants;
- A recognised contribution to Scottish Society;
- Leading role in local and global agriculture

The service is delivered through two contracts, the One-to-Many contract managed by SAC Consulting and the One-to-One contract managed by Ricardo Energy and Environment. The delivery of the two is integrated by the hub, with a shared advice line and website, so customers engaging with the programme should not perceive any split and be seamlessly directed to the most relevant service to meet their needs.

Figure 1 Diagram to show the integration of the FAS



1.1 FAS One-to-One Delivery

The One-to-One contract aims to ensure crofters, farmers and land managers have access to one-to-one consultancy support. These one-to-one visits will provide significant value to farmers/crofters as the advice is specific to their enterprise, locality and issues. The advisor will bring detailed local and enterprise knowledge and a fresh perspective. Through discussion with the farmer, the adviser can assess the 'vision' for the farm or croft, develop objectives and determine why certain management practices are followed and what options would be most suitable. The adviser is then able to talk these recommendations through with the farmer/crofter to establish an Action Plan. The service comprises three elements:

- ILMPs & specialist advice;
- Mentoring of new farmers; and
- Carbon audits.

Figure 2 Diagram to show the components of One-to-one advice



The scheme outputs align to the EU rural development regulation priorities one through to five inclusive:

- Fostering knowledge transfer and innovation in agriculture and forestry;
- Enhancing competitiveness of all types of agriculture and enhancing farm viability;
- Promoting food chain organisation and risk management in agriculture;
- Restoring, preserving and enhancing ecosystems dependent on agriculture and forestry; and
- Promoting resource efficiency and supporting the shift towards a low carbon and climate resilient economy in agriculture, food and forestry.

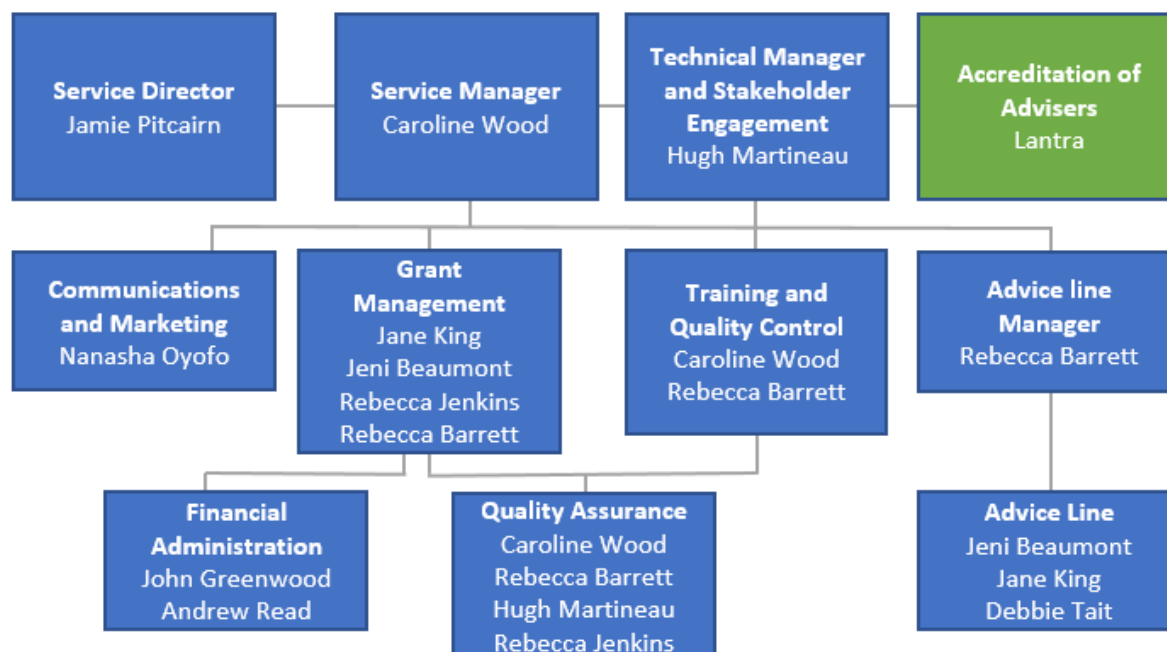
1.2 Business Plan

The FAS programme was launched to farmers on the 20th September 2016. This business plan presents plans for the forth full year of delivery of the Farm Advisory Service, the period from 1st April 2019 to 31st March 2020.

2 Contract Management

2.1 Team Structure

Figure 3 Team Structure



Our governance structure will ensure:

- **The Service Manager**, Caroline Wood, as the single point of accountability for all work delivered under the contract and the first point of contact for all communications with the Scottish Government
- **The Service Director**, Jamie Pitcairn, our Scottish Office Director, as a second point of contact for the Scottish Government and an advisor available to support Caroline should the need arise. Jamie will deputise at those times when Caroline is absent (e.g. annual leave).
- Effective management of the internal team and subcontracted organisations.
- That service delivery, value for money and quality advice are at the core of our delivery.
- Effective stakeholder engagement and integration with work delivered by the One-to-many programme.

3 Resources, deliverables for year

Table 1 below summarises the various meetings and the other deliverables, the following sections of this plan clarify the purpose and responsibilities for each deliverable.

	Deliverable	Page
REPORTING		
	Monthly Reports (12)	6
	Annual Report (1)	
MEETINGS		
	Bimonthly review meetings (x6)	6
	Steering Group meetings (x4)	6
	Stakeholder Group meetings (x4)	6
ACCREDITATION		
	Lantra accreditation of approx. 90 FBAASS Advisers	7
TRAINING		
	Presentations and training (x3 topics)	7
	Training events (x3)	8
	E-newsletter (x6)	8
COMMUNICATIONS		
	Web development and updates (x6)	8
	Case studies (x8)	8
	Press releases and feature articles (x6)	9
	Direct mail campaigns(x2)	9
	E-tool kit to stakeholder contacts (x4)	10
	Social media updates (12)	10
	Attendance at stakeholder meetings, and events (x8)	10
ADVICE LINE		
	Training to scale Advice Line's capability (x2)	10
DATABASE		
	Maintenance and update of Service CRM	10
SCHEME DELIVERY		
	ILMP's delivered (x300)	13
	Specialist Advice delivered (x100)	14
	Carbon Audits delivered (x250)	18
	Mentoring delivered (x60)	19
QUALITY ASSURANCE		
	100 ILMPs peer reviewed	23
	300 ILMPs (100%) light touch reviewed	23
	4 Meetings of Quality Review Panel	23
ADVISER PAYMENTS		
	14 Pay-runs per annum (4 weekly cycle)	28
MONITORING &		
	Feedback from advice recipient, analysed and reported	29

4 Reports

The Service Manager is the lead point of contact for the Service. The formal communication routes are:

- **Progress report** by phone call with the Anna Murray/Peter Begbie/Duncan Waldman as required.
- **Short monthly reports** sent electronically to the Scottish Government's contract manager within 14 days of the month end will be compiled by the service manager to detail the milestones achieved, metrics of delivery to date, plans for the next month, highlights and issues. Any issues will be updated on a joint sharepoint site.

