



Ricardo  
Energy & Environment



## One-to-one Farm Advisory Service

2023/24 Business Plan for Scottish Government

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

Farm Advisory Service

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## Executive summary

This document presents the plans for the delivery of the One-to-one Farm Advisory Service (FAS) from 1st April 2023 to 31st March 2024. The plan provides businesses with the stability of a familiar FAS structure supporting farmers, whilst innovating and continuing to evolve the service to address future challenges.

There is widespread recognition that a significant shift is needed in how we approach agriculture and land management if we are going to meet Scottish Government's commitment to net zero by 2045, tackle the loss of biodiversity, maintain per capita food production, and have an economically viable rural economy.

This requires farmers to be motivated to act and advisers to have the skills to support them. This business plan is developed with an understanding that the one-to-one service provides an excellent and robust delivery mechanism to achieve these requirements. The current delivery of FAS is proven with excellent quality of the service providing a well-respected and well trusted experience:

- 98% of users rated the ease of access to information as excellent or good
- 99% of users rated the helpfulness at initial contact point as excellent or good.
- 96% of respondents would recommend the service to others.

We are committed to continuing to maintain and build on the quality of this delivery whilst also offering a greater focus in 2023 is on providing:

- Closer links to research bodies in training delivery to promote more rapid conveyance of new information to farmers.
- Ensuring advisers have the skills, support, and training to address priority climate focused demands and to provide further support to address the mental health issues identified as being broad spread in the agricultural sector.
- Communications and engagement activities to inspire and energise action from farmers/crofters

In response to this need, this business plan focuses on two key areas: training for emerging priorities and communications to engage farmer and crofter in action against all relevant SG priorities.

### *Training*

This business plan invests in more significant adviser training and support than ever before, providing; one-day CPD accredited climate ready adviser training open to all advisers- working with sector specialists; government and NGOs to determine content and deliver; a certified half day mental health first aid awareness training- working with RSABI and their providers IED; alongside up to 6 additional CPD accredited training meetings delivered across the year.

### *Communications*

In 2023, we present a robust marketing plan focused on motivating and inspiring farmers/crofters and land managers to take up the support and act upon the advice. This involves reviewing and evolving the language used to describe the services on the website and more focus in articles, direct mail and public relations to ensure that the target audience know what is on offer, are inspired to act and fully appreciate the benefits it offers to them.

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# 1 Introduction

## 1.1.1. Purpose of the service

This document presents the plans for the delivery of the One-to-one Farm Advisory Service (FAS) from 4th April 2022 to 31st March 2023. The plan provides businesses with the stability of a familiar FAS structure supporting farmers through a period of significant uncertainty and change, whilst innovating and continuing to evolve the service to address future challenges, in particular the Scottish Government target for net-zero greenhouse gas (GHG) emissions by 2045, and reduction of 75% by 2030.

The One-to-One contract facilitates access to high quality one-to-one advisory support. This includes advice to: improve biodiversity; increase awareness of habitat and carbon sequestration benefits of woodland planting; promote climate change adaptation and mitigation opportunities; improve business management and efficiency; encourage inclusivity by supporting new entrants and women in agriculture; and helping to support the industry and Scottish government to evolve to meet future challenges.

## 1.1.2. Scope of the Service

The demands on the agricultural sector are changing rapidly and with this the support and advisory needs of the sector. The challenges are manifold, we need production to be delivered in a manner that supports and improves biodiversity through reducing pollution risk and providing habitat; reduces climate change risk through successful adaptation and sequestration and reduced GHG emissions. Supporting diversity and responding to business challenges including the war in Ukraine, Covid, post-EU exit trading, cattle EID, encouraging new entrants to the industry while supporting the aims of the Good Food Nation Act must all be a focus. These aims include, among others, that everyone in Scotland has ready access to the healthy, nutritious food they need, and Scottish producers are ensuring that what they produce is increasingly healthy and environmentally sound. Farmers' activities may interact with many policies and strategies such as the biodiversity, forestry and pollinator strategies, Cleaner Air for Scotland Strategy, the National Peatland Action Plan, Scotland's tourism strategy, local food strategies to name but a few. Specifically for the farming sector, the new Scotland Agriculture Bill is currently being consulted on.

The current FAS is founded on the basis of article 15 of Regulation (EU) No 1305/2013 of the European Parliament and of the Council on support for rural development by the European Agricultural Fund for Rural Development. These regulations were brought into UK law on 31 December 2020 under the European Union (Withdrawal) Act 2018 and amended using the powers contained in that Act to ensure their continued operability following the UK's departure from the EU. The FAS must continue to align with the stated rural development priorities:

- Fostering knowledge transfer and innovation in agriculture;
- Enhancing the viability and competitiveness of all types of agriculture, and promoting innovative farm technologies and sustainable forest management;
- Promoting food chain organisation, animal welfare and risk management in agriculture;
- Promoting resource efficiency and supporting the shift toward a low-carbon and climate resilient economy in the agriculture, food and forestry sectors;
- Restoring, preserving and enhancing ecosystems related to agriculture and forestry;
- Improving economic and efficiency performance.

In particular the FAS is focused on promoting:

- Low and no cost ideas to help farmers identify, support and improve biodiversity on their land;
- Awareness of the benefits of woodland planting for businesses, carbon sequestration and habitat;
- How businesses can manage carbon on their farm and adapt to a changing climate, making their business more resilient to future changes;
- Resource efficient farming, using data and benchmarking as well as responding to specific challenges including Covid, post-EU exit trading, cattle EID and carbon neutral farming;

- Promoting inclusivity, supporting new entrants to the sector and women in agriculture.
- New Government policies and supporting businesses through challenges or unforeseen issues.

However, it is noted that the increased demands of farmers require a shift in the way advice is delivered, requiring better integration, and sharing of information between policy makers, farmers, researchers, NGO's and advisors. This plan takes steps within the current delivery model to start to realise some of these ambitions, by focusing on the skills development advisers and involving research and policy in setting the agenda. Concurrently, Scottish Government are carrying out an options appraisal for the future AKIS (Agricultural and Knowledge and Innovation System) which will be aligned with European policy. This will inform the future shape and focus of the FAS.

