



The Association of Gardens Trusts

**Historic Landscape Project - Southeast
2010-2013**



Methodology & Evaluation Report

Volume I

Historic Landscape Project Southeast 2010-2013

Methodology and Evaluation Report

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Tree identification in parkland with Kent Gardens Trust - Godinton Park, Kent - October 2011

Historic Landscape Project Southeast 2010-2013

Methodology and Evaluation Report

i. Executive Summary

i.i. Introduction

The Historic Landscape Project was a 3-year partnership project (2010-13) between the Association of Gardens Trusts (AGT), English Heritage (EH) and Natural England (NE), delivered via the post of Historic Landscape Project Officer (HLPO). It was devised to support County Gardens Trusts (CGTs) in the southeast government region to play a greater role in the conservation of historic designed landscapes, particularly parkland, through capacity building and increased exchange of information with project partners and other key players in landscape conservation. The project focused on historic parkland in acknowledgement that over 50% of this landscape type had been lost in the region between 1918 and 1995.¹ The CGTs encompassed by the southeast government region are Berkshire, Bucks, Hampshire, Isle of Wight, Kent, Oxfordshire, Surrey and Sussex. The project was managed through a steering group of representatives of each of the stakeholders. It was funded by EH and NE for 2 years, and by EH and AGT in year 3.

There were 6 key objectives sought through the project:

1. The identification and development of holdings with historic designed landscapes for potential Higher Level Stewardship (HLS) agreements through the collation and interrogation of local and regional datasets.
2. An improvement in the protection of historic designed landscapes, through Higher Level Stewardship agreement, across the southeast region.
3. The establishment of an information network of county garden trusts (CGTs) that will be able to provide the parties with a legacy of historic landscape advice.
4. The building of awareness and capacity within the county garden trust volunteer groups through training events, meetings and telephone advice, to enable them to better support the national historic environment agenda.
5. The provision of specialist advice and increased capacity to deliver agri-environment objectives and targets.
6. The improvement and promotion of partnership working and data exchange with HE bodies, especially the Garden History Society (GHS), the UK Parks and Gardens database (P&GUK) and the county Historic Environment Records (HER).

Accompanying this report are a number of appendices, many of which are intended as a resource and therefore offered as separate files for download via the AGT website with full permission from AGT for their re-use.

This report reflects the experience and views of AGT on the project and does not necessarily represent those of EH and NE.

¹ English Heritage *Heritage Counts 2005 – the State of the Historic Environment 2005*

i.ii Project Legacy

i. Highlighting priority parkland sites

The GIS information is available to NE teams to assist with prioritisation of sites for HLS funding, and there is the potential for wide sharing of the GIS layer and spreadsheet lists, including with EH, HERs and protected landscape bodies. There is a mechanism in place for NE teams to contact CGTs and vice versa regarding input into HLS applications, and the links with NE allow for new sites to be added to the spreadsheet by CGTs.

ii. Web Forum

Now established, the Web Forum can be relatively easily maintained, either by a volunteer or with low level moderation by AGT staff. This central repository allows for easy exchange of good practice, ideas and queries by CGTs nationally, and download of training course materials and other such resources.

iii. Regional Forum

The principle that CGTs can constructively come together on a regional basis for an annual Regional Forum has been established. Such meetings bring together not only CGTs to discuss common issues and problems, but also offer stakeholders an opportunity to address and update groups of representatives. It can be organised and hosted by each CGT in turn as an annual event – NE and EH have committed to attending future forums to give updates and help maintain links.

iv. Training Courses

All presentations and handouts from the training courses are available through the Web Forum. Some could be delivered locally by knowledgeable CGT volunteers using these bespoke materials; others could be delivered by commissioned professionals. NE has committed to deliver a session on HLS for parkland training or similar. Short presentations on relevant topics are available on the Web Forum for delivery locally, with handouts – these could be added to by CGTs.

v. Partnership with The Garden History Society (GHS)

A closer working relationship with the GHS has been established at an operational level, through delivery of planning training and advice, and the understanding of issues gleaned through the HLP being embedded in devising the work plan for the new AGT/GHS Joint Conservation Committee.

vi. Contribution to Wider Conservation Agenda

CGTs are fully aware of EH's Heritage at Risk agenda, Local Listing, and the importance of links with Historic Environment Records (HERs) and Local Planning Authorities, along with ideas for how to formulate projects to address these.

More CGT researchers now appreciate the importance of providing research material in a consistent, concise format and its huge relevance for conservation through the planning system, local listing, HER etc. There are concrete links with HERs in at least 3 counties, leading to ongoing CGT projects.

The project has raised the profile and importance of historic parkland in general, and the importance of ensuring CGT research takes it into account, hence contributing to its conservation.

vii. Addressing CGT Structural Issues

The project has emphasised and re-established the importance of devising projects as a way of recruiting and retaining volunteers, along with highlighting the possibilities of HLF funding. Informal

links have been strengthened between Trusts within the Region, and some beyond. The profile of CGTs has been raised with historic environment bodies such as the HERs, and southeast protected landscape bodies (AONBs, NPs), and some CGT committees have a wider understanding of the conservation context within which CGTs are working. At least 5 CGTs have redesigned their approach to research to have a specific conservation focus, or developed or rejuvenated initiatives to this end.

viii. Network of Support

The AGT and GHS also have a better understanding of the key issues affecting the capacity, and therefore ability, of CGTs to undertake conservation activities and can therefore plan accordingly to provide support to address these.

More HER teams have begun to appreciate the opportunities that working directly with CGTs can offer in terms of assistance to increase the information on the county HER and also develop the links between the HER and the use of this information directly for conservation eg through development of local lists, for consultation on planning applications, and detailed information for HLS reports.

EH has expanded their relationship with CGTs (although this was limited due to the lack of a Landscape Architect for the region in the course of the project): direct contacts have been formed, and strategies to work with some At Risk landscape owners has been enhanced by the relationship and contacts with CGTs.

The project has helped to develop the knowledge and understanding of historic parkland and its conservation amongst NE Land Management officers working on HLS schemes. This includes the potential relevant information available from CGTs, the importance of managing historic parkland to take into account its historic significance, and the possibility that the 2 perspectives, heritage values and ecological values, can co-exist.

The AGT has been able to deliver direct support to CGTs in the region and pro-actively assist in their development. This has given the AGT an opportunity to better understand the issues facing CGTs and how support can be tailored to address these. The project has also provided a methodology for expansion of the project to other regions. The AGT can use this information to develop its organisational strategic plan.

ii. Acknowledgements (in alphabetical order)

Particular thanks are due to the members of the Historic Landscape Project Team
Jo Barnes – Historic Environment Lead Adviser, South East Region, Natural England
Lorna McRobie – Association of Gardens Trusts
Verena McCaig – Historic Landscape Project Officer, Association of Gardens Trusts
Paul Roberts – Inspector of Ancient Monuments, South East, English Heritage
Catherine Tonge – Lead Adviser, Landscape Scale Delivery Team, Natural England
Sally Walker – Chair, AGT (until 9/2012)
Lisa Watson – Treasurer, Association of Gardens Trusts

The project was assisted by numerous people across many different organisations to whom we extend our thanks. Particular thanks go to the following for their contributions:

County Gardens Trusts

Berkshire Gardens Trust – in particular Fiona Hope, Bettina Kirkham, Ben Viljoen, Gaila Adair, Liz Ware
Bucks Gardens Trust – in particular Sarah Rutherford, Charles Boot
Hampshire Gardens Trust – in particular Janice Bennetts, Tony Hurrell, Sally Miller
Isle of Wight Gardens Trust – in particular Helen Thomas, Vicky Basford, John Harrison
Kent Gardens Trust – in particular Elizabeth Cairns, Hugh Vaux
Oxfordshire Gardens Trust – in particular Sally Stradling, Joanna Matthews, Max Askew
Surrey Gardens Trust – in particular Don Josey, Jill Leggatt
Sussex Gardens Trust – in particular Jennie Starr, Barbara Abbs