In addition to the monthly report Ricardo will provide:

- a schedule of time bookings and direct costs,
- a completed EU reporting spreadsheet.
- Details of all ILMPs approved during the month for FEA checks
- **Annual report** Sent electronically to the Scottish Government's contract manager within 31 days of the end of the calendar year and compiled by the service manager, with material provided by the stakeholder manager, quality and advice manager & communications manager. The report will summarise the types, topics and advice activities conducted over the year, number of participants nationally and regionally, collate feedback from the year and consider any trends. The report will review issues raised and resolved through the year and lessons learnt and their implications on plans for the year ahead will be considered

5 Meetings

- **Bimonthly Meetings.** Ricardo will attend bimonthly management meetings held at the Scottish Government offices and attended by the Service Manager and Service or Technical Director. The meetings will jointly review the delivery and performance, delivery against plans, scheme uptake, feedback and outcomes achieved. The management group will discuss any issues and agree remedy actions. Actions and issues will be updated on a FAS actions and issues log (sharepoint site).
- **Steering Group Meetings.** When required Ricardo will provide service related input at these meetings. The meetings will be held in Scottish Government offices, attended by Service Manager and Service Director/or Technical Director.
- **Stakeholder Group Meetings.** During 2019 FAS will pilot the delivery of Stakeholder Group meetings. The meeting is an opportunity to promote understanding of what FAS can offer and to identify means by which stakeholders and FAS can work together to mutually support farmers. Organisations invited to attend the meeting include; NFUS, Scottish Land and Estates, NBE, NSA, STFA, QMS, SAAVA/CAAV, Lantra, RSABI, Soil Association, Industry Champions, AIC, AHDB, SAOS. Following the initial pilot in January 2019 and in consultation with the group it is proposed that the group reconvene on a quarterly basis.

We understand that industry and government priorities will change over the lifetime of the project, the purpose of the communication activities detailed above is to ensure that there is ongoing dialogue so Scottish Government and Ricardo can agree and plan any changes to delivery that will be required.

6 Accreditation

Ricardo will continue to work closely with Lantra who will manage the FBAASS accreditation of advisers. It will remain a requirement of advisers delivering Integrated Land Management Plans and Carbon Audits to be FBAASS accredited. Our well-regarded and relevant training programme will support the FBAASS accreditation process by demonstrating real value to our panel of advisors encouraging participation and the recruitment of new advisers.

Lantra are tasked with ensuring the advisor panel is sufficiently robust with approximately 90 advisers and an appropriate ratio of advisers from SAC to other organisations. Lantra will actively promote FBAASS accreditation to advisers and specifically target advisers who have a reputation for delivering high quality services. In addition, Lantra will review the geographical coverage of advisers and ascertain that this is appropriate. Word of mouth/adviser recommendation is an important marketing tool for the programme, it is important that we do not disadvantage farmers in certain geographies simply by having insufficient advisers in the region. Should these reviews identify a need to recruit more advisers Lantra will work to fill the gap.

Continuing the on-going peer review process, where Lantra have already reviewed an advisers' work within the year, they will not be required to provide further examples for resubmission. This will only be necessary in cases where an adviser is new to FBAASS or has not delivered an ILMP in the previous year.

The CPD requirements of advisers will still stand and advisers will be required to have gained 20 CPD points during the year.

7 Training

The FAS has a key role in providing training to enhance the knowledge of advisers in Scotland to deliver advice that meets the needs of current and potentially future agricultural challenges and government policy/targets.

Ricardo will continue to provide excellent training to advisers with the aim of building capacity in Scotland and ensuring that advisers delivering ILMPs have up to date skills and a holistic knowledge across the required topics. The training will be delivered through a range of mediums, utilising the on-line training site, via face-to-face adviser workshops, via webinars and bimonthly newsletters.

7.1 Defining content

The focus of training will be defined by a mix of:

- a) Feedback from advisers on where they feel they need further information.
- b) Feedback from the peer review of reports which details areas in which advisers are commonly weak.
- c) Feedback from Scottish Government and Stakeholders on areas in which they require advisers to be better informed.

At present, it is planned that training this year will cover diffuse pollution (training to be developed in conjunction with SEPA), the use of Farmbench (delivered with AHDB) to improve business performance, and change management (working with Christine Millar). However, if through the year it becomes apparent that there is a need for other topics to be prioritised, the plan will be revised, and if necessary we will deliver on additional topics.

7.2 Development of online training (3 topics)

The online training course provides several benefits:

- a) It is consistently available so advisers can revisit and refresh themselves at any time.

- b) It provides flexibility should a new adviser join the panel, or we identify a skills gap and need to recruit new panel members, the same training is consistently available, and once established can be delivered to new advisers with minimal costs.
- c) New training components may be launched at any time should we identify new needs subject to changing policy, without the high costs of convening a conference.

Training presentations will be developed by engaging the most relevant technical experts and working closely with policy leads and regulatory authorities to coordinate messaging and approach. Once technical content is agreed, our communications experts will design PowerPoint presentations. The PowerPoint presentations will then be developed further into on-line training that must be completed by advisers delivering Integrated Land Management Plans.

All training material will be signed-off either by Scottish Government, SEPA, SNH or an agreed expert before dissemination.

7.3 Face-to-Face Training workshops

In August/September a series of 3 regional workshops will be delivered, these will provide a forum both for training the advisers but also for advisers to provide feedback on their experiences and on how we can better support their delivery to farmers. Training will:

- Focus on areas identified by the peer review group as being weak in ILMP reports
- Deliver a session on utilising Farmbench;
- Provide training on softer skills to help farmers adapt to change; and
- Provide an update on forthcoming changes in policy/advisory requirements.

Training events will be open and free of charge to all advisers. Based on experience of delivering in previous years, it is planned that these will be held in Moffat, Stirling, and either Aberdeen or Inverness.