## 2 The focus in 2023

There is widespread recognition that a significant shift in how we approach agriculture and land management is needed to meet Scottish Government's commitment to net zero by 2045, tackle the loss of biodiversity, maintain per capita food production, and have an economically viable rural economy.

This requires farmers to be motivated to act and advisers to have the skills to support them. This business plan is developed with an understanding that the one-to-one service provides an excellent and robust delivery mechanism to achieve these requirements. The current delivery of FAS is proven with excellent quality of the service providing a well-respected and well trusted experience<sup>1</sup>:

- 98% of users rated the ease of access to information as excellent or good
- 99% of users rated the helpfulness at initial contact point as excellent or good.
- 96% of respondents would recommend the service to others.

We are committed to continuing to maintain and build on the high-quality delivery of the current one to one service whilst also offering a greater focus in 2023 on providing:

- Closer links to research bodies in training delivery to promote more rapid conveyance of new information to farmers.
- Ensuring advisers have the skills, support and training to address climate focused demands and to provide further support to address the mental health issues identified as being broad spread in the agricultural sector.
- Communications and activities to inspire and energise action from farmers/crofters

In response to this need, this business plan focuses on two key areas: training and communications

### *Training*

This business plan invests in more significant adviser training and support than ever before, providing; one-day CPD accredited climate ready adviser training open to all advisers- working with sector specialists; government and NGOs to determine content and deliver; a certified half day mental health first aid awareness training- working with RSABI and their providers IED; alongside up to 6 additional CPD accredited training meetings delivered across the year.

### *Communications*

In 2023, we present a robust marketing focused on motivating and inspiring farmers and land managers to take up the support and act upon the advice. This involves reviewing and evolving the language used to describe the services on the website and more focus in articles, direct mail and public relations to

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<sup>1</sup> Feedback is required from all users of the service before a grant is closed out (100% of users of the service), this evidence has been compiled to give the above statistics.

ensure that the target audience know what is on offer, are inspired to act and fully appreciate the benefits it offers to them.

### 3 Key deliverables

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

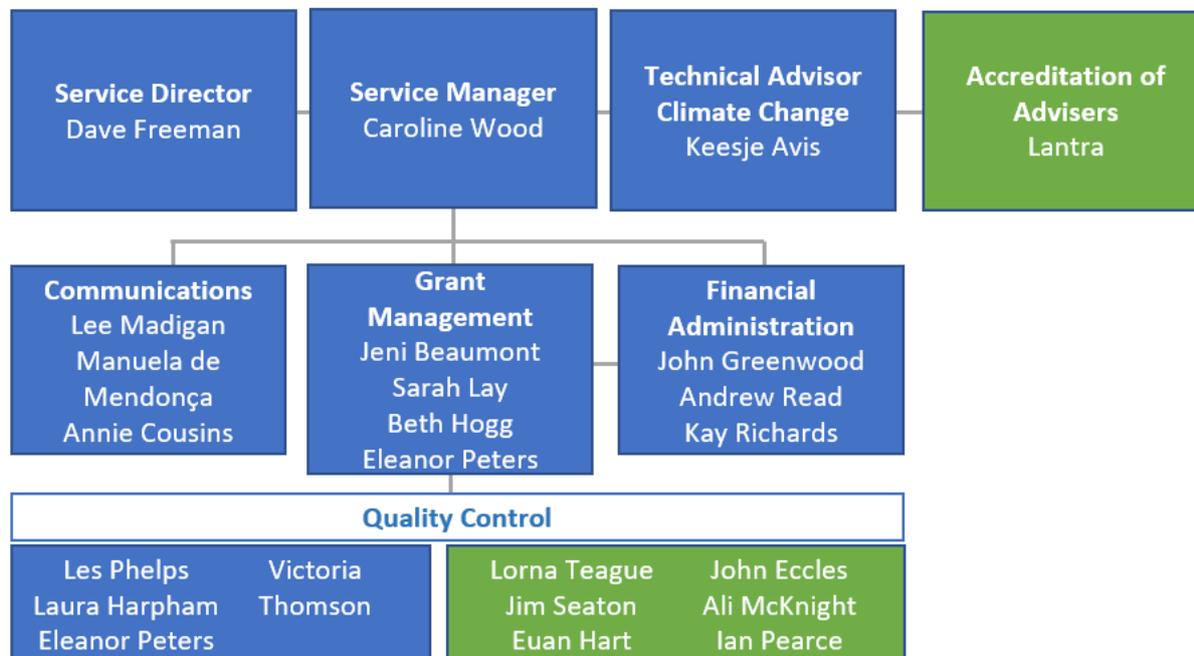
	ANNUAL DELIVERABLES	ADDING VALUE
REPORTING AND MEETINGS	Monthly Reports (12)	<ul style="list-style-type: none"> <li>Committed to providing accurate and transparent management information to support Scottish Government decision making.</li> <li>Proactive in seeking feedback on how we are doing to inform the continued development of the service. We understand that needs change and seek to innovate and ensure we have good foresight and the ability to evolve the service ahead of the curve.</li> </ul>
	Annual Report (1)	
	Bimonthly review meetings (x6)	
	Steering Group meetings (x4)	
SERVICE DELIVERY	ILMP's delivered (x300)	<ul style="list-style-type: none"> <li>Our team of professional grant managers are dedicated to ensuring a customer focused delivery. Key to this is providing a friendly and prompt response to applications and enquiries.</li> <li>Experienced team with documented processes for each step.</li> <li>Accurate tracking of data and modelling of uptake to enable us to identify future promotional needs or to provide an early flag to Scottish Government potential areas where demand will exceed targets.</li> </ul>
	Specialist Advice (x100)	
	Carbon Audits delivered (x250)	
	Mentoring delivered (x60)	
ACCREDITATION AND QUALITY ASSURANCE	Lantra accreditation of 100 advisers	<ul style="list-style-type: none"> <li>Peer to peer recommendation is highly influential in agriculture and quality speaks for itself. Ricardo are committed to ensuring that all work delivered by the service is to a standard we are proud of and is beyond the minimum requirements of our own and SG quality standards</li> <li>Ricardo will work closely with Lantra to ensure accreditation standards for FBAASS advisers.</li> </ul>
	All ILMPs peer reviewed	
	All reports quality reviewed	
	4 Meetings of Quality Review Panel	
PERSONAL AND FINANCIAL DATA MANAGEMENT	12 Adviser pay-runs per annum (4 weekly cycle)	<ul style="list-style-type: none"> <li>Ricardo has developed a bespoke customer relationship management system for the FAS. This enables us to track all customer interactions with the programme and to provide prompt and accurate reporting to Scottish Government on all aspects of the programme; grant status; applicant information such as sector; farm size; performance feedback; and metrics on uptake of each service.</li> </ul>
FINANCIAL DATA MANAGEMENT	Accurate data on grants applications and progress	

