

# Portmoak Community Woodland Group Perth & Kinross-shire, Scotland

*This 43 ha woodland was the first to be purchased from the Forestry Commission by a community and is managed by the Woodland Trust*

# PORTMOAK COMMUNITY WOODLAND GROUP

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This case study is one of a set written as part of a Forest Research project. Some case studies are written by the community group, others by researchers who visited and interviewed group members, but they have all been validated and endorsed by the community groups.

Forest Research developed a standard method for describing the case studies, outlined in Lawrence and Ambrose-Oji, 2013 "A framework for sharing experiences of community woodland groups" Forestry Commission Research Note 15 (available from [www.forestry.gov.uk/publications](http://www.forestry.gov.uk/publications)).

The case study comprises three parts:

1. The **Group Profile** provides essential information about the form and function of the community woodland group. Profiles were prepared following the methodology
2. The **Change Narrative** which documents key moments in the evolution of the community woodland group with a particular focus on the evolution of engagement and empowerment
3. The **Engagement and Impacts Timeline** documents milestones in the development of the community woodland group, its woodland and any assumed or evidenced impacts.

The case studies collectively provide a resource which documents the diversity and evolution of community woodland groups across Scotland, Wales and England. The method ensures that the case studies are consistent and can be compared with each other. We welcome further case studies to add to this growing resource.

For further information, and for the detailed case study method, please contact:

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## 1. Group profile

**Woodland: Portmoak Moss, Kilmagad Wood**  
**Map ref: NO 183918**  
**Webpage: <http://www.portmoakcw.org.uk>**  
**Date of profile: February 2014**  
**Resources: Interview and site visit, website (Minutes, Events), Kilmagad Wood Management Plan 2006-2011, Portmoak Moss Management Plan 2011-2016 (draft), archived materials from period around forest acquisition.**

<b>1. Institutional context (in February 2014)</b>	
<b>1.1 Ownership of the woodland(s)</b>	<p>Portmoak Moss, Kilmagad Wood and an adjoining field to Kilmagad Wood lower on the hillside are all owned by Woodland Trust (WT) Scotland. They manage the woodland in collaboration with Portmoak Community Woodland Group (PCWG). The group has contributed to fundraising for acquisition and woodland maintenance.</p> <p><b>Classification of tenure: Informal agreement (private)</b></p> <p>Note: The group does not have a formal use agreement with Woodland Trust Scotland, who own the woodlands but the model of partnership working with Woodland Trust is recognised as best practice across the community woodlands network. There are monthly meetings attended by WT which we use to shape the way forward through partnership working.</p>
<b>1.2 Access and use rights to the woodland(s)</b>	<p>Responsible public access (by foot, bicycle, horse or canoe) is guaranteed by the Land Reform Act. Motorised vehicles are not permitted within the woodland. The woodland path is used routinely by cyclists.</p> <p>The Woodland Trust maintains all rights to woodland products.</p>

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<b>1.3 Regulations/ responsibilities affecting the woodland(s)</b>	The minimum legal requirements for H&S, historic monuments and pest and diseases management as outlined in the UK Forestry Standard.
<b>2. Internal organisation of the group/enterprise</b>	
<b>2.1 Group members, representation and decision making</b>	<p>PCWG represents the interests of the Portmoak parish on the east of Kinross-shire. All group members are either from Scotlandwell or Kinnesswood, which are the two villages in the vicinity of the woodlands.</p> <p>Anyone, regardless of residential location, is welcome to join the activities and monthly meetings organized by the group. The group does not offer membership opportunities; everyone is eligible to get involved either in the Steering Group or engaging with woodland-related activities. Events serve to engage with a broad range of age groups and interests within the community.</p> <p>Decisions are normally made at monthly meetings that are also attended by a woodland officer from the Woodland Trust (WT). These meetings are organised by a group of nine regular members together comprising the steering group, including a Chair, Treasurer and Secretary. They organize woodland-based activities and give voice to the views of the community in communications with WT. The group also organizes an AGM.</p>
<b>2.2 Communication and learning processes</b>	<p>The group engages in regular communication with the community. It does so via the Kinross newsletter, the PCWG website, a mailing list, and events organised for the community such as the annual Burns supper. Events are advertised more widely using flyers and by approaching schools.</p> <p>Despite regular outreach, the active membership of PCWG has remained very stable over the years. The group evaluates its success through meeting management, planning targets and encouraging people to think differently about the Moss as a habitat.</p>
<b>2.3 Structure and legal status</b>	<p>PCWG has a constitution that provides the basis for their activities.</p> <p><b>Classification of legal form: Unincorporated Association</b></p>