7.4 E-newsletter

Ricardo will continue to deliver the e-newsletter for FBAASS Advisers. This newsletter will be issued on a bimonthly basis utilising a system called Dotmailer. The newsletter will provide a current update on delivery through the scheme, feedback and news, and updates on any changes in policy or guidance of which advisers should be aware. The intention of the newsletter is to try to build a sense of team and common purpose and to keep delivery of the scheme at the forefront of advisers' minds.

8 Communications

Ricardo will use a range of mediums including social media to generate awareness of the website/advice Line and for each scheme. The marketing and communications will inform the fulfilment of the following objectives:

- Raising awareness of the advice available and publicising the routes to access the service.
- As a direct call to action, publicising through direct mail where appropriate or through stakeholder groups.

Communications will focus on increasing uptake. This will be achieved by meeting the farmer/crofter's demands and increasing their economic (cost saving or compliance) and environmental return. This is turn will be made possible through efficient targeting techniques. We will work closely with the one-to-many service to identify opportunities to promote the one-to-one service utilising all channels possible including newsletters, event feedback forms and wider joint promotional activity.

In promoting the service, Ricardo will seek to work with key stakeholder groups.

8.1 Website

The hosting and development of the website sits within the One-to-many contract. Ricardo will develop the content for the One-to-one contract but are not able to control, the visualisation of this content or the functionality of the website.

Ricardo will continue to work closely with Will Searle (SAC) to ensure that the web content is kept fresh and up to date.

8.2 Case studies

Case studies are highly effective in demonstrating the value of the service to farmers as readers identify that the support was beneficial to a business like their own.

Ricardo will identify businesses which would provide a good focus for a case study. Typically, businesses which are particularly high profile or those who have achieved significant benefits through their engagement with the one-to-one service.

The image displays a collection of content elements for case studies. At the top, there are several banner images with titles: "Case study One-to-one Specialist advice", "Adviser spotlight One-to-one Carbon audits", and "Case study One-to-one mentoring for a new entrant to farming". Below these are smaller sections with photos and text, including "How did you get into farming?", "What is a carbon audit?", and "How did you get into farming?". There are also quotes from farmers, such as "Going through FAS was helpful in that the programme was able to formally recognise his expertise and award him mentor status. Meaning his time could be compensated financially."

Ricardo will seek to:

- Promote case studies of monitor farms who have utilised the service
- Promote the use of the service by crofters and small farms
- Promote case studies of farms incorporating environmental management.
- Identify a mix of male and female farmers for all core services.
- Identify a range of experienced farmers and new entrants who have benefitted from FAS services and could feature in case studies.

8.2.1 Video and written content

In our experience the video case studies have the most impact and our preference is to use this medium, however we are aware that not everyone is comfortable being filmed and will always give the individual the choice.

Written case studies will be drafted by Ricardo's in-house copy writer and reviewed by a professional copy editor. Prior to any publication the business will review the material and only with their authorisation will the case study be published.

100 copies of each case study will be printed on high quality paper, to be made available through shows and events. Further print runs will be commissioned in response to demand.

Video case studies involve Ricardo working with the business to agree the format and script, a professional film maker then films on site and the video is then edited down. The final proof is approved by the business prior to circulation.

An article is normally drafted around each case study and this is circulated to publications and stakeholders to help ensure coverage in publications.

Case studies will be made available on the FAS website and circulated to stakeholders for potential inclusion on their own communications.

8.3 Press releases and feature articles

The Ricardo Public Relations team will work with agricultural and national press to promote the inclusion of our press articles. We will provide articles to publications such as: Farmers Weekly (ABC Audited Circulation 59,328); Scottish Farmer (ABC Audited Circulation 16,633), Farmers Guardian (ABC Audited Circulation 38,501). Press releases will also be set to a circulation list of wider industry weekly and monthly publications.

In addition to press releases, Ricardo will draft a feature article to launch each case study (detailed above), articles will be shared electronically with the stakeholder list and online via website. Where required articles will then be tailored to meet the specific needs of each publication.

8.4 Direct mail campaign

Targeted and bespoke direct mail can be a very potent means of encouraging uptake of schemes. During this year Ricardo plan to deliver three campaigns of direct mail.

1. Working with SAC to target farmers through the New Entrants to Farming project.
2. Working with SCF to provide a direct mail introduction to crofters.
3. Working with SEPA to promote services to farmers in priority catchments.

Ricardo will agree the targeting strategy with Scottish Government and will look to the Steering Group for input.

8.5 E-tool kit to stakeholder contacts

The e-tool kit was first launched in November 2017. This provides stakeholders with a timely update on FAS activities and links to articles, photos and social media content for inclusion in future communications. For exemplar see: http://i.emlfiles4.com/cmpdoc/2/1/2/7/1/files/476007_fas-2017---stakeholder-pack_new-entrants.pdf?utm_source=Ricardo-AEA%20Ltd&utm_medium=email&utm_campaign=8942099_SFAS%2FNAO-BB%2FED61746005%2FStakeholder%20email&dm_t=0,0,0,0

Ricardo will disseminate deliver a new stakeholder toolkit on a quarterly basis to focus on profiling a service or topic. Following on from the work undertaken to date, we will continue to explore opportunities to place regular monthly content in more stakeholder newsletter, at present we have secured coverage in Rural Issues, Crofting News and with the Scottish Rural Network.

8.6 Social media

Ricardo will continue to schedule regular monthly Twitter and Facebook posts directing traffic back to advice and grants page on FAS website. (Monthly). Posts will be themed around topical issues utilising images, videos and promotional material to encourage likes and sharing.

8.7 Attendance at shows, meetings and events

Ricardo will explore opportunities to provide speakers or representatives at shows and conferences where there are good opportunities to engage with target audiences or stakeholders. It is anticipated that we will attend 8 such events during the year but will provide flexibility to attend more if there are good opportunities and if this activity is demonstrated to have good impact and provide value for money.

8.8 Focusing communications

There are several key organisations we have identified as having an important role in providing information to farmers and with whom FAS will engage to ensure that farmers have good opportunities to hear about the FAS support. Key groups that FAS will seek to work with in this delivery year are:

- The National Parks- to ensure that the parks recognise the value of the Integrated Land Management Plans and that FAS services are promoted to tenant farmers.
- The Crown Estate- as above has an interest in ensuring that land is sustainably managed
- RPID offices- these are often one of the first interactions a new entrant to farming will have, through this conduit we have a great opportunity to promote the support available
- Banks and financial institutions- organisations lending to the agricultural industry have an inherent interest in ensuring the sustainability of the businesses in which they invest.