		<ul style="list-style-type: none"> <li>• Scottish Government has the reassurance that personal information is held in compliance with Data Protection Regulations in locked-down folders and password protected systems.</li> <li>• Scottish Government has the security of knowing that through payments of funds are managed by a professional finance team with audited systems; verifying the accuracy of data and checking the</li> </ul>
MONITORING & EVALUATION	Feedback from advice recipient, analysed and reported	<ul style="list-style-type: none"> <li>• We seek to continuously improve the service. The feedback from each user is reviewed and lessons learnt identified which are used to refine our processes and feed into our training programme.</li> </ul>
TRAINING & DEVELOPMENT	Presentations and training (x6 topics) Training events (x6) E-newsletter (x4)	<ul style="list-style-type: none"> <li>• Ricardo uses a range of techniques from training events to update communications to ensure advisers delivering the programme have the information and support they need to deliver to their best.</li> <li>• Ricardo will deliver a flexible training programme to we respond to changing needs of the programme and needs identified through stakeholder engagement and programme evaluation.</li> </ul>
Marketing	Web review (x1) Video case studies (x5) Press releases and feature articles (x12) E-tool kit to stakeholder contacts (x4) Social media updates (x24) Direct Mail/E-mail (x4) Attendance at stakeholder meetings, and events (x6)	<ul style="list-style-type: none"> <li>• Ricardo will continue to identify new opportunities to promote the service and optimise customer uptake. The mix of activities proposed have proved to have the most impact and importantly feed into and provide consistency with the One-to-many activities, enabling consistency across the programme. The mix of video, podcast or written content will be reviewed to ensure the most appropriate deliver to target audiences.</li> <li>• Targeting of communications will be informed by our understanding of key priorities for government and a review of current uptake to ensure we are continuing to drive demand where it is needed.</li> </ul>

# 4 Contract Management

## 4.1 Team Structure

Figure 1 Team Structure



Our governance structure comprises:

- 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. We can confirm that Caroline will be available for the duration of the contract.
- The Service Director, Dave Freeman as second point of contact for the Scottish Government and an adviser available to support Caroline should the need arise.
- Technical Adviser Keesje Avis, who will provide technical input on Climate Change. Keesje will be supported by Ricardo's in-house technical team and overseen by Dave Freeman and Caroline Wood, who provide additional technical and policy oversight to deliver effective support to the Scottish Government.

The governance structure provides:

- An experienced team who follow documented internal processes for effective management and consistently high quality delivery to customers.
- Effective stakeholder engagement and integration with work delivered by the one-to-many programme.
- Excellent technical and policy oversight and quality assurance.

### 4.1.1 Our approach

We focus on key ingredients to deliver an outstanding service.

- **Efficient grant management and administration** - Ricardo understands the importance of providing a first class service to safeguard the reputation of the programme. We offer a team with significant experience having previously managed this process for Scottish Government since 2016. We will focus on providing:
  - Clear and professional communications and web information
  - Helpful and engaging customer support
  - Quick processing of applications and communication of next steps.

- **Robust financial management** - Grant monies will be held securely and managed in accordance with stringent procedures. Ricardo has an expert financial team with established processes to deliver this service for Scottish Government.
- **Providing climate change expertise** - Keesje Avis has joined the project team to provide expertise and training in this vital and growing area of support need. In addition, we are supported by the wider agriculture team, offering a comprehensive and integrated package of environmental services related to climate policies and practice, agricultural policy, productivity, soils, water and air and biodiversity. We can further call on the expertise of colleagues across Ricardo working on air quality, energy, net zero, climate change, water and waste.
- **Flexibility in our approach** - Ricardo will maintain regular dialogue with government and stakeholders to identify and agree the changing needs of the sector including identification of capabilities required from advisers.
- **Training of advisers** - Ricardo will use our in-house expertise supplemented by recognised experts to provide training to advisers. This will expect a focus of climate change mitigation and adaptation but will allow flexibility and adaptability as government and sector priorities emerge.
- **Engaging the industry** - Stakeholder engagement is a key to the integration of advice. Ricardo will facilitate this by developing a strong interface with the SG departments, NDPBs and NGOs who operate within the agricultural sector.<sup>2</sup>
- **Accreditation and verification of advisers** - To ensure high standards of advice, Lantra will deliver Farm Business Advisor Accreditation Scheme for Scotland (FBAASS) services for ILMPs, business advice and carbon audits. Other specialist areas be will individually assessed based on experience, education and training. We will use a detailed skills matrix to ensure the correct capability within the delivery team.
- **Quality Assurance is a priority for Ricardo** - to provide consistently high-quality advice all reports will be reviewed and have to meet our quality standards.

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<sup>2</sup> Including the Scottish Government Rural Payments and Inspections Division; the Scottish Rural Network; NatureScot; RSPB; Scottish Crofting Federation; Lantra; SEPA; Scottish Forestry and Land Scotland; Historic Scotland; National Parks; the Crofting Commission; National Farmers' Union Scotland; Scottish Land and Estates; Quality Meat Scotland; Scottish Agricultural Organisation Society; Agriculture and Horticulture Development Board; and the Soil Association.

## 5 Reporting and Communications

### 3.1.1 Formal communication routes

- **Monthly reports** will detail the milestones achieved, metrics of delivery to date, plans for the next month, highlights and issues. Any issues will be updated on the shared FAS actions and issues log. 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 applications approved during the month.
- **Annual 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.
  - **Bimonthly Meetings.** Ricardo will attend management meetings to jointly review delivery and performance, scheme uptake, feedback and outcomes achieved. The management group will discuss any issues and agree actions.
  - **Steering Group Meetings.** Ricardo will provide service related input at these meetings.
  - **Stakeholder Group Meetings.** Ricardo will work with SAC to support 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 currently included are AHDB, QMS, Soil Association, Women in Agriculture, RSABI, CAAV/SAAVA, Lantra, AIC, NFUS, Scottish Beef Association, Scottish Land and Estates, Scottish Crofting Federation, SAOS, National Sheep Association, Agricultural Champions, RSPB, Dairy Hub, Scottish Tenant Farmers Association, Scottish Association of Young Farmers Clubs, Forestry and Land Scotland, Land Commission. This group can and will be extended if there are others who have an interest in attending.