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<p><b>2.4 Regulations/ responsibilities affecting the group/ enterprise</b></p>	<p>National Woodland Trust Policy specifies that the group is not permitted to undertake large scale woodland management activities on site.</p>
<p><b>2.5 Forest management objectives and planning procedures</b></p>	<p>The management plans of Portmoak Moss and Kilmagad Wood are prepared by the WT. The objectives of the Portmoak Moss management plan can be roughly summarised as:</p> <ul style="list-style-type: none"> <li>• To improve the diversity of tree age and species by allowing for natural regeneration supplemented by planting.</li> <li>• To restore the raised bog into its natural state by increasing water levels.</li> <li>• To provide a high quality, well-connected, path network and undertake remedial work on unsafe trees.</li> <li>• To liaise with the local community around woodland management activities.</li> </ul> <p>The objectives of the Kilmagad Wood management plan can be roughly summarised as:</p> <ul style="list-style-type: none"> <li>• To gradually plant the open ground with native tree species and protect these with a deer fence.</li> <li>• To maintain and improve integration of the current path network.</li> <li>• To liaise with the local community around woodland management activities.</li> </ul> <p><b>Overall aim of plan: Public access and recreation</b></p>
<p><b>2.6 Implementing the woodland management plan</b></p>	<p>The WT prepares and implements the management plans for Portmoak Moss and Kilmagad Wood. Steering group members from PCWG contribute to management decisions by the WT and sometimes engage in practical work (e.g. clearing Rhododendrons, path clearance and orchard tree planting). Members of PCWG are, however, not allowed by the WT to engage in large-scale woodland management activities out of safety and insurance concerns.</p> <p>PCWG raises funds to organise events and carry out any woodland (management) activities that are not covered by the WT management plan (e.g., planting of orchard trees, events). In the past, fundraising has also been</p>

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	undertaken to contribute towards the three woodland purchases.
<b>2.7 Business/ operating model and sustainability</b>	<p>The group runs themselves as an informal society, who meets and discusses woodland-related matters in the local pub. The group raises funds through organizing community events and selling Christmas trees. Any income is re-invested into community events in and around the forest and into small-scale woodland projects (e.g., installation of benches). In the past, PCWG has also engaged in fundraising (£10,000), which was match-funded by Perth and Kinross Council, in order to support the WT in purchasing Portmoak Moss; the group has fundraised for a total of three community woodlands within the Portmoak parish.</p> <p>In a typical year, 100 percent of income is generated through fundraising. This amounts to £1,500-£2,000 annually. PCWG does not have an intention to develop forest-related enterprise.</p>
<b>2.8 Benefit distribution rules</b>	Any income generated from trading woodland products is retained by the WT. PCWG raises some of its funds through woodland-based events such as moths and butterflies identification, the Lantern Festival and Christmas tree events. Although entrance is for free, many attendants donate on these occasions. This income is re-invested in community events.
<b>3. External linkages</b>	
<b>3.1 Partnerships and agreements</b>	<p>PCWG has a formal partnership with the WT. PCWG contributed some of the funds used towards purchasing each of the three woodlands and is consulted on any woodland management decisions in return.</p> <p>There was an agreement between PCWG and ExxonMobil around sponsorship. In the past ExxonMobil funded the community woodland volunteer hours of an employee under their Volunteer Involvement Programme but this ceased when the employee retired.</p> <p>PCWG has recently set up a partnership with the Living Lomond's Landscape Partnership (LLLP), with the intention of accessing funding for the preparation of a long-term management plan of Portmoak Moss.</p> <p>There is an agreement with the University of Edinburgh regarding the installation of nest boxes in Kalmagad Wood, which are monitored for blue tits by students. PCWG has also participated in research by Scottish</p>