9 Providing Added Value

During 2019, Ricardo will pilot the delivery of Stakeholder Group meetings. The meeting is an opportunity to promote an industry-wide understanding of what FAS can offer and to identify means by which stakeholders and FAS can work together to mutually support farmers. There are many excellent initiatives and networks within agriculture such as the Monitor Farms Programme, QMS Benchmarking Groups, Innovative Farmers, and actions via individual stakeholders. We have the opportunity through this forum to learn from each other, identify where we can better collaborate and provide a more seamless journey for farmers as they navigate the support networks.

Organisations invited to attend the meeting include; NFUS, Scottish Land and Estates, NBE, NSA, STFA, QMS, SAAVA/CAAV, Lantra, RSABI, Soil Association, Industry Champions, AIC, AHDB, SAOS. Following the initial pilot in January 2019 and in consultation with the group it is proposed that the group reconvene on a quarterly basis.

10 Advice Line

The Service (one-to-one and one-to-many) will continue to operate with a single advice line number (0300 323 0161) and email address (advice@fas.scot). This has worked well and provides customers with a one-stop-shop for farm advice.

The advice line offers a tiered service, providing direct escalated access to a range of experts with the necessary technical knowledge to answer questions across all subject areas covered by FAS.

All technical queries are responded to by Ricardo's *Tier 1* operative. The operative will answer queries where they can or provide signposting if appropriate. However, if the enquiry is of a complex nature, the call will be escalated to a technical advisor (as identified by a skills matrix). This process ensures that seamless, complete technical support is provided in a fast and cost-effective manner. Calls are recorded in the CRM database for reporting and QA purposes.

The service has worked well to date. The Ricardo team are comfortable dealing with the calls and our task now is to ensure the staff are kept as up to date as possible and well briefed on any changes.

11 Database

Ricardo will continue to maintain a database:

- To track customer information so we can clearly understand who has engaged, how they have accessed the service and what support they have received (Advice Line, visit, etc)
- To manage the progression of each scheme. The management process and the CRM database will be designed to ensure that each check is complete before payment may move on to the next step.
- For each scheme there are specific checks that must be completed at each stage of the process. For example:
 - On receipt of the application we will check the eligibility of the farmer/crofter to receive the funds. That they have a BRN number and that they do not receive in excess of: 1 ILMP, 2 Specialist Advice visits, 4 days of mentoring in total; or 1 Carbon Audit per year
 - Check that the proposed funding of an ILMP is not in excess of £1,200 or more than 80% of the overall cost of the advice.
- Check that we have received a signed acceptance of the offer before the visit goes ahead.
- We will use our database to forecast claim data. Our portal will be specifically designed to meet the detailed data requirements. We will build in reports to identify data that is incomplete
- All technical queries will be responded to by the helpdesk will be recorded in the database for reporting and quality assurance purposes

12 Scheme Delivery

The One-to-One FAS service comprises three elements:

- ILMPs & specialist advice;
- Mentoring of new farmers; and
- Carbon audits.

Figure 4 Diagram to show the components of one-to-one advice



13 Integrated Land Management Plans

The Scottish Government, through the Farm Advisory Service (FAS), offers funding to help Scottish farmers and crofters access expert consultancy support to develop a professional, Integrated Land Management Plan tailored for their farm or croft.

Why is an ILMP important?

- Provides professional advice to support decision making.
- Reviews the business to make sure it is in the best shape to deal with future uncertainty.
- Provides a clear route map to take the business to the next level.

The purpose of ILMP is to provide a holistic review, incorporating environmental, financial and other public good components into the business advice provided. The ILMP is an integrated plan that is specifically tailored to meet the wide-ranging requirements of the individual farm business or crofts.

The ILMP is structured to ensure that each plan fully integrates all the components of sustainability and provides a balance in focus between **environmental** and **economic** performance and delivering **public good** benefits. But is flexible to cater for the diversity of farms and crofts, the challenges they face and the variance in business size and complexity.

The aim is that the structure of the ILMP provides the template and prompts to ensure advisers are triggered to include all relevant information, there are core elements that should be consistent across all plans, but to avoid being overly prescriptive. Accredited advisors will review the enterprise and consult with the farmer/crofter to develop ILMP's which focus on areas of greatest relevance to the individual business.

The core components of the ILMP are:

- Vision statement for the farm business or croft
- Objectives of the plan

- Summary of actions
- Farm Map
 - Identification of natural assets and environmental features (including soil mapping)
 - Woodland area
- Business and natural resource review
 - Business structure
 - Enterprise information
 - Soil and nutrient management review
 - Biodiversity and conservation review
 - Financial statement
 - Enterprise analysis (GM)
 - Technical performance of enterprises (This could include, health and welfare, crop health and management etc)
 - Cross Compliance and Greening
- SWOT analysis and options appraisal
- Conclusions, actions and implementation plan

ILMPs are delivered by advisors accredited to the Farm Business Adviser Accreditation Scheme Scotland.

Grant assistance towards 80% cost of the ILMP (to a maximum of £1,200) is paid by the Farm Advisory Service direct to the adviser's company on evidence that the work has been completed.

The programme will deliver up to 300 ILMPs per annum, each plan will require on average 2 days of advice. At a cost of £1,200 per advice/plan, budget of £360k per year.

The ILMP will signpost opportunities for the farmers/crofters to gain more in-depth advice via the Specialist Advice.

14 Specialist Advice

Farmers, crofters and land managers who have received an Integrated Land Management Plan (ILMP) through the Farm Advisory Service can choose to benefit from up to two further specialist advice plans during the period 2016-2020.

While an Integrated Land Management Plan must be completed by an adviser accredited under the Farm Business Adviser Accreditation Scheme for Scotland (FBAASS), there is more flexibility when selecting the adviser to deliver specialist advice.

A requirement of the scheme is that the specialist adviser is appropriately qualified to deliver this advice. This is defined as the adviser having relevant academic or professional qualifications (for example, membership of relevant chartered association) and at least 4 years of experience delivering advice in this area. To provide evidence of this, a copy of the chosen adviser's curriculum vitae (CV) or a record of appropriate experience gained while working with farmers in the specialist area (including professional accreditation) must be sent to the Farm Advisory Service for approval

Grant assistance towards the cost of the specialist advice is paid by the Farm Advisory Service direct to the adviser's company on evidence that the work has been completed.

14.1 Grant rates

The table below details the topics and funding available:

Topic of advice	Funding available	% of overall costs that may be covered*
Climate change adaptation and mitigation	Up to £1,000	100%

Soil and nutrient management	Up to £1,000	100%
Biodiversity, habitat and landscape management	Up to £1,000	100%
Woodland management and conservation	Up to £1,000	100%
Water pollution prevention and control	Up to £1,000	100%
Organics	Up to £1,000	100%
Archaeological and historic site advice	Up to £1,000	100%
Animal Welfare	Up to £1,000	100%
Farm business efficiency	Up to £800	80%
Succession Planning	Up to £800	80%
Feed budgeting	Up to £800	80%

Excluding VAT, except for businesses that are not registered for VAT and will not reclaim the VAT from HM Customs & Excise, in which case the grant will be based on the total cost including VAT.