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 Adviser Skills

To ensure the quality of advisory support, the Service requires that Integrated Land Management Plans and Carbon Audits are delivered by advisers who are FBAASS accredited (Farm Business Advisor Accreditation Service Scotland). Due to the very broad range of skills and experience required in the delivery of the specialist advice this delivery is not limited to FBAASS advisers. It is required that Ricardo verify on an individual basis if advisers have the required level of education and professional experience.

### 6.1 Accreditation of FBAASS Advisers

Advisers delivering ILMPs and Carbon Audits must be FBAASS accredited. Lantra manages this process and reaccrredit advisers on an annual basis. Lantra will ensure a wide coverage of advisers to avoid gaps in capability or geographical coverage. Lantra actively promotes FBAASS accreditation, targeting advisers with a strong reputation.

Lantra work independently to manage this accreditation process and reaccrredit advisers on an annual basis. In reaccrrediting Lantra will take into account evidence of ILMP reports that they have reviewed during the previous delivery year. If an adviser is new to the programme or has not delivered an ILMP within the year then they will be required to provide further examples of their work for resubmission.

In addition to evidence of work, Lantra also stipulate that each adviser must demonstrate continued learning and gain 20 CPD points during the year.

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 actively promote FBAASS accreditation to advisers and specifically target advisers who have a reputation for delivering high quality services. 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 reviews identify a need to recruit more advisers Ricardo and Lantra will work to fill the gap.

#### 6.1.1.1 Quality Assurance

Ricardo provides a fully trained team supported by thorough quality control mechanisms. The service manager is responsible for ensuring that the QA procedures are adhered to.

With a pool of advisers delivering the service, it is important that each report meets our quality standards. Ricardo implements the following process:

All ILMPs are peer reviewed by a panel of experts, all other reports are reviewed in-house by Ricardo. Ricardo works to a review turnaround of <10 days. The reviewers provide a comprehensive report. If revisions are required, the adviser has two weeks to update the reports and re-submit. Details of issues, and corrective actions agreed are recorded.

Technical Score	Description
10	Technical advice provided appears to fully meet client requirements
9	Technical advice provided appears to substantially meet client requirements
8	Minor omission in terms of technical advice which does not substantively affect the business.
7	Minor omission in terms of technical advice which affects the business and should have been identified and explored within the report.
6	Significant omission in terms of technical advice which affects the business and should have been identified and explored within the report.
5	Major omissions in technical advice in one part of the report which could have a significant effect on the business.
4	Inappropriate advice in one part or throughout the report which is clearly identifiable from the evidence presented in the report.
3	Serious technical errors in most of the report
2	Serious technical errors in all areas of the report
1	Insufficient technical information in to allow any assessment (report generic not tailored to the client)

Table 1 The scoring criteria

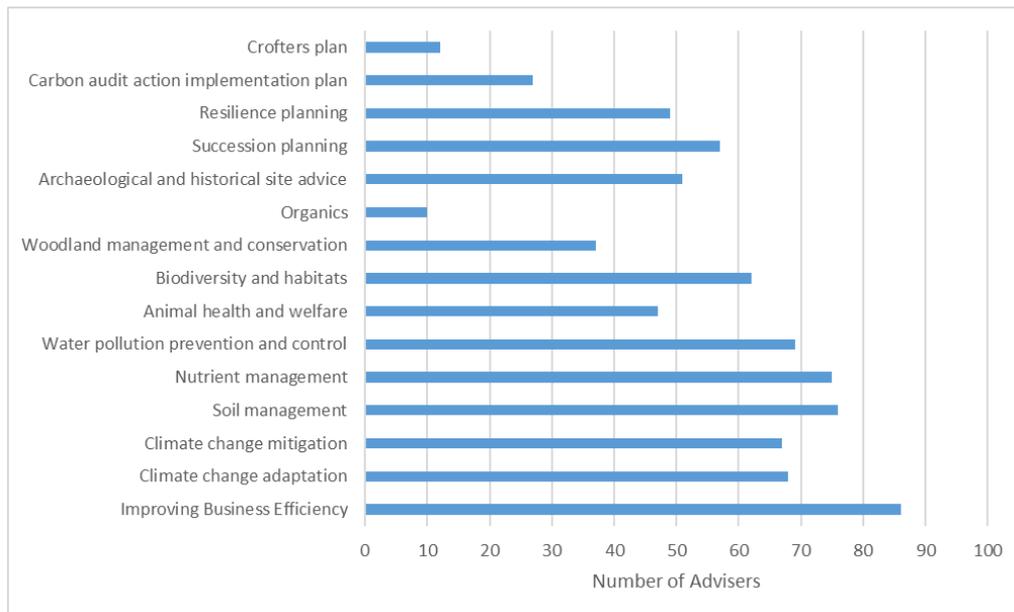
If any adviser's reports are consistently below standard (Score <5) and in agreement with the Scottish Government, then the adviser will not receive FBAASS accreditation the following year.

**Figure 2: Report submission process**



## 6.2 Verification of Specialist Advisers

The delivery of specialist advice is open to any adviser, subject to verification by Ricardo that the adviser is sufficiently qualified and experienced. The requirement is for evidence of relevant training and a minimum of four years' experience delivering on the specific topic. The details of all advisers approved by the service are maintained in a database and [available](#) to aid farmers/land managers on the FAS Specialist Advice Webpage to help businesses to identify a suitable adviser. A business may also choose an adviser out with that list and Ricardo will work with that adviser to establish that these checks are completed. There are currently 139 specialist advisers who have been approved by Ricardo.



**Figure 3 Chart to show specialisms of advisers**

## 6.3 Adviser Training

FAS provides training to ensure advisers have the skills to meet the needs of current and future agricultural government policy/targets. Ricardo has a reputation for delivering quality, relevant training to advisers and we will continue to work with advisers and stakeholders to identify training to meet the needs of Scottish agriculture.