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	<p>Environment LINK around communications between local groups and national government agencies. PCWG also has a partnership with RSPB, who own Vane Farm, a nearby nature reserve. RSPB has undertaken bird surveys and backed the bid for community acquisition of Portmoak Moss in 1995.</p>
<p><b>3.2 Associations</b></p>	<p>PCWG is a member of the Community Woodland Association (CWA) and has links with Reforesting Scotland. CWA membership is considered incredibly valuable for establishing links with groups across Scotland, sharing training events and knowledge exchange.</p>
<p><b>4. Resources</b></p>	
<p><b>4.1 Forest/ woodland</b></p>	<p><i>Portmoak Moss:</i></p> <ul style="list-style-type: none"> <li>• Portmoak Moss is a 43 ha woodland site.</li> <li>• The Moss is situated south-west of the village Scotlandwell, south of the village Kinnesswood and east of Loch Leven.</li> <li>• The woodland can be accessed from the B920 via an access road to the east, to which right of way has been granted. There is a small visitor parking area available at the entrance on land owned by a local farmer. Pedestrian access to the forest can also be gained from the north. The woodland has a triangular path network, of which one stretch is part of the local Michael Bruce Way circular. The path network is well-drained, level and lacks steep gradients, allowing the woodland to be accessed by disabled people.</li> <li>• The soil mixture is comprised of deep peat at the top and coarse lake muds, clay and sandstone at deeper levels.</li> <li>• The site encompasses a combination of woodland and raised bog. The raised bog that is currently cleared of trees is approximately 12 ha in size. Portmoak Moss was planted as productive forest between 1960 and 1963 with as predominant species Sitka spruce and Scots pine. Other conifer species present are: lodgepole pine, hybrid larch, grand fir and noble fir. The broadleaved species that can be encountered are</li> </ul>

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downy birch, oak, rowan, willow, sycamore and ash. Most of these are self-sown on open spaces, with some mature trees predating the forest plantation. Ground flora is mainly encountered in the areas of broadleaved woodland.

- **Classification of woodland type: Mixed mainly conifer**
- The raised bog was cleared of conifers between 2000 and 2004. Damming of drainage channels was completed in 2005.
- Due to a lack of thinning operations, poor drainage and peat soils windthrow is commonplace. This has resulted in a high degree of standing and lying deadwood.
- Raised bogs are a UK Biodiversity Action Plan priority habitat as well as an LBAP habitat. Portmoak Moss is home to some notable bird species: Greater spotted woodpecker, bullfinch, redpoll, tawny owl, barn owl, long-eared owl, crossbill, jay and goldcrest. Pipistrelle bats have also been recorded on site as well as roe deer, red squirrel and rabbit. The annual number of woodland visits is estimated to be 11,000.

## *Kilmagad Wood*

- A 27 ha woodland area located on a steep hill side in the south-western part of the Lomond Hills.
- It is situated north-west of Scotlandwell, and south-east of Kinnesswood.
- The south-western part of the woodland touches the A911, from which it can be accessed via a pedestrian walkway. Visitor parking is provided near the entrance on land owned by the Church. The internal path network is comprised of unsurfaced tracks which can turn muddy with rainfall. The local Michael Bruce Way runs through the forest and the wood is an entry point to walkers exploring the Lomond Hills.