14.2 RSABI Hardship Process

It has been identified that in a few cases specialist Hardship support from FAS would help provide support quickly and allow access to Scottish Government funding for the most vulnerable in the sector.

To provide timely and appropriate support to farmers in this situation it has been agreed that farmers identified by RSABI as requiring hardship support may receive specialist advice on business efficiency or animal welfare without the requirement to have previously undertaken an Integrated Land Management Plan (these are the only exclusions to this rule).

14.2.1 Eligibility:

As well as requiring the farmer or crofter to have a BRN number, an assessment from RSABI would be required to confirm hardship. RSABI would follow its normal procedure for this, conducting a visit and completing an internal application form.

14.2.2 Referral process:

In the case that RSABI have reviewed a case and agreed that FAS support is required RSABI will refer the case to FAS.

RSABI will work with the applicant to complete the FAS application form (calling on FAS if assistance is required with this). The completed form will be submitted via the normal route to advice@fas.scot however RSABI will also alert the Project Manager, Caroline Wood on Mobile: 07968707248 | Tel: 01235 753310| E-mail: CarolineE.wood@ricardo.com who will ensure the application is dealt with as a first priority and will keep RSABI informed on progress.

The applicant is, as with the current scheme, able to choose their own FBAASS accredited adviser to deliver the specialist support, however if time is an urgency, Ricardo can intervene and put a call out to all FBAASS advisers to identify which advisers have availability and can deliver within a set timeframe (as indicated by RSABI).

14.2.3 The grant process:

The current scheme rule would apply. Farm Advisory Service would undertake to complete the approval process within a 5-day timescale.

14.2.4 Grant rates:

The Farm Advisory Service will pay the adviser business 80% of the cost of a “hardship” Specialist Plan up to a maximum of £1,000 per plan. As the grant does not cover the full cost of the service, the applicant will be required to pay the balance of the cost and the VAT element of the service. If the applicant qualifies for financial assistance from RSABI, then RSABI will pay for the balance and the applicant pays the VAT element.

14.2.5 Additional grant assistance:

The applicant will still be eligible for the full grant assistance that is available as per the current scheme guidelines, this includes the ILMP which has been by-passed on this occasion.

14.3 Process for administering ILMPs



14.4 Process for administering specialist advice



14.5 Updating guidance, templates and web content

Ricardo will continue to review and update the scheme guidance, application forms and web content to ensure they are current and fit for purpose.

Should there be any substantial changes to scheme criteria or delivery advisers will be notified by email and postal letter.

15 Carbon Audits

Carbon Audits are undertaken using the Agricultural Resource Efficiency Calculator (AgRE Calc).

All FBAASS advisers have received training on how to use the Carbon Calculator and guidance and templates for the delivery of the report and for advisers new to the process there is extensive training available on the adviser training portal <http://sfas.ricardo-aea.com/>

Up to 250 carbon audits will be delivered this year. The carbon audits provide value to both the beneficiary and Scottish Government. The beneficiary will benefit from a resource efficiency audit that will lead to economic savings and environmental benefits at a farm level. It will also provide an evidence base for Scottish Government, providing quantified GHG emissions reduction potential for farms that can inform how future policy can be shaped to meet GHG reductions commitment.

In addition to this general awareness, farmers/crofters need specific advice on the steps they can take to reduce their GHG emissions, to improve the efficiency of their resource use, to help lock carbon into the soil, grow trees to sequester carbon from the atmosphere, to maintain peatlands and to use their land for development of renewable sources of energy. Many produce buyers and retailers are asking farmers and growers to demonstrate their green credentials. Therefore, there are clear economic, environmental and reputational advantages for farmers and crofters to monitoring and reducing carbon foot print. One way of achieving this is through a carbon audit.

15.1 Process for administering carbon audits



16 Mentoring for new entrants

The average age of farmers is increasing and insufficient opportunities exist to attract the numbers of new entrant farmers that the industry needs. This is a problem across Europe. It is a clear priority for SG to support generational renewal in agriculture in Scotland. Scottish farming needs to attract a steady flow of new entrant young farmers with drive, innovation and entrepreneurial skills.

In September 2012 the Scottish Government set up a New Entrants Advisory Panel. The Panel advises Government on the future role of support for new entrants. There has been active engagement with the Panel to explore what further or different articles could be introduced in the SRDP to remove barriers to entry and /or incentivise new entrant young farmers into the industry. a range of interventions were suggested by Panel one of which was mentoring.

It is widely recognised that all professionals, wherever they are in their career, can benefit from having a mentor. However, there are more significant benefits for new entrants to receive mentoring support during their first few years after qualification, having taken on land or a tenancy or when receiving grant support. Therefore, another advisory component for FAS one-to-one advice programme will be mentoring for new entrants.

Mentoring support helps new entrants establish profitable and sustainable businesses. New entrants benefit from being paired with an experienced farmer in their sector, who can provide tailored support and advice on how to manage set up and grow the new farm or business. Typical skills that mentors offer include experience of running a farm business, traditional skills (e.g. stone walling and hedge laying), and food and drink industry experience.

The programme will seek to support 60 mentees per year.

16.1 Process for recruitment of mentors

Mentors are recruited through stakeholders and the recommendations of our adviser network who between them have contact with a substantial proportion of the farmers, crofters and land managers in Scotland and an excellent knowledge of who the leading farmers are. It these personal contacts that are most potent in encouraging an experienced farmer to get involved and share his/her knowledge.

We also work in collaboration with Lantra who bring the experience of delivering the 'Get Mentoring' service and mentors working with the Get Mentoring service. There is not a single approach to recruiting mentors, the recruitment will usually involve personal engagement and introduction.

Ricardo ask interested mentors to complete a data collection form which collects information on the mentor to enable us to create a profile and to match their skills with mentees.

Mentors come from a wide variety of backgrounds and experiences but appropriate attributes include.

- A sound knowledge /experience of agriculture at a grass root level.
- A master of traditional skills eg stone walling, hedge laying etc.
- Land based educational/skills background.
- Food and drink industry.
- Finance/business planning.
- Surveying/planning.
- Knowledge of conservation and biodiversity
- Forestry or woodland skills

Mentors are paid an honorarium of £250 per day. No mentor is able to exceed more than £2K per annum (i.e. a maximum of 2 mentees.).