In recent years training has been delivered remotely via Teams/Zoom meetings, this has enabled a more flexible and efficient means of delivering the training. However, this forum does not allow for further engagement and for advisers from different organisations or specialist areas to network. Since farmers often rely on the recommendations to identify the best specialist to support their business, this is an opportunity missed.

In 2023, we propose to deliver three strands of adviser training

- One day climate ready adviser training day (Repeated in 3 locations)
- Piloting of Mental Health First Aid Awareness Course for FBAASS Advisers
- Ad-hoc additional training via Zoom as needs/demands arise.

## 6.4 Climate ready adviser training day

Great changes are required in the land management sector if we are going to meet Scottish Government's commitment to net zero by 2045, tackle the loss of biodiversity, maintain per capita food production, and have an economically viable rural economy

It is clear that farmers need significant support from advisers to enable and encourage them to transition to climate and nature friendly farming, respond to investment opportunities and to deliver sustainable economic and environmental outcomes.

These demands place a huge ask on advisers and often requires them to build new knowledge and skills. Whilst it is acknowledged that there is no quick fix, developing the depth of knowledge required takes time and experience, FAS can play a key part in beginning this journey. FAS has existing contacts with over 200 advisers in Scotland. We propose to invite advisers to attend one of 3 one day climate change information and training events; potentially in Aberdeen; Stirling; and Moffatt. Whilst Ricardo have considerable understanding of the mitigation and adaptation requirements of farmers we will draw on the support and involvement of others in the sector with an interest in supporting this initiative, we

will initially reach out to the Climate Emergency Response Group (CERG), Scottish Government's Agriculture and Climate Change Branch, Soil Association, Woodland Trust, NatureScot and the Farming for 1.5° Panel to define the agenda, identify speakers and others who would have an interest in being involved.

## 6.5 Mental Health First Aid Awareness Course for Advisers

Farm advisers often have great knowledge of the stresses a business face but may not have received any training of guidance about how best to support. With the current financial strains on agricultural businesses, we anticipate that there will be a greater need for advisers to have the knowledge and confidence to intervene.

FAS will work closely with RSABI to provide guidance to advisers on how they can help to support farmers where they are concerned that the farmer is suffering from stress or may need more emotional support. A basic introduction will be provided to all advisers via a Zoom Meeting, advisers will then be invited to take this a step further to attend a 5 hour face-to-face Mental Health First Aid Awareness Course delivered in partnership by RSABI and training provider [IED](#). The course will be delivered in 3 locations (Thainstone, Edinburgh and Stirling). In this first pilot, FAS will fund the course costs of 60 advisers (20 per session). In the first instance places will be offered to the FBAASS advisers as we perceive at the current time that the advisers working on business finance, efficiency and resilience are likely to encounter clients at key stress points. Ricardo will monitor uptake and offer any remaining places to advisers who deliver specialist advice on behalf of the programme.

## 6.6 Ad-hoc on-line training delivery

Ricardo will continue to seek feedback on where training is required, this will include looking to:

- a) Feedback from advisers on where they feel they need further information
- b) Feedback from the peer review of reports
- c) Feedback from Scottish Government, the Steering Group and stakeholders on areas in which they require advisers to be better informed.

## 7 Marketing Plan

### 7.1 Targets:

Ricardo has the following targets:

**Table 2 FAS one-to-one delivery targets**

Activity	Annual target
ILMPs	300
Specialist advice	100
Mentoring new entrants	60
Carbon audits	250

### 7.2 Aims:

The aims are to:

- Raise awareness and educate Scottish farmers about the FAS grants programme
- Stimulate interest from target segments of Scottish farmers
- Generate sufficient grant applications to reach or exceed the programme targets (see above)

Whilst all elements of the service need promoting, it is anticipated that we will continue to see a strong demand for Carbon Audits and Specialist Advice, therefore the ILMPs and mentoring are a particular focus as interest from farmers is not currently at the desired levels.

### 7.3 Marketing activities

The marketing plan incorporates the following marketing activities:

**Table 3 Marketing Channels**

Marketing approaches	Number of activities supported
• <b>Video case studies</b>	5
• <b>Direct mail</b>	4
• <b>PR</b>	12
• <b>Stakeholder engagement</b>	4
• <b>Social media (organic and paid for)</b>	
○ <b>Twitter</b>	24
○ <b>Facebook</b>	24
○ <b>Google Ads</b>	3
• <b>Website review</b>	1

### 7.4 Video case studies

The case studies raise awareness, stimulate interest and prompt action. The marketing communications must demonstrate the benefits of the different services. To do this it is recommended that four to five longer form video case studies (3 to 4 mins long) are developed to be hosted on the

FAS website and promoted via other channels such as social media. We propose an initial four case studies for development on the following topics:

- Integrated Land Management Plans (ILMP)
- Mentoring
- Specialist advice - Climate change, nature in farming and biodiversity
- How the support can help tackle rising energy and fertiliser costs

A further video case study on individual resilience, mental well-being and work/life balance is also planned.

The case studies must:

- Encompass different types of stakeholders: farmers, land managers, advisors, policymakers
- Explain how the grants can benefit the target audience
- Detail how their farm/business has benefitted

## 7.5 Direct mail/E-shots

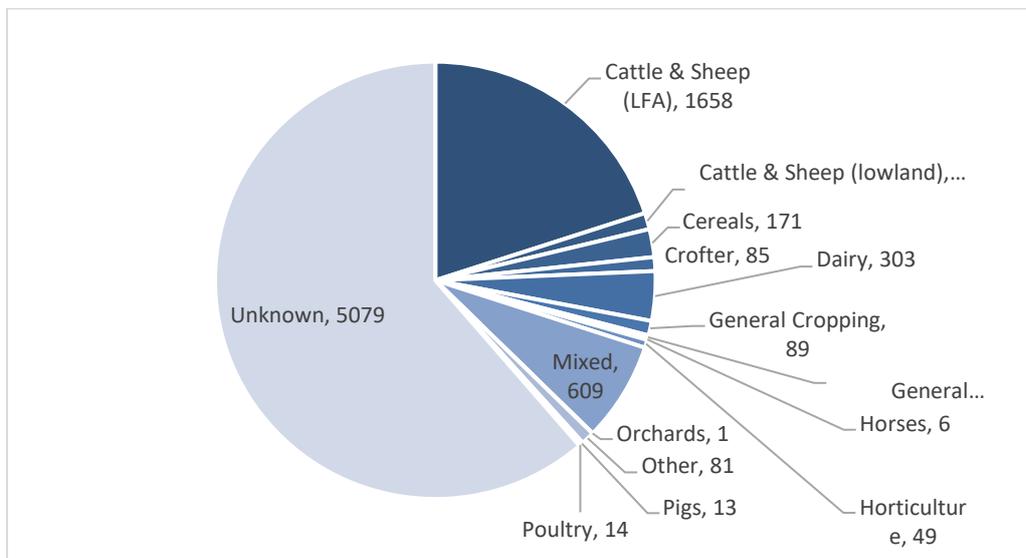
Direct mail can be used to promote the services available through both the One-to-One and One-To-Many services, publicise events and to encourage recipients to respond.