Peter Atkinson – Landscape Architect, Hampshire County Council (to 7/2011)
David Brock – Principal Inspector Historic Buildings and Architecture, South East, English Heritage
Dr Andy Brown – Planning and Conservation Director, South East, English Heritage
Richard Clarke – South East & East Protected Landscapes
Nick Davis & Sarah MacLean – Heritage Information Partnerships, English Heritage
Gilly Drummond – President, Association of Gardens Trusts
Teresa Forey-Harrison – Co-ordinator, Association of Gardens Trusts
The Garden History Society – in particular Dominic Cole, Jonathan Lovie, Linden Groves
Ruth Garner – Historic Environment Lead Adviser, Southeast Region, Natural England
Kate Harwood – Hertfordshire Gardens Trust
Virginia Hinze – John Hinze Ltd
Lyndsay Hughes – Local Engagement Adviser, South East English Heritage
Philip Masters – ACTA
Charlotte McLean – Landscape Architect – South East, English Heritage (to 2/2011)
Mark Rogers – GIS Lead Adviser, South East Region, Natural England
David Scully – Landscape and Biodiversity Officer, Tunbridge Wells Borough Council, Kent
Steffie Shields – Chair, Association of Gardens Trusts (from 9/2012)
Jane Sevenoaks – Land Management Adviser, Natural England
Rachael Stamper – Project Manager, Parks & Gardens UK
Matthew Tickner – LUC/Cookson & Tickner
Andy White – Heritage At Risk Projects Officer, South East, English Heritage
Jenifer White – Senior Landscape Adviser, English Heritage

Sarah Wicks – Development Manager, South East, Heritage Lottery Fund
 Gareth Wilson – Local Engagement Project Officer, English Heritage
 Jane Wilson – Senior Advisor, Heritage Tax Exemption, Natural England

Historic Environment Record Officers in Berkshire, Bucks, Hampshire, Kent, Isle of Wight, Oxfordshire, Surrey, and East and West Sussex

Host training venues

Buxted Park, East Sussex
 Greys Court, Henley-on-Thames, Oxfordshire
 Juniper Hall Field Studies Centre, Surrey
 Michael Hall School, Kidbrooke Park, East Sussex
 The Orchard Centre, Hampshire
 Padworth College, Berkshire
 South Hill Park, Berkshire

iii. Acronyms and Abbreviations

| | |
|------------------|---|
| AGT | Association of Gardens Trusts |
| AONB | Areas of Outstanding Natural Beauty |
| BAP | (UK) Biodiversity Action Plan |
| CGT | County Gardens Trust(s) |
| CMP | Conservation Management Plan |
| EH | English Heritage |
| ELS | Entry Level Stewardship |
| ES | Environmental Stewardship |
| FEP | Farm Environment Plan (NE requirement prior to HLS agreement) |
| GHS | The Garden History Society |
| GT | Gardens Trust(s) |
| HELA(s) | Historic Environment Lead Adviser(s) (NE post) |
| HAR | Heritage At Risk |
| HER | Historic Environment Record |
| HLC | Historic Landscape Characterisation |
| HLP | Historic Landscape Project |
| HLPO | Historic Landscape Project Officer |
| HLS | Higher Level Stewardship |
| GIS | Geographic Information System |
| LPA | Local Planning Authority |
| NE | Natural England |
| NGR | National Grid Reference |
| NP | National Park |
| NPPF | National Planning Policy Framework |
| P&GUK | Parks & Gardens UK Database |
| PP | Parkland Plan |
| SEEPL | South East and East Protected Landscapes |
| SM | Scheduled Monument |

iv. Selected Glossary

The Garden History Society (GHS)

The GHS is a national voluntary organisation dedicated to the conservation and study of historic designed gardens and landscapes. It campaigns and lobbies government on all aspects of historic landscape conservation and is a statutory consultee on all planning applications relating to parks and gardens on the English Heritage *Register of Parks and Gardens of Special Historic Interest*.

<http://www.gardenhistorysociety.org>

Heritage At Risk Programme / Heritage At Risk Register

The Heritage At Risk Programme (HAR) was launched in 2008, as a way of understanding the overall state of England's historic sites. In particular, the programme identifies those sites that are most at risk of being lost as a result of neglect, decay or inappropriate development. The Heritage At Risk Register is a list of those sites most at risk of being lost, and most in need of safeguarding for the future. This assists in focusing resources on understanding and tackling the underlying reasons for this risk. EH has created an online searchable HAR Register, and in 2012 created specific regional teams to focus on supporting solutions for these heritage assets. <http://www.english-heritage.org.uk>

Higher Level Stewardship (HLS)

Environmental Stewardship (ES) is an agri-environment scheme administered by Natural England that provides funding to farmers and other land managers in England to deliver effective environmental management on their land. Higher Level Stewardship aims to deliver significant environmental benefits in priority areas, including historic environment. It involves more complex environmental management requiring support and advice from local NE advisers, to develop a comprehensive agreement that achieves a wide range of environmental benefits over a longer period of time. HLS agreements last for ten years. <http://www.naturalengland.org.uk>

Historic Environment Records

Historic Environment Records (HERs) are the mainly local authority-based services used for planning and development control. They also operate a public service and fulfill an educational role. These records were previously known as Sites and Monuments Records or SMRs. The name has changed to reflect the wider scope of the information they now contain or are aspiring to maintain. They are essentially detailed records of all statutory and non-statutory heritage assets in a county, along with details of investigations. <http://www.heritagegateway.org.uk/gateway/>

Local Listing

Local lists are locally led and devised lists of significant local heritage assets that currently have no statutory designation. They play an essential role in building and reinforcing a sense of local character and distinctiveness in the historic environment. Local lists can be used to identify significant local heritage assets to support the development of Local Plans. Once such a list has been adopted as part of the Local Plan, this becomes a material consideration in deciding on permission for proposals for change to those assets. <http://www.english-heritage.org.uk>

Parks & Gardens UK

Parks & Gardens UK is an on-line resource for historic parks and gardens providing free public access to information on UK parks, gardens and designed landscapes and all activities concerned with their promotion, conservation and management. It is an independent charity.

<http://www.parksandgardens.org>

Methodology and Evaluation Report

1. Introduction

The English Heritage report *Heritage Counts* of 2005 highlighted the loss of more than 50% of historic parkland in the southeast region between 1918 and 1995.² The underlying causes were noted to be change of land use from pasture to arable, development, neglect, or mismanagement.

This report outlines the methodology and outcomes of the Historic Landscape Project, which aimed to address this loss of historic parkland through slowing further loss and restoration of damaged parkland landscapes, largely through the improved targeting of Environmental Stewardship funding. The project was conceived as a pilot partnership project to assess whether County Gardens Trusts (CGTs) could play an active role in the promotion of Environmental Stewardship, an agri-environment scheme administered by Natural England, for the conservation of historic parks and designed landscapes. Integral to this approach was the potential to enhance the knowledge and skills of volunteer members of the CGTs in order to better fulfil this advisory role.