16.2 Process for recruitment of mentees

In recruiting mentors Ricardo will continue to work closely with the New Entrants to Farming Programme. In 2016 we sent a direct mail introduction to the mentoring support to all farmers who had come through the scheme in previous years. We will continue to work to engage this group and new entrants who receive support via the New Entrant Start-Up Grant (NESUG) and Young Farmer Start-Up Grant schemes (YFSUG).

The mentoring support will also be promoted through communications with stakeholders, the development of case studies promoting the value of the service and the circulation of these case studies and promotional articles with agricultural press and stakeholders.

16.3 Review of mentor guidance

Ricardo will continue to respond to feedback and will update mentoring guidance, application forms and promotional material as required throughout the year to ensure the benefits of the scheme are well communicated and the application process is clear and easy.

16.4 Process for administering mentoring



17 Quality Assurance

In order to ensure quality of service, a number of key performance indicators relating to service will be monitored and reported on.

Analysis of the feedback provided by farmers to date testifies that the quality assurance process is working and the support is high quality and well received:

17.1 Key Performance Indicators (KPIs)

Quality of advice

- Quality of advice: at least 85%, of feedback by advice recipients is classed as good or better (assessed from answers to relevant questions in feedback form (Land Manager Evaluation Form)).
- Relevance of advice: over 85% of advice recipients thought the advice given was relevant to their business (assessed from answers to relevant questions in the feedback form).
- Impact of advice: over 70% of advice recipients state they will use the advice provided to change their management practices (assessed from answers to relevant questions in the feedback form).
- Behavioural change: over 70% of recipients of advice stated that they have taken action as a result of the advice provided (assessed at ILMP review visit and potentially via SG evaluation survey).

Advice Line:

- Response time for routine queries - 90% within 1 working day.
- Response time for detailed queries (those requiring specialist input) - 90% within 2 working days.
- Response time for complex queries - 100% within 5 working days.
- Quality of advice: over 70% of advice recipients state that the service they received was excellent or good (assessed did this help question asked at the close of each call and potentially via SG evaluation survey).

17.2 Scope and responsibility

The Ricardo service manager will be responsible for ensuring that the QA procedures are adhered to and that the process is implemented and revised as appropriate. The Ricardo quality manager (Rebecca Barrett) will be responsible for managing the QA process in line within the procedures agreed with the Scottish Government.

17.3 Fund management

Ricardo will be responsible for the financial administration process working closely with the Scottish Government's finance team. In order to ensure all aspects of the financial management process will have a 'triple check' process. This means that before money can be drawn down each month into the independent bank account the funds will be requested by the grant manager, checked by the finance manager and approved by the service manager.

A monthly reconciliation will be conducted by the finance manager and the grant manager cross checking payments against the records in the CRM. This cross-checking will be conducted on a sample

of payments to ensure that 1) the payment was approved for payment 1) the necessary approvals were in place from Ricardo's finance manager, 2) the report was issued to the farmer/crofter and successfully passed the QA process, and 3) the required evidence was in place to authorise payment i.e. the invoice from the advisor to the farmer/crofter was correct and saved to the CRM.

The grant manager will report to the service manager any non-compliances which will either be logged in the QA report or in the case of a serious non-compliance will contact the Scottish Government immediately.

17.4 Advice Line

Within the delivery of the Service, Ricardo is responsible for manning the telephone and email advice line for SFAS. In order to ensure quality of service, a number of Service Level Agreements (SLAs) relating to service will be agreed with the Scottish Government at the inception meeting to be monitored and reported on throughout the contract duration. SLAs relating to:

- Response time for routine queries - 90% within 1 working day.
- Response time for detailed queries - 90% within 2 working days.
- Response time for complex queries - 100% within 5 working days.

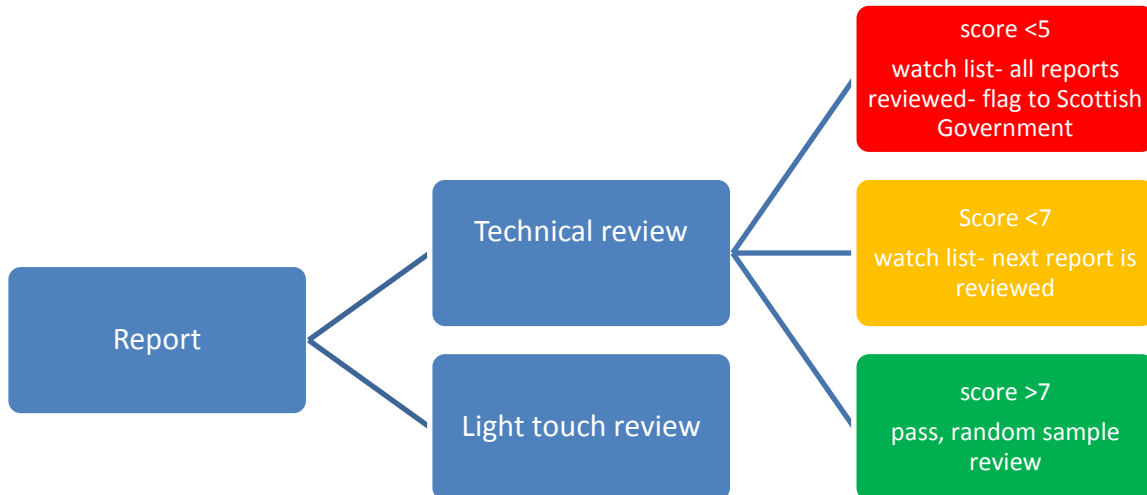
As a call or enquiry is received it is logged onto CRM. When the request is responded to it is then logged onto the CRM and the query closed out. The helpdesk manager will regularly run a report to identify any open queries and will follow up with the team should any queries be outstanding. – The CRM will therefore function as both the logging and tracking tool.

Should a call require technical support from an adviser or other external body the Advice Line will call the adviser to confirm that they will be able to respond to the call within the required time-frame (one working day), they will enter the details of the enquiry in the CRM and an electronic ticket will be issued to the adviser (by email). When the adviser has called back the customer they will complete the response field in the ticket with details of the time, date and response provided. This ticket is then returned to the Advice Line and automatically uploads to the database, closing-out the enquiry. The Advice Line manager will run a report on a weekly basis to identify any open tickets and will chase up any late responses. Should there be a valid reason for a response taking longer the customer will be kept informed.