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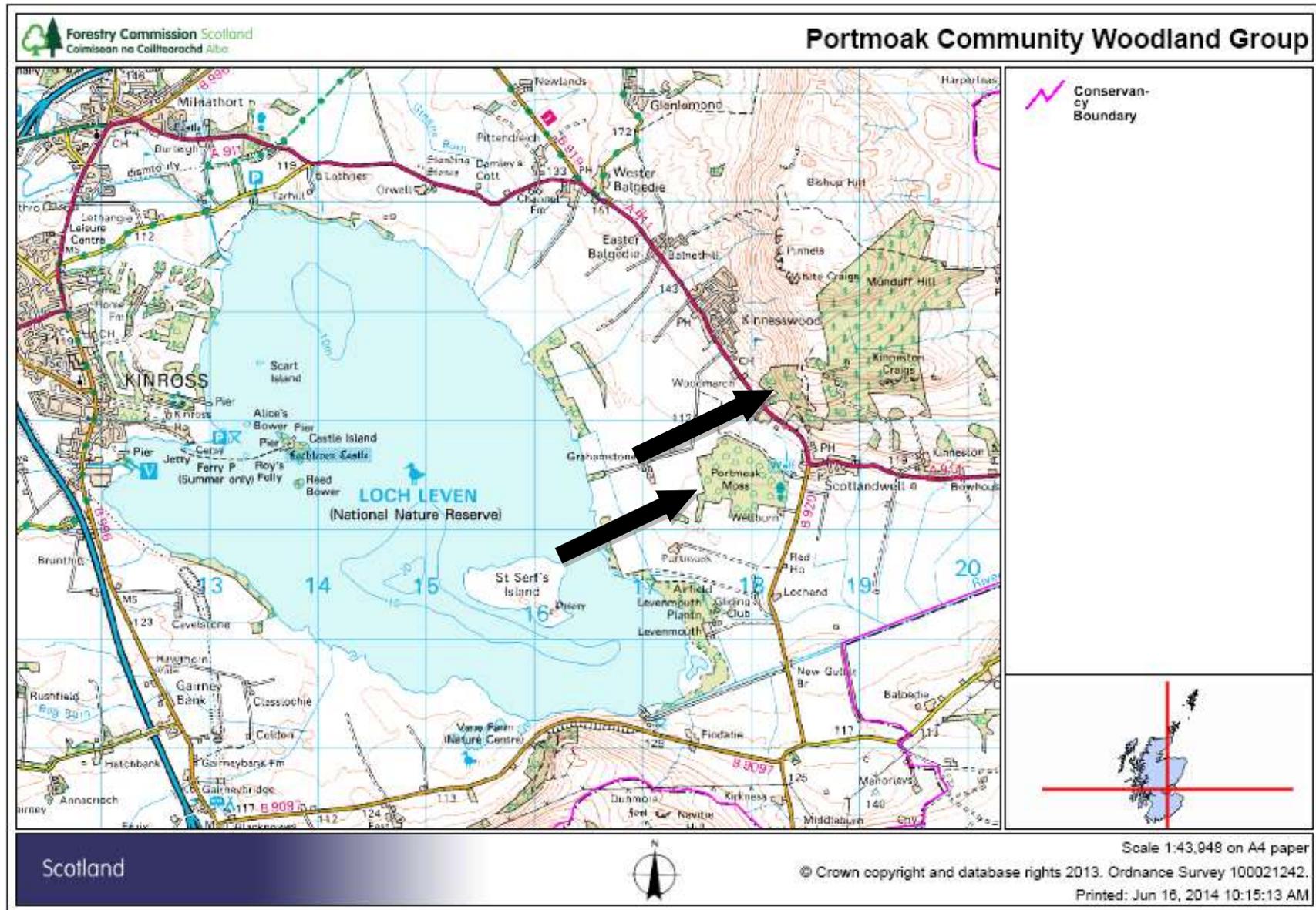
	<ul style="list-style-type: none"> <li>• The soil in the lower end of the woodland is mainly made up of sandstones. In the upper part of the forest, the soil encompasses calciferous sandstones and thin layers of limestone.</li> <li>• Forty percent of Kilmagad Wood can be classified as woodland and the remainder as open ground. The predominant species are: sycamore, beech and oak. Other frequent species are: ash, birch, rowan and hawthorn. Less common are hazel, Scots pine and larch.</li> <li>• Of the wooded area, nine percent was established in 1999 and the remainder is mature woodland.</li> <li>• <b>Classification of woodland type: Mixed mainly broadleaved</b></li> <li>• There has been farming of the shallow slopes in the past. Before acquisition by the WT, the land was used for sheep grazing.</li> <li>• Windthrow and grazing by rabbits and deer prevent open areas from regenerating and these spaces are rapidly invaded by gorse thicket and bracken.</li> <li>• Wildlife in the forest includes rabbits, roe deer and foxes. Notable bird species are kestrel, wren, tree creeper, skylark and green woodpecker. It is estimated that the woodland is visited 9,000 times annually.</li> </ul> <p>PCWG also manages a third area of land (locally known as: "The Field a'bin the Kirk"), which is situated between Kilmagad Wood and the A911. This was previously used for grazing. The group aims to turn part of this into an orchard and has started planting out apples, pears, cherries and plums. The remainder will be turned into native woodland.</p>
<p><b>4.2 Woodland and group funding sources</b></p>	<p>All three woodlands have been purchased by the WT and in each of these cases PCWG has contributed by undertaking local fundraising, which in the case of Portmoak Moss was match funded by Perth and Kinross Council. During acquisition of Portmoak Moss, funds were further being made available by Scottish Natural</p>