The project was implemented in the southeast of England government region in which 8 County Gardens Trusts are active, covering the 9 counties: Berkshire, Bucks, Hampshire, Isle of Wight, Kent, Surrey and Sussex. They are all independent voluntary organisations and educational charities set up to protect and sustain their county's gardens, landscapes, parks and green spaces. The project was led by the Historic Landscape Project Officer on behalf of project partners, English Heritage, Natural England, and the Association of Gardens Trusts. It comprised a number of different strands of activity which had the common thread of conservation: prioritising parkland landscapes for targeting Environmental Stewardship funding through use of GIS mapping and local information; devising training and networking to support development of volunteers' knowledge and skills; developing links within the partner organisations to facilitate the better exchange of information.

2. Background

2.1 Partner Organisations

2.1.1 Association of Gardens Trusts (AGT)

The Association of Gardens Trusts is a national charity and the umbrella body for 35 independent charitable organisations, County Gardens Trusts. The AGT promotes the research, conservation and enjoyment of parks, gardens and designed landscapes in England and Wales. www.gardenstrusts.org.uk

2.1.2 English Heritage (EH)

English Heritage is the government's statutory advisor on the historic environment. It is an executive Non-departmental Public Body, responsible to the Secretary of State for Culture, Media and Sport (DCMS). www.english-heritage.org.uk

2 English Heritage *Heritage Counts 2005 – the State of the Historic Environment 2005*

2.1.3 Natural England (NE)

Natural England is the government's statutory advisor on the natural environment. It is an executive Non-departmental Public Body responsible to the Secretary of State for Environment, Food and Rural Affairs (DEFRA). Its purpose is to protect and improve England's natural environment and encourage people to enjoy and get involved in their surroundings.

www.naturalengland.org.uk

2.2 Background to Project Development

The Historic Landscape Project was conceived by Jo Barnes of Natural England South East Region, and Paul Roberts of English Heritage South East Region, at a quarterly stakeholder relationship meeting at the beginning of 2009, in response to the need for enhanced capacity to deliver a series of shared business objectives. In accordance with the terms and conditions of English Heritage capacity building grants, the project required an external body to host the project. The Association of Gardens Trusts was considered the most suitable body, with an established focus on conservation, a potential reservoir of the appropriate skills and knowledge in its members, and a track record in delivering projects. Therefore Sally Walker, then Chair of the Association of Gardens Trusts, was approached by English Heritage to help deliver the project.

Being a new partnership between the public and voluntary sectors, setting up the project took some considerable effort. However, in 2010 AGT invited a volunteer member, Lorna McRobie, founder of AGT and then Vice-President, to assist AGT in managing and delivering the project, particularly in the recruitment and line-management of the project officer.

By January 2010 recruitment began for the Historic Landscape Project Officer (HLPO), with an expected project start of 1 April that year. Following public advertisement, short-listing, and competitive interview using a person specification agreed between the partners (see **Appendix 1**), a well-qualified London-based HLPO, Verena McCaig, was appointed, and by agreement started work 15 April 2010. Though academically qualified, her experience of rural historic landscapes was limited and initially gave NE some concern. However, her interpersonal skills and experience in the community and voluntary sector, combined with knowledge of historic landscape conservation, made her a very successful appointment which hugely helped shape and deliver the project outcomes.

2.3 Expected Outcomes of Project (April 2010)

The outcomes that were set for the project at the outset were broad. This was in acknowledgement that the project was a pilot and the factors that would influence the direction and outcomes were relatively unknown until the project got underway eg the level of interest and uptake amongst the 8 CGTs in the region.

The project outcomes were established as follows:

1. The identification and development of holdings with historic designed landscapes for potential HLS agreements through the collation and interrogation of local and regional datasets.
2. An improvement in the protection of historic designed landscapes, through Higher Level Stewardship agreement, across the southeast region.
3. The establishment of an information network of County Gardens Trusts (CGTs) that will be able to provide the parties with a legacy of historic landscape advice.
4. The building of awareness and capacity within the County Gardens Trust volunteer groups through training events, meetings and telephone advice, to enable them to better support the national historic environment agenda.

5. The provision of specialist advice and increased capacity to deliver agri-environment objectives and targets.
6. The improvement and promotion of partnership working and data exchange with historic environment bodies, especially the Garden History Society, the UK Parks and Gardens database and the county Historic Environment Records.

These outcomes were broken down into objectives for each year of the project, and targets and expected outputs extrapolated from these.

2.4 Project Stakeholder Group

The project was steered via a Project Stakeholder Group comprising representatives of the partner organisations as follows:

- Paul Roberts – Inspector of Ancient Monuments, South East Region, English Heritage
- Charlotte McLean – Landscape Architect, South East, English Heritage (to 2/2011)
- Jo Barnes – Historic Environment Lead Advisor, South East Region, Natural England
- Catherine Tonge – Lead Adviser, Landscape Scale Delivery Team, Natural England
- Sally Walker – former Chair, Association of Gardens Trusts
- Lorna McRobie – Association of Gardens Trusts
- Lisa Watson – Treasurer, Association of Gardens Trusts (from 2011)
- Verena McCaig – Historic Landscape Project Officer, Association of Gardens Trusts

The membership of this group remained static throughout the project, in spite of some changes of professional role during that time, excepting the EH Landscape Architect who resigned from the organisation. This group stability gave significant consistency and understanding of the issues involved in the project, and allowed time for constructive working relationships to develop, which greatly assisted in planning and problem solving.

2.5 Project Monitoring and Management

From the outset, to facilitate project development and build confidence between the 3 partners, a robust project management and reporting system was agreed and established. This stakeholder group met quarterly with the HLPO, Verena McCaig, to review progress reports and the project budget. These reports were structured in table form to demonstrate progress against targets with a 'traffic light' system of risk management applied ie red, amber, green, to indicate likelihood of target achievement – see example at **Appendix 2**. This was accompanied by a narrative report on progress, exceptions, and matters requiring resolution. Action points for the HLPO and stakeholders were drawn out of these discussions.

An annual report was also produced to summarise key events in the project. These were approved at the monitoring meetings and subsequently published on the AGT website for public use (**Appendix 3**).

The HLPO was directly employed by the AGT, and line management and supervision provided by Lorna McRobie on a voluntary basis on its behalf. The HLPO was employed full time, 35 hours per week, from April 2010 to March 2012, then 4 days or 28 hours per week to March 2013 as a result of loss of funding outside of project control. Minimal administrative support was provided for the project eg for training course bookings, by the AGT Co-ordinator.

The regular input from partners, and their structured and openly supportive approach, though sometimes critical and challenging, was key to delivery of project outcomes. In addition, and despite

various unexpected changes, the same HLPO remained employed by the project for the whole 3 years. This proved to be critical to the considerable success of the project. In particular the HLPO was able to build up, retain, and develop relationships with the 8 CGTs in the southeast over a 3-year period.

A selected chronology of key events, courses and presentations is shown at **Appendix 4**.

2.6 Funding

A 3-year budget and cashflow for the project was agreed by all 3 partners in late 2009. These negotiations over project cost were detailed and essential in providing confidence to partners that the new venture costs would deliver the outcomes expected. Project costs were based on the costs of employing and managing a suitably skilled project officer (office based at the existing AGT office in central London), reporting and managing the project effectively, and providing sufficient funds for project officer expenses and resources to deliver the project outcomes.

Initially it was agreed that 50% of cash required would be delivered as Regional Capacity Building Grant from EH over 3 years 2010-2013 and 50% from NE delivered over 3 financial years 2009-2012. AGT as a small charity, and so having very limited cash resources, agreed to provide a non-cash contribution, using agreed day rates, for management of the project, line management of the HLPO, project administration, and financial reporting. Inflation of 3% per year was included in the project budget, but no contingency sum was allowed by EH under the grant conditions.