The helpdesk manager will be informed of all complaints and will log details of the action taken and lessons learnt on a register. Following each complaint, the helpdesk manager and programme manager will review whether there is a need to provide further training or to modify Advice Line procedures. We do not expect complaints and each complaint will be taken very seriously. If a complaint concerns an FBAASS registered advisor, we will discuss the matter with Lantra seeking the earliest possible resolution.

17.5 ILMP Quality Assurance Process

A two-tiered QA process will be adopted involving both a 'light-touch' review operating alongside a 'technical' review which will incorporate a scored 'traffic-light' system.



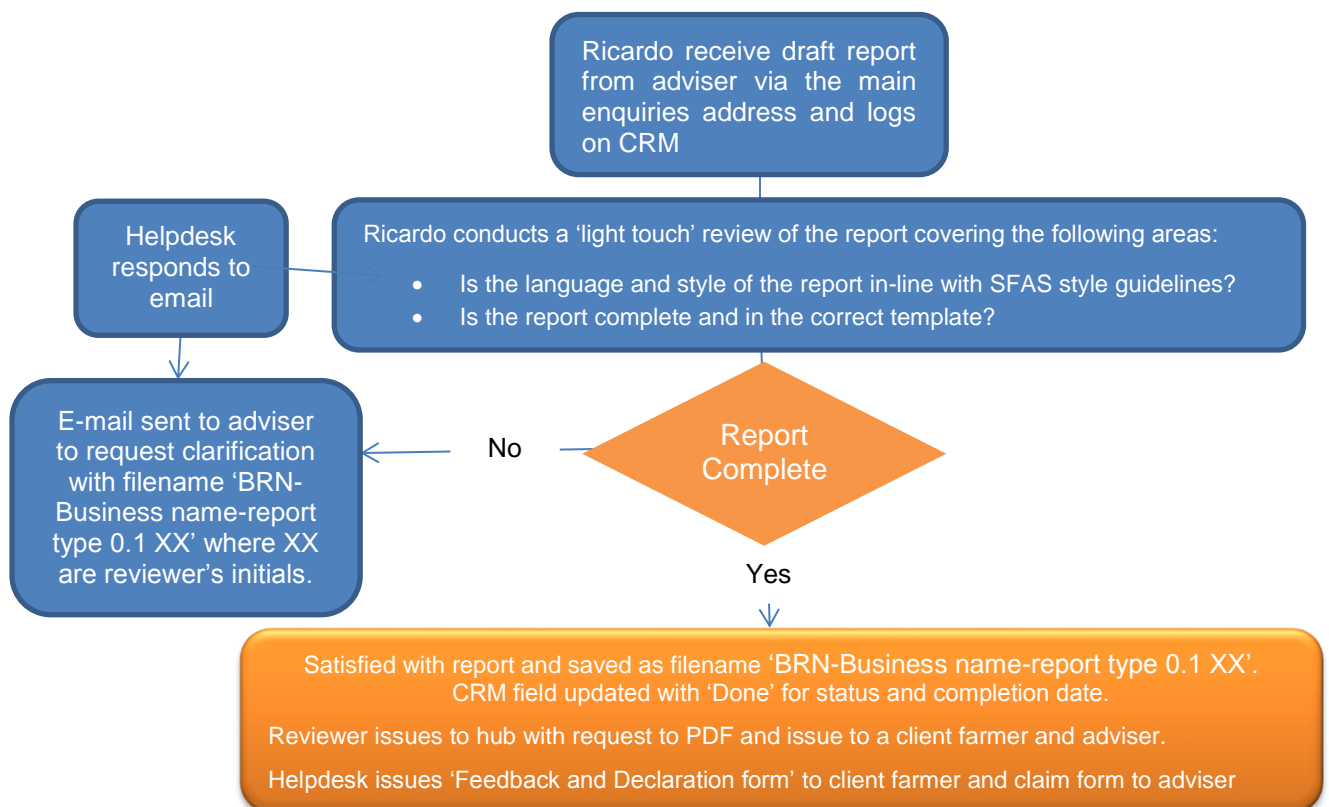
17.5.1 Light-touch QA process

Once received into the Hub via the advice@fas.scot address the Helpdesk team will log the report. Ricardo will then conduct a 'light-touch' review of the report as detailed in the diagram below and covering the following aspects:

- The correct template has been used and is complete;
- The clarity of presentation;
- Typographic errors; and
- Clarity in terms of grammar and language.

Once complete, the report will be saved to the CRM. Ricardo will send a pdf of the final report to the farmer and adviser simultaneously. The farmers will also be issued a 'Feedback and Declaration Form' and the adviser a claim form. The CRM will be used to track the time to conduct the 'light-touch' review and to ensure the time to review reports is kept to a minimum.

A flow diagram depicting the light-touch QA process is provided below.



17.5.2 Technical Review

Once received from the adviser, via the advice@fas.scot address, the Ricardo team will log the report onto the CRM. The first report from each adviser will be subject to an in-depth assessment. Following the first report, further reports will be either assessed at random or if the light touch reviewer raises concerns.

The 'technical accreditation' review will be much more detailed and will involve a 'deep-dive' into the quality of the technical advice as well as the 'softer' aspects of clear report writing.

The assessment will cover:

- Formatting, punctuation & grammar
- Readability
- Meeting the guidance; and
- Technical content and the extent to which a compelling case is made for adoption of the actions within the Plan.

Table 1 Guidance for Technical Review of reports (assessors' scoring).

Description	Technical Score	Description
Report clearly lays out how scope has been met	10	Technical advice provided appears to fully meets client requirements
Report meets scope but not fully described in report	9	Technical advice provided appears to substantially meets client requirements
Report meets scope but only partially described in report	8	Minor omission in terms of technical advice
Report doesn't cover one minor element of the scope	7	Significant omission in terms of technical advice
Report doesn't cover or describe why one significant element of scope wasn't covered	6	Major omission in terms of technical advice
Significant omission in terms of scope (e.g. primary focus of report not covered)	5	Wrong technical advice in one part of the report
Major omission in terms of scope (e.g. primary and secondary focus of report not covered)	4	Wrong advice throughout the report
Substantial omissions in terms of scope (i.e. majority not covered)	3	Serious technical errors in most of the report
Serious omissions in terms of scope (i.e. failure to address nearly everything)	2	Serious technical errors in all areas of the report
Nothing in report matches scope (i.e. none of the requested support provided)	1	Insufficient technical information in to allow any assessment (report generic not tailored to the client)

Peer reviewers are selected by Lantra. Peer reviewers are senior advisers who have been approved by Scottish Government to act in this capacity. Reports will be sent directly to the peer reviewer and Lantra will pass the comments back to Ricardo who will update the QA tracking sheet accordingly.