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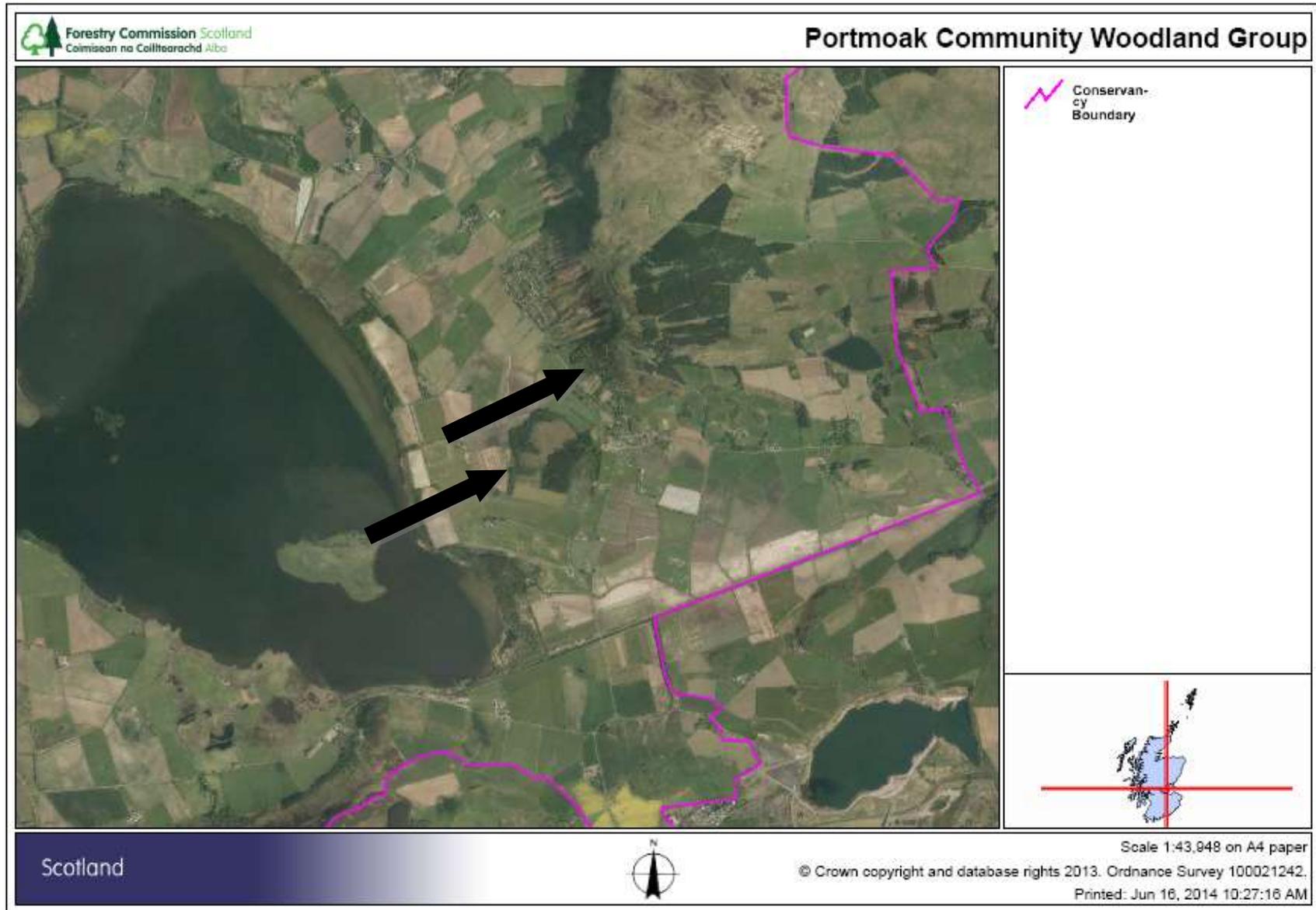
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	<p>Heritage (SNH), Heritage Lottery Fund and the Ramblers' Association. The purchase of Kilmagad Wood was made possible with support from the Scottish office Rural Challenge Fund, Perth and Kinross Council and the Gannochy Trust.</p> <p>Ongoing management of the forests is funded by the WT. On various occasions, ExxonMobil has provided support under their Volunteer Involvement Programme to cover running costs. SNH has funded some of the raised bog management and the development of a raised bog management plan.</p>
<b>4.3 Knowledge, skills, human and social capital</b>	<p>PCWG largely relies on woodland officers from the WT for gaining forestry skills and expertise. However, PCWG has access to expertise on raised bog management as a result of organising a "boginar" with experts on bog development and management.</p> <p>Group members have a variety of skills and expertise gained elsewhere that is of benefit to their activities. This includes forestry knowledge, management and business expertise, legal knowledge, practical skills, strong local networks, leadership and charring experience, presentation skills, and familiarity with risk assessments.</p>