Following satisfactory progress on each quarter's targets, as agreed at the monitoring meeting, AGT submitted a grant claim to EH for funding for the previous quarter. After initial issues in AGT understanding what figures were required for EH claim forms, these payments were timely and regular. NE funding for 2 years (out of the expected 3) was paid in advance in financial years 2009-10 and 2010-11. However, this project funding, with due contract notice, was discontinued for Year 3, due to changes in central government priorities.

The difference in payment terms of funding streams for the project, (NE in advance and EH in arrears), led to some initial project accounting problems for AGT in managing the project. These were largely resolved by the (then new) AGT Treasurer Lisa Watson joining the project team in January 2011.

The announcement of withdrawal of project funding in 2011 from NE for Year 3 was a serious challenge, and threatened to close the project down. But the early indications of success in the project delivery, the good relationships built up between the 3 partners, and by them, with the HLPO, meant restructuring the whole project was extraordinarily possible and agreed in January 2012, even though at a reduced level of activity.

The resulting final year of the project was therefore delivered following AGT agreement, with some difficulty, to provide £10K of cash funding from its own resources. NE agreed to continue to provide important non-cash support for Year 3 in the form of a laptop computer, continued IT support, and essential staff input. EH agreed to increase its grant percentage (though not overall grant value), and the HLPO agreed to reduce working hours from 5 to 4 days.

A summary of the project budget is shown at **Appendix 5**.

2.7 Final Project Evaluation

This project has been evaluated against the original outcomes set in April 2010; it is acknowledged that there is considerable overlap between these outcomes and this is reflected in the narrative. Outputs and outcomes have been gathered through the course of the project via the quarterly monitoring reports and these have been drawn on to assess activity and delivery against the overall expected outcomes. Delegates on each training course were asked to complete a training evaluation report. The original data on structure and membership was collected again and comparison made. In addition, CGT Committees in the region were asked to complete a questionnaire on their experience of the project from their strategic perspective.



Checking the maps - Juniper Hall - October 2011

3. Evaluation against expected outcomes

OUTCOME 1

The identification and development of holdings with historic designed landscapes for potential HLS agreements through the collation and interrogation of local and regional datasets.

3.1 Approach

3.1.1 Gathering data

The project sought to broadly identify historic designed landscapes in the southeast region, with an emphasis on historic parkland, in order to support their conservation, primarily through HLS.

The HLPO completed a desktop exercise during the period April 2010 to June 2011 to collate lists of historic parks and gardens held by the 8 CGTs in the SE Region, EH and local authorities. CGTs were asked to contribute lists of sites for the project and to agree that this information could be used to collate the regional list of historic designed sites. These site names were entered into an Excel spreadsheet by county by the HLPO. Over 2600 entries were made. The sites include all types of designed landscapes of potential historic significance including designed parkland, deer parks, cemeteries, and walled gardens.

Originally, the approach was then to collect detailed information on site features, designations, and characteristics manually. This approach was used for the first 1500 entries on the spreadsheet but was found to be extremely time-consuming so another approach was sought.

From August 2011, it was decided that a new GIS layer would be created from this dataset of parks and gardens. To create this layer, each site was located by a 6 figure National Grid Reference (NGR) and 6 figure Easting and Northing, with a 200m radius polygon drawn from these points. Using the NE WebMap mapping system, any given 6 figure NGRs were checked by the HLPO. Where absent, the HLPO located the site on WebMap and noted the NGR. These grid references were pinpointed on the key building in the landscape where present; or if not apparent, a central point in the landscape was selected. Postcodes were added to the Excel spreadsheet for each site based on the six figure NGR using a grid reference conversion website.³ This was done to aid subsequent use of aerial photo mapping systems such as GoogleEarth.

A 200m radius polygon was then drawn from the each identified site NGR. This layer was then overlaid onto existing GIS layers and the site data interrogated and collected.

The following data sources were used to create the parks and gardens dataset (for detailed sources of site lists, see **Appendix 6**):

- **County Gardens Trusts/HERs** provided lists of sites thought to be of local historic interest, including those not yet fully investigated. A variety of criteria had been used by each organisation, not all of which were specified, but in general terms are thought to be designed landscapes over 30 years old (a criteria used by EH in compiling their *Register of Parks and Gardens of Special Historic Interest in England*, the 'Register').

3 www.streetmap.co.uk/streetmap.dll?GridConvert

- **Existing GIS datasets**, including the EH layer of Registered parks and gardens and a dataset denoted as 'historic parkland' on NE WebMap (GIS) system (polygons coloured lilac). These sites may or may not be surviving designed parkland and comprised data created for the Countryside Commission in 1995 from the presence of parkland as denoted on 1918 OS maps of the region. These sites were already mapped spatially as accurate polygons.
- **Lost sites**, ie sites that may have been ploughed out or built over, were omitted. Sites were also omitted if they could not be located with a reasonable degree of certainty. These site names have been collected for further identification and may be added in later.

3.1.2 Prioritising Sites for HLS

Once the collation of the historic parks and gardens data was complete and translated into spatial information, a series of existing GIS layers were overlaid onto the data to create a dataset that could be appropriately analysed for HLS priority sites. These layers were identified and agreed by the Historic Environment Lead Advisers (HELAs) and the HLPO as indicating HLS criteria and contributing to NE and EH heritage asset conservation agendas. In addition to the historic parks and gardens dataset, they included

- Heritage at Risk layers – parks and gardens, scheduled monuments only
- Historic parkland
- Sites of Special Scientific Interest (SSSI)
- Priority Biodiversity Action Plan (BAP) Habitat layers
- Environmental Stewardship (ES) agreement layers
- Registered battlefields
- Other NE priorities
- Country Parks

These layers were all assigned values (see also **Appendix 6**) which produced a total score for each site. This score, objectively, indicated the extent to which a site would meet agreed priority criteria for HLS and could be ranked in order of priority. However, this information needs to be used with care.

3.1.3 Data Issues

ES agreement data - This data is as of July 2012 and is potentially a good indicator of HLS potential – if a landholding has qualified previously for ES agreement, it is likely that it will be appropriate for HLS given the presence of other qualifying factors. However, the data does not distinguish whether there is only partial or minimal coverage by an agreement and therefore has limitations in terms of its indicative role.

Heritage at Risk data – This data is based on the datasets available to NE for 2010. It only assesses risk to designated historic assets; it includes Registered parks and gardens and scheduled monuments (SM) only, not listed buildings. The EH listed buildings dataset is not currently available as a GIS layer on NE WebMap.

Other NE priority – This data includes lists of 35 top historic environment assets in each county which have been identified by local authority historic environment record officers as priority sites for HLS within their counties; this is usually on the basis of archaeological assets rather than designed landscape features.

3.1.4 Applying the Data

The variables in the data notwithstanding, the above methodology was used to produce a list of the top priority historic designed landscapes with potential for HLS in each county. When about 35 'possible' sites had been identified per county, it was intended that these lists would be further discussed with CGT members and HER/Conservation Officers to identify those of most concern, or where investment of HLS could represent a significant return in conservation of historic parkland, working towards a short-list of 12 for pro-active approach by NE officers.