Recording

- All reports are logged onto the CRM and added to the QA tracking database.
- **Issues captured on a log will be used to help identify any quality or guidance issues – these will be shared as part of the consultation and needs analysis process that will inform future adviser training needs as per the training and accreditation will follow this annual activity cycle**



17.5.3 Quality Assurance

A record of which reports have been checked and any issues identified will be kept on the QA tracker database.

The peer reviewers will send comments to Lantra who in turn will send Ricardo a comprehensive report (see appendix 1) within 10 days of receipt. Ricardo who will forward to the Adviser. The Quality Manager will update the tracking sheet accordingly. The adviser will then have two weeks to update the reports and re-submit them to Ricardo. An explanation of the significant issues must be recorded and corrective actions agreed by both parties, and recorded.

If the score from the accreditation process is above 7 then the adviser will be able to continue to deliver ILMPs with only light touch review. If the first report scored less than 7, feedback will be shared on why the report was not of a high enough standard. The next report by the adviser will automatically be added to the accreditation review process. If this report achieves the required benchmark, then the adviser will be removed from the watch list. If not, then the adviser will be placed on a watch list where all future reports will receive a technical review. If their reports are consistently below standard and in agreement with the Scottish Government, then the adviser will not receive accreditation the following year and will be removed from the list of accredited advisers and will no longer be able to conduct the ILMP reviews.

17.5.4 SLA

- initial QA of reports - light touch – 3 working days
- Technical review – 10 working days

17.6 Complaints Process

The complaints process is detailed in the rules and procedure document sent with every offer letter.

The service manager (Caroline Wood) will be informed of all complaints and will log details of the action taken and lessons learnt on a complaint register. Following each complaint, Caroline and Becci Barrett will review whether there is a need to provide further training or to modify procedures. We do not expect complaints and each complaint will be taken very seriously. If a complaint concerns an FBAASS registered advisor, we will discuss the matter with Lantra seeking the earliest possible resolution. Should a complaint be substantive Caroline will immediately inform Anna Murray (Scottish Government) and will discuss Ricardo's proposed resolution. In the case of a severe misdemeanour this may involve removing an advisor's accreditation. Such a step would never be taken without the agreement of Scottish Government.

18 Managing Adviser Payments

1 Approach to managing flow-through funds

Ricardo have extensive experience of managing grant programmes and handling government funds and operate a variety of models depending on customer requirements. Ricardo will administer the payments directly to recipients on the Scottish Government's behalf. To ensure Ricardo is 'acting on behalf of' the Scottish Government who are awarding the grant, Ricardo operate a separate bank account with funds being drawn down into the dedicated bank account in accordance with financial profiling and follow the procedures outlined below.

We have developed this process to ensure the following:

- No monies are awarded without evidence of the work being completed or support being provided (evidence saved onto the CRM)
- All monies to be paid in arrears
- The monies are ring-fenced and separated from Ricardo's own accounts

9.1.1 Overview of the Financial Management Process

We have established a ring-fenced client bank account at Lloyds Bank in the or the Service's name to facilitate the flow of funds directly to advisors from the Scottish Government.

This programme account is discrete from the operational bank accounts of the Ricardo business and the funds that pass through the account will not be accounted or reported as company turnover. The bank account is under the control of a financial manager with payments authorised using established and agreed procedures that include dual consents to release payments by electronic transfer. Interest accumulated on this bank account is the property of the Scottish Government and will be repaid upon request or closure of the bank account.

The service manager is responsible for ensuring the following process is adhered to.

- Only authorise a payment to an advisor once we have received and quality assured both the:
 - visit report and
 - signed feedback and declaration form.

The Finance Manager's role is critical to providing an additional layer of review and oversight to ensure that the process is followed and any anomalies are identified and investigated.

Control and tracking of each transaction is managed through our CRM system. This in turn has a direct link with our Agresso accounting system. All requests for funding from the Scottish Government are

based on a draft **funding schedule** from the CRM system for transactions where the above criteria are met. No requests for funding will be made without review and approval of the Finance Manager and Service Manager.

9.1.2 Batch Funding

All claims that meet the above criteria will be batched into the draft funding schedule. A monthly reconciliation will be conducted by the Finance Manager and the Service Manager cross checking payments against the records in the CRM (visit reports, evaluation forms etc). This cross-checking will be conducted on a sample of payments to ensure that 1) the payment should have been made (reports issued and passed QA), 2) the required evidence was in place to authorise payment.

The funding schedule runs on an established 4 weekly cycle. Once approval is received the funding schedule is deemed final, and is automatically uploaded onto the Agresso system for payment. When the agreed funding is received from the Scottish Government, the subsequent payments to the advisors are initiated via a BACS payment.

Electronic copies of programme bank account statements can be provided at such intervals as Scottish Government requires or on request by e-mail. The programme account will be subject to audit by our internal and external auditors, and subject to any audit Scottish Government might wish to undertake.

The accounting system used by Ricardo (Agresso) is a top-tier, global accounting system well recognised within industry, specifically designed to handle large project and programme management funds. Agresso is compliant with the requirements of the National Audit Office, HMRC and the London Stock Exchange in the UK and the control of projects and transactions required by European funding.

This process has been developed and honed over many years with disbursements of public funds through this mechanism approaching £100 million paid out in a single year at the peak of activity. Our management of such bank accounts and funds has passed all scrutiny and audits by the funding Departments and the National Audit Office.

Whilst this process is our suggested approach other models are available. The outcome of this process is:

- A dedicated programme account administered on behalf of the Scottish Government
- Robust double and triple-checks ensuring accurate payments of transparency
- A simplified approach for the Scottish Government only requiring one monthly payment

However, this process does limit our ability to make ad hoc payments to advisors or to expedite the process by making payment runs bi-weekly to reduce the time an advisor (predominantly a small business) has to wait to be paid. This could be nearly 8 weeks if the advisor sends an invoice just after the previous funding schedule has been raised.

19 Monitoring and Evaluation

Feedback from customers will be collected after the delivery of each advice activity via the 'Feedback and Declaration Form'. No advice visit will be closed out for payment until this form is received. Through review of this data we will seek to understand the perceived value of advice and measures farmer/crofter intends to implement. This data will provide valuable insight into where improvements can be made to the service or internal processes, which we will seek to implement to continually improve and enhance our delivery.



Ricardo
Energy & Environment

The Gemini Building
Fermi Avenue
Harwell
Didcot
Oxfordshire
OX11 0QR
United Kingdom

t: +44 (0)1235 753000
e: enquiry@ricardo.com

ee.ricardo.com