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## 2. Change Narrative

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### 1. Group History. Moments of change, motivations and engagement

The Portmoak community was made aware of the plans of Forest Enterprise (FE) to dispose of Portmoak Moss in early 1994 by the Community Council. In response to this, two members of Portmoak Community Council approached FE with the request for more information. Portmoak Moss was valued as a community asset for recreational purposes and its aesthetics. The community feared that private ownership would result in restrictions to recreational access or clearfelling of the forest; things they had seen happening with other pockets of forest sold by Forestry Commission (FC). At a discussion on this topic at a public meeting in May 1994, the 40 attendees voted unanimously to oppose the sale. At this stage **informal enjoyment** of the woodland and bog became proactive concern amongst the community.

Following the public meeting, the community investigated several options to prevent the sale of the forest on the open market. The options considered included pressing for the community to hold a lease on the forest, or an agreement with FC whereby the community would undertake the management of the forest and forest purchase would be undertaken by the Woodland Trust (WT). The WT had recently purchased a woodland at nearby Moncreiffe Hill. Community acquisition was not considered as one of the options given the estimated purchase price of £75,000.

When the WT was approached by the community with the request to consider purchasing Portmoak Moss, they were initially hesitant. The main reason was a lack of immediate fit with the WT's acquisition criteria. However, strong enthusiasm and passion within the community led them to reconsider and eventually commit to purchasing the woodland. The WT did have one conditionality which was that the community raise 25 percent (£20,000) of the acquisition cost and initial management funds. This offer was accepted by Forest Enterprise before the wood was offered for public sale even though they were not legally bound to do so at this time. This was probably due to a changed mind set on community ownership of woodlands at that time as FC were considering a community ownership pilot scheme for Strathmashie forest near Laggan as well. The WT and the community were given a 5-month period until September 1995 to achieve the fundraising target.

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Over the summer of 1995, the community organized a range of fundraising events (**informal enjoyment to active engagement**). This included a plant sale at Kinross show, a sponsored walk-in-the-woods, collections in local pubs and a donation from a local hotel. The £10,000 raised this way was match funded by Perth and Kinross Council. In response to the success of the community in raising funds, Scottish Natural Heritage (SNH) contributed £38,000 to the project, while a further £8,000 was granted by the National Lottery Heritage Fund and the Ramblers' Association. The remaining funds were covered by WT on the basis of pledges.