The HLPO carried out a rough desktop survey of the lists for 2 counties, including checking on the sites on GoogleEarth which was useful preparation for meeting with CGTs. The HLPO then held specific individual meetings to consider these lists with the lead volunteers on research and recording for Hants, Surrey and Sussex GTs. These meetings elicited some useful local information on the sites, such as knowledge of planned developments, key historic features including veteran trees, ownership, access, and particular vulnerability of some sites due to current use. Some sites were identified as being in exemplary management and not therefore a priority for allocation of scarce HLS funding. The exercise also highlighted that parkland sites had not necessarily had the focus of CGT research that garden sites had been given. Through these meetings, CGT members further appreciated the need to build a body of research evidence that could be made available via the HERs and P&GUK in order to inform Farm Environment Plans (FEPs) and consequent decisions on parkland plans and applicability of detailed HLS options.⁴

Following a national review of HLS funding in September 2010 which resulted in a more streamlined and targeted approach, with a consequent shift in project priorities over subsequent months, only the 'top 35 sites' lists were generated and the intended consultation process not rolled out across all 8 counties. What little time allocation was afforded NE in Year 3 was refocused to raising awareness of parkland and the partnership with CGTs amongst NE teams, and launch of the new dataset and its targeting properties. In addition there were issues regarding permission to publish restricted datasets for use by volunteers. These have now been resolved.

The resultant targeted dataset has been translated into a stand-alone, interactive pdf layer, currently for use by NE officers and CGTs but with potential to be shared more widely, with NE and EH permission, together with a spreadsheet displaying all of the background information and guidance notes required to manipulate the data meaningfully. This new parks and gardens layer is owned by NE and EH, and maintained by NE.

3.2 Discussion

Whilst the first approach (manual data collection) was time consuming, it did give the HLPO an in-depth understanding of the NE WebMap system and how this could feed into identification of parkland sites for HLS. This was valuable in working out priority criteria and understanding the constraints of the data. This study was also informed by a previous study carried out by consultants LUC for NE in April 2009, 'Priorities for HLS and the Historic Environment in London', the criteria used being largely similar. However, the LUC study only considered heritage assets on the National Heritage List whereas this new study has also covered non-designated historic landscapes – it is this factor that has broadened the scope for the potential protection of parkland.

⁴ A FEP is a structured survey of all environmental features on a farm, including historic assets – it is a prerequisite for an HLS agreement.

The delays and changes described have meant that the HLPO and HELA have not been able to fully trial the approach within the counties, either with the NE teams or with the CGTs. The final version of the dataset spreadsheet contains considerable guidance for both parties and it is to be hoped that this will be self-explanatory in making use of the information.

Unfortunately, because the dataset is regional rather than national, it could not yet be placed directly on to NE's WebMap system as a layer under current protocols. It therefore has to sit as a separate spreadsheet and pdf which does not support its regular use as well as its presence on WebMap might.

Historic Landscape Characterisation (HLC), conservation area and listed building datasets were not used to gather data on parkland. This was mainly because the project had been conceived to use NE's WebMap system which did not include these as GIS layers, neither would the project timetable have allowed for more in-depth verification of the sites identified using HLC.

The resultant dataset for the southeast is not considered exhaustive, but gives a broad indication of the potential resource of historic designed landscapes across the region. Sites may be added or removed in the future; information on each site may grow as further research is carried out. Future links to Parks & Gardens UK (P&GUK) should also prove useful in disseminating this information more widely.

The process of compiling a single dataset of historic parks and gardens has brought together information and datasets that had not been easily available, or in some cases generally known about. This in itself has been helpful in raising awareness of the extent of undesignated historic designed landscapes in the region, many of which are of potential national and local significance. They are now more likely to be recognised, reappraised and appropriately conserved. The process also highlighted the different stages that CGTs have reached in their research and the ways that they had approached the task. For example, Surrey GT had extensive datasets, prioritised as to whether initial research had indicated a landscape of potential value or little was currently known; Berkshire GT (the youngest CGT) had just begun to compile their datasets using various archival resources.

3.2.1 Data Applications

The datasets produced by the project could now be applied for a number of different conservation purposes, with refinement, for example:

- Identifying historic landscapes in Areas of Outstanding Natural Beauty (AONBs) and National Parks (NPs) to be considered for inclusion in the management plans for these protected landscapes – presence of these landscapes in the plans will be a material consideration in the planning system*
- Identifying historic landscapes in Local Planning Authority (LPA) area – these can then be researched and refined by CGTs for consideration for local listing – again, presence on local lists will be a material consideration in the planning system*
- Identifying historic landscapes for CGT Research and Recording groups, to guide priorities for research, and indicate those landscapes about which little is known*

- *CGTs can work with HERs to ensure that verified landscapes are placed on the county HER, thereby increasing the probability that their historic value can be picked up in HLS agreements or planning applications. The sites can also be placed on the P&GUK database, expanding the potential uses of site information.*

Developing this system brought with it a number of opportunities for constructive engagement with different stakeholders as the mutual benefits were clear. The HLPO was able to meet with CGTs, NE teams, EH, HERs and others to explain the process and the purpose of the data collection. This also highlighted historic parkland as a priority landscape type for both research and conservation, and promoted the aims of the project generally.

It was also hoped that the existence of Conservation Management Plans (CMPs) or parkland plans would emerge during the exercise and could be noted on the spreadsheet but this information is by no means readily available. In the last year of the project, the Garden History Society (GHS) was commissioned by EH to undertake this study separately. Sharing such information should help to ensure that research efforts by CGTs are targeted and not unnecessarily duplicated for the purposes of recording essential conservation information (academic study and/or publication being a different issue).



C19 ice house, Greys Court, Oxfordshire – June 2012

OUTCOME 2

An improvement in the protection of historic designed landscapes, through Higher Level Stewardship agreement, across the southeast region.

3.3 Approach

3.3.1 Developing objectives

The intention in setting this outcome was for the targeting exercise described above to have highlighted, by 6 months into the project, landscapes that the HLPO would assist in moving into HLS with a target of 5 sites per year in Year 1 and 10 each in Years 2 and 3. However, the HLS programme was considerably redefined following the Comprehensive Spending Review in September 2010, which meant that it became more streamlined, targetted and competitive, thereby determining that only agreements containing high priority environmental assets could be considered. Within these new criteria, it was evident that fewer parklands would be considered eligible for HLS and so outcome 2 was considerably revised to include:

- The identification of high priority sites, through the GIS dataset, EH At Risk dataset, and CGT liaison, and assistance with gaining agreements through HLS or other means
- Raising awareness amongst NE teams and CGTs of the value of historic parkland in meeting multiple conservation objectives.

During the course of refining the datasets, and having made the decision to create a GIS mapping layer with the historic parks and gardens data collected, the focus of the HLPO's work was shifted to ensuring that the NE teams understood the potential benefits of working with CGTs, the historic and environmental value of historic parkland, and the particular vulnerability of historic parks and gardens, and indeed SMS, on the EH At Risk Register. This was intended to better establish the purpose and value of the prioritised datasets when available.

3.3.2 NE/CGT Information Exchange

The HLPO and HELAs embarked on a programme of presentations and discussion with each of the 5 NE teams in the southeast. The presentations explained the historic and ecological crossover of parkland, the parkland plan process and its purpose, the information and skills resources available through CGTs, and EH's At Risk programme, drawing on examples from the southeast.

The HLPO had introduced CGTs to the concept of working with NE on HLS agreements throughout the project, through meetings and updates. In August 2011, a bulletin was sent out to each CGT summarising the position that the partnership had reached to date (**Appendix 7**), and asking that each CGT identify a specific lead volunteer to field NE enquiries. With some further individual discussion, each CGT provided an e-mail address for a named contact or generic 'admin' role which would be regularly checked. These were, with express permission, shared with the appropriate NE team covering each county and also added to the AGT contact details database which is updated annually. NE is seeking ways to maintain regular CGT contact via newsletters or other updates to ensure that CGTs continue to appreciate their potential relevance in this scheme. NE HELAs have undertaken to attend an annual Regional Forum in the southeast in order to give a verbal update and answer queries.