In early 2023, a direct mail was sent to all registered agricultural businesses in Scotland to promote awareness of the FAS services. This will be followed up with direct e-mails sent direct to the target audience utilising the contact information we have in our electronic contact database (previous users of the FAS one-to-one). In establishing the volume and targeting of this Ricardo will take stock of the impact of the previous activity to ascertain if follow up mailings are appropriate. It is important that we promote uptake but not beyond the budgetary capacity of the programme to support advice or this will lead to disappointment.

### 7.5.1 Targeting farmers by sector

Up to four follow up mailings/email campaigns are proposed, these will be delivered utilising the database of previous users of the service to enable targeting. The FAS one-to-one database currently holds details of 12,031 contacts, representing 8,579 businesses

**Figure 4. Chart to show the split of business information held by FAS**



Messaging will be tailored to target farming sectors, focusing on:

- Cattle and Sheep
- Cereals and Cropping
- New entrants
- Crofts

### 7.5.2 Focusing on new entrants

Ricardo will work with the one-to-many service to establish a contacts list for new-entrants to farming, SAC will have this through the new entrants to farming programme. We will work with SAC to agree if one-to-one promotional material is best placed within established new-entrants' communications. Communications will focus on promoting the support available via the mentoring, ILMP, Specialist Advice and Carbon Audits. Particularly drawing on case studies of the support for business planning, climate change, diversification and improved business performance.

### 7.5.3 Tailored information for crofters

Ricardo will work with, Siobhan Macdonald (one-to-many service) the Crofting Federation and the Crofting Commission to provide an additional focus on establishing communications with crofters. The current crofter' flier will be updated and circulated; we will also establish opportunities to include case studies of crofters utilising the service (there are many) in sector publications. Communications will focus on:

- Support to help form common grazings committees and support them on enhancing biodiversity, emissions reduction, food security and supporting the local economy.
- Supporting succession.
- Advice and support on peatland restoration, biodiversity, woodland creation on crofts/common grazings.

## 7.6 Public Relations (PR)

PR can be a very effective way of reaching audiences which are difficult to access via other channels. A programme of press releases and technical articles developed for the target audience and specific media/publications will be developed to take the FAS messages to as wide a farming audience as possible. Three main channels are proposed:

- Farming and agricultural trade & technical media (print & online)
- Farming and business correspondents on Scottish regional consumer media (print, broadcast & online)
- Stakeholder news channels e.g., newsletters and other updates from professional and other farming bodies and organisations e.g., NFU, CLA etc.
- A 2-weekly 250–300-word article in Scottish Farmer.

### PR targeting trade & technical and consumer (farming/business) media

A search using Ricardo's Vuelio media database identified the following list of relevant Scottish media titles and farming correspondents:

**Table 4 Potential Media and Publications**

Title/programme	Potential Audience	Trade/consumer press
Farming Scotland Magazine	5,000	Trade
Landward	250,000	Consumer/Trade
The Ayrshire Journal		Trade
Scottish Grocer	6,895	Trade

<b>The Scottish Farmer</b>	15528	Trade
LandBusiness Scotland	3,000	Trade
foodies	16,983	Consumer
Farming Monthly National	20,000	Trade
Farm North East	5000	Trade
Wishaw Press	1,836	Consumer
Scottish Farming Leader	8,500	Trade
<b>The Press &amp; Journal (North East)</b>	28,482	Consumer
Cumberland News	14,502	Consumer
Radio Borders	56000	Consumer
The Herald	3415	Consumer
Sunday Herald	25006	Consumer
The Scotsman	9,141	Consumer

In addition, there are a number of UK publications which will be researched to determine penetration into Scotland, for example: **Farmers Weekly** (circulation approximately 101,000); Farmers Guardian (circulation 46,002), Dairy Farmer, **NFU British Farmer and Grower Magazine (circulation 49,200)**.

A provisional programme of targeted press releases and articles for trade & technical and farming correspondents in Scottish national and regional consumer media is outlined below. The PR programme would also research suitable editorial features to develop a number of more targeted articles which will provide opportunities for in-depth coverage of the support provided by FAS in Scotland as well as the benefits and case studies. These articles will be relatively short (about 2 pages in length) in order for them to be picked up and placed by the press.

**Table 5 Proposed schedule of communications**

Month	Subject
April	Water Scarcity, planning water resources
May	Ammonia, why you should care and what you can do about it (including discussion of manure management and spreading techniques)
June	Grazing management- optimise your grassland- case study
July	Nutrient use efficiency, controlled release fertilisers, benefit of a nutrient management plan
August	Legumes and intercropping, benefits for the environment and your budget
September	Future uncertain, utilise the resilience support to secure the future of your business, incorporate elements of mental health support
October	Livestock health management- id and traceability – getting it right- support through FAS
November	Benefits of trees on farm (biodiversity, shelter, value, water management, carbon sequestration)- the support through FAS, Forestry Grants and Government Policy
December	Reducing agricultural industry's emissions to meet the nation's net zero targets – support available through FAS
January	How nature based (low carbon, low input) agro-ecological systems can be adopted by current farming systems to improve climate resilience, biodiversity outcomes, sustainable production and protect profits.
February	Livestock nutrition, optimising forage and feed rationing to improve carbon footprint and business efficiency
March	Water pollution mitigation (case study) and support available through FAS

## 7.7 Stakeholder engagement

The marketing team will research to identify if there are further stakeholder networks and communication channels which could be used to disseminate information about the services provided by FAS:

- The 147 FBAASS advisors/associates and 139 specialist advisers spread throughout Scotland are one route to the farming community which will be utilised. We provide a quarterly stakeholder pack with information to help them promote FAS in the course of their everyday work. Ongoing engagement with the FAS advisors is essential to ensure we are delivering the right kind of information using the right channels for them.
- Other networks, such as the NFU, hold regional/local meetings at which information could be circulated to members, presentations delivered, or information distributed.