The objectives of WT in terms of woodland management were to restore the native woodland and the peat bog, which had become inactive due to drainage put in by Forest Enterprise. Peat bog habitat was becoming increasingly rare in Scotland at that time and letters of support were therefore received from Botanical Enterprise and Plantlife. In addition to improving the value of the forest for wildlife, WT and the community also agreed on opening up new paths to improve the amenity value for visitors.

In January 1996, Portmoak Community Woodland (Steering) Group (PCWG) was formed by interested members of the community who had been involved in the initial fundraising efforts. Around this time the woodland also officially changed ownership. It became the first example whereby a forest with a commercial purpose was sold off by FC to a community and/or charity. Since acquisition, Portmoak Moss has been managed by the Woodland Trust in collaboration with the community. The progression of engagement at this stage was from fund raising **active engagement** to **decision-making**.

Additional woodlands in the community were acquired by The Woodland Trust in 1998 (Kilmagad Wood) and 2008. This was done using a similar model to the initial acquisitions by a combination of pledges and fundraising by the community.

Although restoration of the bog and native woodland were important priorities from the start onward, it was not until 2005 before major felling of conifers was completed. Work on blocking drainage channels in Portmoak Moss in order to restore the raised peat bank did not start until recently and is on-going.

## 2. Challenges, barriers and opportunities for change: Key issues in evolution

### Facilitating factors

- **Connections between members of PCWG and the Woodland Trust**, which provided the main funding for woodland purchase.
- **The active involvement of Forest Enterprise** by the PCWG throughout the community consultation process. This has likely been instrumental in seizing the opportunity of purchasing the forest before it was put on the market.
- **External funding** in order to enable the purchase of all three woodlands.
- Scotlandwell and Kinnesswood have a very active community with regular events (e.g., Portmoak festival) being organized in the community hall. As a result, community members bear **high levels of inventiveness, entrepreneurialism and motivation**, which benefited the organisation of events in the forest and resulted in the fundraising campaigns to be very successful on all occasions. These traits were also instrumental in successfully preventing Portmoak Moss to be sold to a private party.
- Woodland management has benefited from **knowledge exchange with habitat experts**. To this end, PCWG organized a “Boginar”, which was a seminar with experts on development and management of raised bog and mosses. This resulted in valuable insights as well as a grant by SNH to improve dams, inhibit birch regeneration and prepare a detailed management plan. Therefore, the “boginar” has facilitated the management of this vulnerable habitat within the woodland.

### Barriers

- PCWG was offered to lease Portmoak Moss on a peppercorn rent basis by WT, which would have enabled them to engage in full woodland management. The group decided to decline this offer because of **the continuous fundraising requirement** that full management would bring about.
- In August 2014 PCWG received funding, primarily from the Living Lomonds Landscape Partnership, but with supporting funds from SNH and also in kind effort from the Community Woodland Steering Group. These funds are for the development of a dedicated raised bog management plan. This plan will identify development opportunities which will form an addition to the basic WT management plan and these opportunities will be implemented if specific funding for any

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of becomes available later on. **The bureaucracy and lengthy time frame associated with funding applications** such as these has been experienced as discouraging.

- The PCWG steering group membership has remained very stable over the years. A challenge to group development has been the recruitment of new members.
- A challenge to habitat management of the raised bog is the **high water level in the raised bog**. This needs to be lowered in order to stop birch regeneration on the fringes. The Woodland Trust and PCWG plan to deal with this through putting a mulching machine across the bog to remove existing tree stumps.
- Bog restoration has also been challenged by a **lack of available funding and expertise**. The WT prioritise woodland management over bog management.
- There has been a **disagreement with a neighbouring landowner** around granting access to woodland visitors walking along the perimeter of his land to access Portmoak Moss. These problems have now been overcome due to intervention by the Community Council.

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### 3. Evolution of income streams

Although in most years PCWG generated income through fundraising and donations, there have been a few years in which the majority of income (60-70%) was obtained through match funding. That is, for each of the three woodland plots that have been purchased by the WT in Portmoak, PCWG contributed c. £5,000, which was doubled through match funding. The need to raise capital and find match funding was clearly linked to the purchase of woodland plots and the realisation of PCWGs on-going projects.