Guidelines for CGTs on the type of information that NE officers would find helpful were drafted by the HLPO in conjunction with the HELAs and distributed to each CGT HLS lead volunteer. Similarly, tailored guidance was given to NE teams on how and when to contact CGTs, including when to include them in consultations on parkland plans (see **Appendix 8**).

To date, there has been limited contact with CGT lead HLS contacts by NE regarding HLS agreements. 4 CGTs report contact on specific sites. There has been a low level of exchange of information between NE and CGTs – this appears to be as a result of teething problems in communication and capacity on both sides. With the review of the Rural Development Programme for England⁵, NE capacity will increase and allow for increased NE mentoring of CGT lead HLS contacts.

NE/CGT Consultation – Case Study

Bucks GT were approached by their local NE team for advice on a parkland landscape in July 2012. The privately owned parkland site was to enter HLS but a parkland plan had not been identified as necessary to inform the basic HLS options proposed at that stage. As well as general observations on feature restoration, Bucks GT were asked specifically whether tree planting in the parkland would be appropriate, and if so, of what species and in what general configuration; also, for advice regarding restoration of a pond feature. NE sent through the advice they had received from the Bucks HER.

Bucks GT consulted the Bucks County Museum Service Gardens Register Review (1998), currently the main source of information on historic landscapes in the county, and also used OS map progression to consider the site development. They quickly established that the landscape possibly had early C16 century origins, and as such, had not been the subject of detailed study to discover its particular phases of development, identify its most important features (surviving or relict), and how these relate to the landscape design. They recommended that planting and restoration proposals should therefore not be carried out without further research and survey to address these issues, particularly as there was a danger of damage to hidden archaeology.

Bucks GT also posed a number of questions which review of immediately available archival information suggested eg the current form of the pond indicates a formal design – was its origin and function ornamental or as working fish pond, or both? They explained how this would affect ideas about its setting and water supply and therefore need to be taken into consideration in its restoration. They endorsed the suggestion by the County Archaeologist that a parkland plan be undertaken but suggested that an abbreviated plan looking at key areas could suffice if there were precedent for this. In summary, BGT advised against tree planting and pond restoration works until further investigations had been undertaken.

NE considered the advice of the County Archaeologist and Bucks GT and discussed the funding and commissioning of a parkland plan with the owner and tenant farmer, stating that they would not include such restoration works in the HLS agreement without further study. Parkland plans are funded 80% by NE and 20% by the owner. The owners declined to take this up, restoration not being a priority. The HLS agreement was still implemented but with the application of ecological and educational objectives. The archaeology of the landscape therefore remains intact although restoration still ideally required.

⁵ The Rural Development Programme for England is a rural funding programme joint funded by the European Union and the Government via DEFRA. The delivery of the programme is reviewed every 7 years.

The production of the dataset of parks and gardens, highlighting historic parkland, provided a platform to promote the conservation of this landscape type. In particular, the HLPO presented the project to the South East and East Protected Landscape Forum in May 2012 which resulted in a request to share the dataset of parks and gardens, sorted by AONB or NP area, for inclusion of historic parks and gardens in the respective protected landscape management plans.

3.3.3 Heritage At Risk

As the funding of HLS changed in Year 1 of the project, and the HLPO was unable to guide parkland sites through as expected, this also enabled considerably more work to be undertaken on EH At Risk heritage assets following the departure of the EH Landscape Architect (LA). The constructive working relationship that was built up between relevant EH officers and the HLPO during Year 1 of the project facilitated appropriate information sharing. The HLPO took on a small caseload of sites, identified by the departing LA as potentially appropriate for HLS, or with practical research projects that CGTs might be interested to take on, brokered by the HLPO. This 'brokering' role proved useful. The HLPO was able to make contact with owners from a relatively non-confrontational, non-statutory stance. This may have assisted in opening constructive dialogue and building relationships, and the structure of the project allowed sufficient time to develop this for a small number of cases.

Actions pursued as part of this project are summarised as follows:

| Type of Site | Grade | At Risk Issues | Actions |
|---------------------------|-------|--|--|
| School/pasture | II | Multiple ownership; development; deterioration of features; need for CMP to guide management | Engagement; advice; proposal for HLS followed through |
| School/golf course/other | II | Multiple ownership; deterioration of features; need for CMP to guide management | Engagement; advice; not eligible for HLS; HLF/EH funding advice given |
| School/housing/other land | II | Multiple ownership; revised site survey needed | Engagement with school; agreement for survey by CGT vols and future possible public opening |
| Hotel | II | Deterioration of features; disused inappropriate development; need for CMP to guide management | Refusal to engage |
| School/pasture | II | Multiple ownership; deterioration of features; need for CMP to guide management | Engagement; advice; proposal for HLS followed through |
| Arable/pasture | II | Multiple ownership; loss of vulnerable woodland features | Engagement with NE on existing HLS agreement; raised and recorded issues; engaged CGT for further research needed |
| Religious institution | SM | High risk SM in parkland | Engaged owners re parkland; promoted priority need for HLS agreement as HLF match-funding, to include CGT and parkland |

Through the second year of the project, there was considerable restructuring within NE teams and at least one officer was identified in each team who could take the lead on HLS applications that included historic assets. This assisted in smoothing the process of taking forward more complex parkland applications as the NE officer had a greater understanding of the issues involved and the importance of securing the funding for a parkland plan and therefore worked creatively to identify solutions. The probability of a positive outcome was increased.

3.4 Discussion

The funding changes to HLS and shifts in priorities clearly had an impact on the ability of the project to meet this outcome. However, the time invested in meeting the NE teams and working on the At Risk initiative should also prove valuable. Although not quantifiable, anecdotal feedback from teams and increased contact with the HLPO following visits, would suggest that NE teams have increased awareness of the vulnerability of historic designed landscapes, especially parkland.

3.4.1 NE/CGT Information Exchange

Whilst the direct contact between NE teams and CGTs has been limited, it is to be hoped that the contacts made can be resurrected and CGTs play an active part if the HLS programme is rejuvenated post the Rural Development Programme review of 2013. Newsletters and other contacts are important in the meantime in ensuring this relationship is sustained, particularly whilst there is limited local contact with teams regarding specific sites.

CGTs demonstrated considerable willingness to provide NE officers with useful information wherever possible in support of consideration of sites for HLS. This has been very limited to date, as explained. With a named contact it is hoped that the exchange of information will increase and the CGT experience build. CGTs could also develop structures to support their lead respondent eg by building records of named sites and researchers/members who know particular sites, for ease of reference. The case study quoted shows that such information can also help prevent inappropriate conservation activity being carried out.

The delay in completion of the GIS and database for limited publication has not yet made possible the sharing of data with the protected landscape bodies, but this further practical use has been highlighted and demonstrates the potential to use the data to afford a further layer of protection within the planning system.

3.4.2 Heritage At Risk

Because this project had established, as part of its raison d'être, that EH and NE would work together with AGT to address At Risk historic designed landscapes through HLS, this set up the expectation from the outset that these At Risk landscapes should be prioritised for consideration for this funding. This represented a significant step in itself, but in practice it took time to develop this joint approach. During Year 1 of the project, no At Risk landscapes were prioritised for HLS. However, in establishing and testing the priority criteria for parkland sites as part of the GIS process, it became clearer that, where parkland was present, these sites represented key target areas for both parties eg At Risk parkland landscapes frequently contain high priority Biodiversity Action Plan (BAP) habitat, fragile parkland habitats, often adjacent to or containing a Site of Special

Scientific Interest (SSSI).