## 7.8 Social media

### 7.8.1 Twitter and Facebook

Twitter is already used to communicate key FAS messages and events. It will be used to support the PR programme as well as distributing other topical information regarding FAS services. The programme will seek to grow its audience and to optimise the use of this medium as this provides a very cost-efficient means of communicating. Twitter posts are drafted to coincide with the 2-weekly Scottish Farmer article to ensure consistency of message and maximise content.

- Facebook is another channel used by the programme. Both Twitter and Facebook have huge potential to grow their subscriber/audience base and provide a targeted channel to reach the intended audiences. A paid-for, targeted social media campaign of sponsored tweets and Facebook ads is proposed to help grow the subscriber and audience base. Audiences will be segmented by type and suitable social media content developed.

As the current social media accounts are managed by SAC, this can prove a bit of a barrier in ensuring that one-to-one content is promoted in the most effective manner. Therefore, we will explore the possibility with SAC of having access to both the Twitter and Facebook accounts to be able to post one-to-one-related content in a timely and engaging manner.

## 7.9 Google Ads

A Google ads search campaign (sponsored link appears when stakeholders search for service FAS offers) and a display campaign (retargeting people who've visited the FAS website before with banner ads and images) is proposed to help drive traffic to the website and increase one-to-one registrations.

## 7.10 Website

The content management for the One-to-One section of the website is controlled by SAC. We will explore the possibility with SAC of taking on the content management of the One-to-One section, to allow us to ensure that the content is relevant to the One-to-One services that we want to promote.

We will undertake a review the website to check the following:

- Terminology used – does it resonate with the target audience, for example: should it be 'new entrants' or 'new business start-ups'. The latter makes it much clearer who is the intended target audience.
- Are the benefits and USPs clearly communicated? A key issue to address is 'What's in it for me/my business?'
- Is the latest, most up-to-date content visible and accessible on the website?

## 7.11 E-newsletter

The FAS newsletter is managed by the One-to-many Service, with Ricardo providing content. It is important that this newsletter is regularly distributed and that we continue to grow the readership.

Ricardo will seek to establish with SAC details of the current readership and the impact and readership of articles so we can ensure the best impact of this important communication's channel.

## 7.12 Monitoring and evaluation:

The marketing activities will be monitored using the following metrics on a monthly basis:

**Table 6 Monitoring marketing impact**

Marketing activity	Inputs	Outputs	Impacts
Case studies	Number of case studies of successful grant support	Video and written case studies for use with various marketing collateral e.g. on website, direct mail etc.	Increases awareness and interest. Stimulates action.
Direct mail	Number of DMs sent	Response: <ul style="list-style-type: none"> <li>Website visits</li> <li>Information downloads</li> <li>Telephone/e-mail enquiries etc.</li> </ul>	Number of grant applications
PR	Number of press releases issued	Amount of coverage Response: <ul style="list-style-type: none"> <li>Website visits</li> <li>Information downloads</li> <li>Telephone/e-mail enquiries etc.</li> </ul>	Number of grant applications
Stakeholder engagement	Number and type of stakeholders engaged	Feedback from stakeholders Response: <ul style="list-style-type: none"> <li>Stakeholder pack downloads</li> <li>Website visits</li> <li>Telephone/e-mail enquiries etc.</li> </ul>	Number of grant applications
Social media (organic and paid for)	Number of Tweets/	Response: <ul style="list-style-type: none"> <li>Shares/retweets/interactions</li> <li>Website visits</li> <li>Information downloads</li> <li>Telephone/e-mail enquiries etc.</li> </ul>	Number of grant applications
Advertising - print and online	No of adverts generated	Response: <ul style="list-style-type: none"> <li>Website visits</li> <li>Information downloads</li> <li>Telephone/email enquiries</li> </ul>	Number of grant applications
Website	Review of webpages & content	Response: <ul style="list-style-type: none"> <li>Website visits/pages visited</li> <li>Information downloads</li> <li>Telephone/e-mail enquiries etc.</li> </ul>	Number of grant applications

## 8 Providing Added Value

### 8.1 Stakeholder Engagement

Ricardo will continue to place significant focus on stakeholder engagement and communications activities which have been proved to be instrumental in ensuring the FAS delivery is well established and integrated in wider agricultural support in Scotland. This includes supporting stakeholder meetings, providing speakers to stakeholder events and sharing content via the stakeholder pack.

### 8.2 Evolving the service

The one-to-one service provides the scope of advice required by farmers and land managers to support them to meet current challenges in the industry, key to these being business resilience and adapting to reduce climate impacts and improve biodiversity. A key focus for delivery this year will be on building the adviser capacity to deliver this support and on promoting uptake and action from farmers.

### 8.3 Providing flexibility

Ricardo will continue to seek feedback from service users, advisers delivering the service, stakeholders and Scottish government to identify how the service could better serve the needs of the sector. Ricardo will be creative and proactive in identifying how the service could flex and evolve to meet these needs. This might be through developing new one-to-one services, removing barriers to uptake or providing more training to advisers. We are committed to ensuring the service provides the best value to our clients.

## 9 Managing service data

Ricardo tracks all interaction with the service via a Customer Relationship Management (CRM) database. This enables Ricardo to provide rapid reporting to Scottish Government on all aspects of service delivery. Ricardo will continue to maintain this database to:

- Track customer information to understand who has engaged, how they have accessed the service and what support they have received.
- Manage the progression of each scheme. The CRM verifies all requirements are complete before payment e.g. claim form received, and value checked.

Our CRM is secure, and password protected, to meet data protection requirements.