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### 4. Woodland history and change: Benefits and impacts before group involvement

Before community involvement, Portmoak Moss was owned by Forestry Commission for productive woodland purposes. Kilmagad Wood and the third field were owned by local landowners, who used these areas of land for livestock grazing.

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## Portmoak moss:

Time Period	Owner/Manager	Objectives / Benefits (and evidence)	Major operations	Access and use rights
1960 - 1996	Forestry Commission	Productive woodland	Tree planting Putting in drainage ditches	Right to roam – it was widely used for recreational purposes

## Kilmagad wood + third area of land:

Time Period	Owner/Manager	Objectives / Benefits (and evidence)	Major operations	Access and use rights
c. 1856 - 1998	Local landowners	Farming (rig and furrow marks on lower slopes, abundance of paths on early map), production of firewood		Right to roam – used as access to Bishop Hill

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## 5. Woodland history and change: Benefits and impacts since group involvement

Portmoak Moss, Kilmagad Wood and a third area of land are managed by WT on behalf of the community of Portmoak to preserve and improve access and amenity value for visitors. This is done through felling the productive woodland and replanting this and open ground with more varied, native tree species. In addition, new paths, visitor facilities and interpretation panels have been provided as well as a community orchard in Kilmagad Wood.

Conservation and habitat restoration activities are undertaken to improve the biodiversity and protect the increasingly rare raised peat bog habitat. Apart from the aforementioned planting of native tree species, this also involves restoration of the

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raised peat bog in Portmoak Moss. This is done through felling trees, blocking drainage channels and removing naturally generated tree saplings. The coniferous plantation is felled sequentially to maintain the woodland character of the site.

PCWG organises a variety of forest-related events to maximize the benefits of this asset for the community. This includes: A Portmoak Moss lantern event, moths and butterflies identification, a fruit tree pruning course and volunteer days.

## Portmoak moss:

Time Period	Owner/Manager	Objectives / Benefits (and evidence)	Major operations	Access and use rights
1996 -	The Woodland Trust / PCWG	<p>Conservation and habitat restoration (Perth &amp; Kinross bird survey)</p> <p>Improve access and amenity value (visitor counters)</p> <p>Education and quality of life (programme of events)</p>	<p>Clearing trees and birch regeneration from raised bog, blocking drainage channels in raised bog, clearing Rhododendron.</p> <p>Improving path infrastructure, installing interpretation panels and benches, remedial work on unsafe trees, path clearing</p>	Right to roam, Land Reform Act (since 2003)

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## Kilmagad wood + third area of land:

Time Period	Owner/Manager	Objectives / Benefits (and evidence)	Major operations	Access and use rights
1998 – (A third area was purchased in 2008)	The Woodland Trust / PCWG	Conservation  Improve access and amenity value	Planting native trees and shrubs,  Creating an orchard, installing interpretation panels	Right to roam, Land Reform Act (since 2003)

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## 6. Future Plans

Since the Woodland Trust has limited expertise on the management of raised bog habitats, and is somewhat reluctant to keep on investing in the management of the raised bog, PCWG plans to commission and fund a raised bog management plan themselves. This plan will run alongside the wider WT management plan for Portmoak Moss. To this end, they recently organized a “boginar” with experts in various aspects of raised bog development, management and restoration. PCWG aims to fund the development of the management plan by applying for external funding. This has now been awarded by SNH.

## 3. Engagement and impacts timeline

Year	Event	ENGAGEMENT	Reasons (Barriers and challenges)	Changes /Impacts and outcomes Social (evidence)	Changes /Impacts and outcomes Woodland (evidence)	Changes /Impacts and outcomes Financial /Economic (evidence)
1994	Portmoak Moss considered as a potential sale case by FC	INFORMAL ENJOYMENT to ACTIVE ENGAGEMENT	To preserve (access to) the woodland	Baseline	Baseline	Baseline
1996	Group formation and purchase of woodland by WT	ACTIVE ENGAGEMENT to DECISION MAKING	To represent the interests of the community in decision-making around forest management	Increased visitor numbers (visitor counter)	Tree felling, peat bog restoration, tree planting, new paths and visitor facilities	Grant funding