The criteria used by the project to prioritise these designed landscapes for HLS did not include the presence of listed buildings, as explained in Outcome 1 (ie because the NE WebMap system used to create the dataset did not include these assets). As this is the largest group of heritage assets on the HAR Register, this is a significant omission. HLS Special Projects grant funding can contribute significant sums to conservation and restoration of historic farm and parkland buildings and these features of course contribute greatly to the fabric of historic designed landscapes.

Discussion between NE officers, the HLPO, and HELAs at NE team meetings particularly considered the issue of historic landscapes in divided ownership – this is a common vulnerability of At Risk landscapes and causes considerable difficulties for NE officers seeking to address conservation management risk to a landscape estate through HLS. Parkland plans are a necessity in understanding the complexities of these Registered landscapes, and, to be fully effective, should address the conservation management issues of a Registered landscape as a whole. However, the administration of HLS requires:

- a separate HLS agreement with each landowner*
- the contribution of 20% of the cost of a parkland plan from landowners*
- that the parkland plan must ‘sit’ with one landowner within an HLS agreement.*

Therefore, for a parkland plan to cover the entirety of an estate in divided ownership and hence start to address risk issues, it relies on the goodwill and considerable flexibility of neighbouring owners, as well as preparedness to fund and engage with a plan as part of a partnership. This is rarely achievable: it is unusual to find all landowners in simultaneous agreement to pursue the historic conservation of an estate through co-ordinated conservation management, each having their own priorities and constraints. Such an arrangement also requires considerable time commitment by the NE officer, which is unlikely to be possible given the number of Environmental Stewardship agreements and other initiatives that make up a single officer’s annual targets.

A further hurdle to At Risk landscapes entering HLS is the need for sufficient Entry Level Stewardship (ELS) ‘options’ (with allocated points) to be chosen by the landholder in order to qualify for sufficient points, with a target of 30 points per hectare of the registered holding. Qualification for ELS is a pre-requisite for most HLS agreements. The key problem with applying this to a well-wooded parkland is that there are no point scoring options for woodland management in ELS. Also, the points tend to be geared towards boundary maintenance and the open nature of parkland often diminishes this points scoring possibility – hence the landholder and NE adviser invariably have to find the required ELS points on grassland maintenance which is not always appropriate where there are in-field trees and an extensive designed landscape. This means that creative ways have to be sought to balance much-needed HLS options with perhaps more generic ELS options on such landholdings.



Preparing for site survey - Kidbrooke Park, East Sussex – November 2012

OUTCOME 3

The establishment of an information network of county garden trusts (CGTs) that will be able to provide the parties with a legacy of historic landscape advice.

3.5 Approach

In order to establish an information network of CGTs, it was important that the CGTs would have sufficient capacity to respond to demands of external agencies and the approach to this is laid out under Outcome 4.

The work carried out on Outcome 1 and 2, ie to develop links with CGTs for the exchange of information on potential sites for HLS agreements, led to the identification of key contacts in each CGT for this purpose.

3.6 Discussion

The system of identified CGT contacts for HLS should be sustainable as it is incorporated into well-established and ongoing administrative systems within AGT. It does rely on NE maintaining communication and updating CGTs in order for this to remain relevant. It would be more likely to be successful if local NE teams were encouraged to make direct contact with CGTs to develop the relationship outside of specific requests for information.

The CGTs can only provide historic landscape advice if they are maintaining membership and carrying out research and survey projects to develop knowledge of local sites. The steps described in Outcome 4 should support this and lead to more robust organisations, less vulnerable to collapse, and therefore available to inform the project parties.



Identifying parkland features – September 2012

OUTCOME 4

The building of awareness and capacity within the county garden trust volunteer groups through training events, meetings and telephone advice, to enable them to better support the national historic environment agenda.

3.7 Approach

The starting point for the project was to establish baseline information on the structure and membership of each CGT and so capture information on the active volunteer base who might be involved in research and conservation initiatives. This baseline survey gathered the following information:

- Date CGT established
- Number of members
- Current Chair
- Research and Conservation sub-groups and lead members of each
- Numbers of members of each sub-group, and numbers of *active* members
- Number of local planning authorities in county
- Current contact with external partners ie EH, NE, GHS, P&GUK, HERs

Whilst initially it was envisaged that skills audits would be carried out, the relatively low level of active membership soon indicated that there was a need for capacity building support at all levels. A basic leaflet was produced to give an essential introduction to the project (**Appendix 9**).

The HLPO met with each CGT, initially meeting with research sub-committees in order to collect data for the baseline survey and GIS layer, and to explain the project in terms of its HLS objectives. The baseline information indicated a low level of structured volunteer activity in most of the CGTs, either

in research and recording or conservation (responses to planning issues) – or both. These early discussions, coupled with subsequent attendance at CGT events, helped to build information for the HLPO as to the current level of contact with NE and EH and understanding of, and contact with, other external historic environment networks. The subsequent decision to establish the Regional Forum (see section 3.7.1) emerged from the realisation that there were common issues across the region, most notably ageing membership and difficulty in recruiting active volunteers, and that these could begin to be addressed as a group.

The baseline survey was repeated at the end of the project. Results indicated that the shift in overall numbers of members was minimal. However, 4 CGTs reported an increase in the number of members actively involved in research and recording activities, with 2 trusts formalising previously *ad hoc* groups of researchers. There was no significant change in the numbers of volunteers actively involved in conservation (planning) sub-groups.

There are at least 2 pivotal members in each CGT and it is through continued contact with these members that the HLPO developed good working relationships, and trust and confidence in sharing information. In gaining an understanding of the needs of the CGTs, the HLPO was able to start to draw in resources and broker cross-regional links with pockets of good practice.

The Kent Compendium Review Project⁶ emerged early on as a flagship project that began to address a number of key issues in Kent that had also now emerged as issues across the region: recruitment and training of volunteers for a specific and focussed project, supported by the local authority, with the outcome being clearly defined research reports with multiple conservation applications, not least Local Listing (see Glossary). This approach could be widely adapted for other CGTs and the HLPO also promoted it widely amongst HER officers to demonstrate the mutual benefits of supporting such projects. The consultant and former EH Register Inspector, Virginia Hinze (VH), who was involved in the Kent pilot project, was working with Kent GT to expand the project to Sevenoaks and this enabled the HLPO to attend events and develop ideas for suitable regional training approaches. The partnership that subsequently developed between the HLPO and VH was a critical factor in devising appropriate training with a practical focus that was tailored to the needs of CGTs. VH is also a long-standing and active member of CGTs and so has an excellent grasp on how they work.

The site dossiers produced by the Kent Compendium Review Project were invaluable in demonstrating to external stakeholders the approach and quality of report production of which CGT volunteers are capable with appropriate training and mentoring. The HLPO received frequent confirmation of this when discussing the dossiers with local authority, NE and EH officers.

3.7.1 Regional Forum

It had been expected that, having made initial contact with CGTs and got to know their basic operational structure, the HLPO would deliver 6 presentations introducing HLS and how CGTs could work with NE on agreements. The HLPO delivered 1 such informal presentation to the Research and Recording group of a CGT but the following discussions indicated that there were issues of capacity (ie numbers of volunteers vs number of different activities required) and priorities within the CGT itself that needed to be discussed prior to taking on new roles.

As a result, the HLPO adopted an alternative approach and convened a Regional Forum meeting in January 2011. Each CGT was invited to send up to 3 representatives to a day-long workshop which sought to start discussions on a number of key issues that had emerged as common problems for

6 <http://www2.tunbridgewells.gov.uk/default.aspx?page=3148>

CGTs, and to establish a common understanding of the benefits for CGTs in becoming involved in the wider conservation opportunities that could be brokered through the HLP. The outline agenda for the meeting is included as **Appendix 10**. The HLPO facilitated the day and invited speakers. 7 of the 8 regional CGTs sent representatives. The content and feedback from the day enabled the HLPO to develop more concrete ideas for ensuring the subsequent training programme could be tailored to be practically relevant.