### 9.1 Managing flow-through funds

Ricardo will administer payments on behalf of Scottish Government. We are experienced having managed the disbursement of public funds for many years. Our management of funds has passed all scrutiny and audits by the National Audit Office. Our accounting system Agresso is a top-tier, global accounting system well recognised within industry and is compliant with the requirements of the National Audit Office, HMRC and the London Stock Exchange.

The process provides:

- A dedicated programme account
- Robust triple-checks for accurate payments and transparency
- A simplified approach for the Scottish Government only requiring one monthly payment

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.

Ricardo is flexible and can make ad hoc payments to reduce the time an advisor (predominantly a small business) has to wait to be paid.

## 10 Service Offering

Regardless of farm size or business stage, through FAS, new and experienced farmers can access a range of expert consultancy and specialist advice to help them achieve their business aspirations.

One-to-one support services and funding available:

- Integrated Land Management Plans (ILMP) - Up to £1,200 per plan
- Specialist advice - Up to £1,000 funding
- Carbon audits - Up to £500 per audit, available per annum
- Mentoring for new entrants to farming - Up to 4 days one-to-one with a personal mentor

Each business is eligible to receive 1 ILMP, 2 Specialist Advice Reports over the course of the contract; and a Carbon Audit every 12 months.

**Figure 7 Diagram to show the potential offering to a typical business**



ILMP	£1,200
Specialist advice x 1	£1,000
Specialist Advice x 2	£1,000
Carbon audit	<u>£500</u>
FAS Funding =	£3,600

## 11 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

**Figure 8: Graphic to show the components of an ILMP**



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.

## 11.1 Funding ILMPs for New Entrants

This new contract will provide up to £1,200 of government support to cover the full costs of an ILMP for new entrants, the business will not need to pay the additional 20% of costs but will need to pay the VAT element.

This new initiative is to encourage New Entrant's to farming to take advantage of an ILMP. The ILMP enables the business to bring in a professional consultant at the start to help advise through the set up stages of the business.

Why is an ILMP important for new entrants?

- ✓ Provides support tailored to the business
- ✓ Identifies areas for improvement and build on strengths
- ✓ Provides professional advice to support decision making
- ✓ Signposts the business to further sources of information and support

## 12 Specialist Advice

### 12.1 Topics and new focus

Specialist advice supports the business to take a deeper look at specific issues of concern or interest.

In addition to an ILMP, a business can benefit from two specialist advice plans, covering:

- climate change adaptation and mitigation
- soil and nutrient management
- biodiversity, habitat and landscape management
- water pollution, prevention and control
- archaeological and historic site advice
- resilience planning
- Carbon Audit action implementation
- farm business efficiency
- organics
- woodland management and conservation
- animal welfare
- succession planning
- The Crofters Plan

Whilst the above categories of specialist advice encompass the actions required of farmers to adapt management practices to reduce the climate and pollution impacts of land management practices, we propose to introduce sub-categories to the climate change adaptation and mitigation offering. We propose the introduction of the following:

- Nutrient budgeting and use of controlled release fertilisers
- Slurry injection
- Legumes/ intercropping
- Manure management
- Livestock health
- Feed management
- Genetic improvement of ruminants
- Peatland restoration
- Ammonia emissions

Through introducing these sub-categories, we hope to stimulate more focused thinking of the actions that a business might adopt. The benefits of adopting these practices will be a key focus to communications and promotions in 2023. The impact of this single action approach will be monitored and if successful will be adopted within the other category headings.

### 12.2 Delivery of specialist advice

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.

## 12.3 Specialist Advice Grant Rates

There is up to £1,000 government funding towards specialist advice, the business must pay the VAT element (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.)

Since April 2022 there is no longer a requirement for an ILMP prior to undertaking Specialist Advice.

## 12.4 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. This support is 100% funded at £1,200, the applicant is required to cover the VAT.

### 12.4.1 Eligibility:

As well as requiring the farmer or crofter to have a BRN number, an assessment from RSABI is required to confirm hardship. RSABI, conduct a visit and complete an internal application form to refer the farmers to FAS. The completed form is submitted to [one2one@ricardo.com](mailto:one2one@ricardo.com) however RSABI will also alert the Ricardo team, who will keep RSABI informed on progress and support in finding an adviser if required.

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).

The applicant is still be eligible for the remaining grant assistance that is available as per the current scheme guidelines.

# 13 Carbon Audits

Carbon Audits are undertaken using the Agricultural Resource Efficiency Calculator (AgRE Calc). FAS carbon audits provide businesses with a comprehensive report detailing the carbon footprint for the business, and a comparison of how the business is performing against other similar businesses. Importantly the report details where emissions are arising and through review of this and discussion of current management practice the adviser develops a bespoke action plan to help the business to reduce emissions in the future.

FAS have a target to deliver 250 carbon audits 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.

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/>

If businesses need further support to help implement their carbon audit action plan, there is further support now available through the FAS specialist advice category.

## 14 Mentoring for new entrants

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/entry to the industry, 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.

### 14.1 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 is these personal contacts that are most potent in encouraging an experienced farmer to get involved and share their 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 gathers information to enable us to create a profile and to match their skills with mentees.

Mentors come from a wide variety of backgrounds and experience, but key 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.).

## 14.2 Process for recruitment of mentees

Ricardo will continue to work closely with the New Entrants to Farming Programme and Scottish Government's FONE group to ensure all new entrants who engage with this group or receive support via the Government are informed of the mentoring service.

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.

## 15 Quality Assurance

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:

### 15.1 Key Performance Indicators (KPIs)

- 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).

### 15.2 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 Dave Freeman will review whether there is a need to provide further training or to modify procedures. Each complaint will be taken very seriously, we receive few complaints, but when they do occur we ensure they are resolved swiftly and learning are reviewed to support service improvement. 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 Jack Dalziel (Scottish Government) and will discuss Ricardo's proposed resolution. In the case of a severe misdemeanour this may involve removing an adviser's accreditation. Such a step would never be taken without the agreement of Scottish Government.

## 16 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 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.

## 17 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 will formally report on the feedback from each of the four grant schemes on an annual basis. This will include providing a full analytical report of the feedback received but also analytics to identify who is using the service and how they are accessing the advice to help inform future delivery. Whilst formal reporting is conducted on an annual basis, Ricardo will continue to extract data for Scottish Government on an ad hoc basis to respond to queries or help inform policy decisions.