The success and ongoing impact of the first Regional Forum led to this becoming an annual event; outline agendas, attendance and sample feedback are also noted at **Appendix 10**.

3.7.1.1 Discussion: Regional Forum

The Regional Forums enabled the project to develop a cohesive direction within the southeast CGT group – largely attended by the ‘movers and shakers’ in the trusts, they enabled delivery of the same key messages and instant feedback as to what issues and solutions there might be within the region. Post-event feedback suggests that it facilitated shifts for some CGTs as 2 or 3 members would have heard the same suggestions, be able to have constructive discussions, and not be a ‘lone voice’ if change was mooted. Having established the model and a regular venue, the meetings were not overly burdensome to organise. It would be possible to rotate these meetings around the region in the future, hosted by CGTs in turn, with invited speakers. However, the facilitation of these sessions by the HLPO was commented on by participants as being very useful as this injected information at appropriate points throughout about practice in other trusts and the historic environment sector as a whole, regionally and nationally. This constantly set discussions in the context of the tangible impact that CGT work could have on landscape conservation.

The Regional Forums and individual CGT contact also had an impact on the wider work of the HLPO. In having a good overall view of the work of the CGTs, strengths, patterns, and areas where external support could make a difference, this was used to inform discussions with external conservation bodies. The Forums were also attractive to strategic partners as an opportunity to deliver key messages, understand CGTs’ perspective, and network. This was particularly helpful to the GHS to explain the reasoning behind changes to working arrangements on planning casework, NE for the implementation of information exchange on HLS, and EH for their At Risk agenda and also the development of guidance on Local Listing. This latter guidance inspired further training in focussed research, coming as it did with the wider dissemination of the Kent Compendium Review Project practice. The combination offered both a methodology for projects and a potential conservation outcome for such research.

3.7.2 Other Capacity Support: Meetings, E-mail and Telephone Advice, Newsletters

After initially meeting with each CGT, the HLPO established key contacts in each one. These were not necessarily the Chairs, although all were members of their CGT Council (trustees). They were in a key position to pass on information to other members and also comment on how the project might be helpful. These contacts remained consistent throughout the project which proved very constructive; it enabled the HLPO to track issues as they developed and to pick up common issues between trusts. The HLPO could therefore facilitate contact between members and pick up on events and good practice that might be of interest to others.

Communication was usually by e-mail and sometimes telephone calls. Occasional one to one meetings were held but more often the HLPO would attend committee meetings, sub-group meetings or events – this was always done with a specific purpose in mind; whether to explain the project, explore options for CGT-level projects, or facilitate discussions when issues had become entrenched. The HLPO also contributed to meetings in at least 5 counties between CGTs and local authority officers. She was able to add the weight of other CGT experience and methodologies to assist in establishing new ways of working.

The HLPO delivered specifically tailored presentations to CGT committees, sub-committees and other CGT groups, including:

- AGT AGM 2010: Introduction to the Historic Landscape Project
- Berkshire GT – AGM keynote address: Conservation and the role of CGTs
- Bucks GT – New volunteers: Importance of research, and explanation of CGT training
- Hampshire GT – Research & Recording Group: Applying research to conservation
- Isle of Wight – Committee: Presentation and discussion re current conservation agenda
- Surrey GT – Research & Recording Group: to explain HLS
- Sussex GT – Committee: Conservation priorities of EH and NE and strategic importance for CGTs.

The HLPO also attended the committee meetings, at least once, of Bucks, Isle of Wight, Oxfordshire, Surrey and Sussex GTs to discuss progress or specific approaches to local projects, and met with individual contacts as appropriate to offer support at specific points in development of ideas.

E-mail and telephone support ranged from short follow-up to issues discussed in meetings, making connections and providing contacts or web links, to commenting on project proposals and funding bids.

Whilst this was done on an *ad hoc* basis through Years 1 and 2 according to the particular pattern of CGT activity and need, in the last 9 months of the project each CGT in the region was offered 2-3 days of dedicated HLPO time. In addition to ad hoc telephone and e-mail advice, this was taken up to varying degrees:

- Berks GT: keynote address at AGM; facilitation at joint EH *Settings* seminar
- Bucks GT: attendance at committee meeting; organisation of and attendance at meeting with Bucks HER re setting up research project; informal presentation at launch
- Hants GT: meeting to tie up loose ends, especially to discuss contact with NE re HLS
- IoW GT: meeting with committee and informal presentation on conservation priorities
- Kent GT: input into meeting with Kent CC re expanding KGT ability to respond to planning consultations, and subsequent informal meeting re general issues
- Surrey GT: meeting with HER officers and subsequently with SGT committee to discuss possible approaches to research project; meeting with key contact to discuss progress
- Sussex GT: input into locally delivered research training course; initial drafting of write-up of launch event for Hastings project as example of good practice.

In order to raise awareness of the project aims around linking research to conservation outcomes, and the availability of training to encourage volunteers to be more actively involved, the HLPO contributed several articles to CGT and AGT newsletters (see **Appendix 11**). The AGT *Yearbook* was launched in 2010 and the HLPO contributed a substantial article in each year of the project (see **Appendix 12**). In April 2012 a generic newsletter article was sent to all CGTs in the region which could be adapted to emphasise the priorities of each CGT – this was used by at least 3 CGTs.

3.7.2.1 Discussion: Other Capacity Support

The loss of the EH Landscape Architect after the first year of the project had an undoubted impact on the project. Charlotte McLean (CMcL), the previous postholder, had shown a commitment to working with CGTs and developing projects with them, as well as supporting their need to develop a wider perspective on conservation issues eg through attendance at the Regional Forum to talk about At Risk landscapes, and giving a lecture to Kent GT. The HLPO and CMcL had begun to look at further opportunities for collaboration. When the post was not filled (owing to the impact of the Comprehensive Spending Review in 2011), this was perceived by some CGTs as underlining the lack of emphasis placed on historic designed landscapes. However, the HLPO was able to pick up a number of threads established by CMcL and encouraged the CGTs to contact her directly if there were particular issues that needed resolution. Such contact was minimal; this underlines that much of the work needed between the organisations is proactive rather than reactive, and project-led. The small caseload carried by the HLPO (see section 3.3) did mean that she was able to use current examples of conservation practice in her presentations and training which is more engaging for audiences than plain theory.

The benefits of the project identified by CGTs during the course of evaluation were:

- *A clear point of reference for queries relating to CGT objectives*
- *Help to work out how to structure projects that are focused, achievable and with a visible outcome, and relate these to conservation*
- *Moral support and specific advice – access to a knowledgeable and motivational officer*
- *Encouragement to contact local authorities with regard to compiling local lists*
- *Encouragement to think afresh about the ‘whats’ and ‘hows’ of CGT approach*
- *Access to training courses that wouldn’t have been run locally at that stage, leading to a small but appreciable increase in the number of available researchers*
- *Training for volunteers and committee members*
- *Widening of consideration of designed landscapes to include NE interests*
- *Sharing ideas, issues and information with other trusts and hearing from related organisations at the Regional Forum*
- *Drawing the attention of EH and NE to sites of concern identified by the CGTs*
- *Provision of very helpful resources on a range of topics*
- *Some new or improved contacts – most commonly with HERs; some with NE.*

Where CGTs reported an increase in contact with other CGTs as a result of the project, these were both within and outside of the southeast region. Whilst the Regional Forum appears to have assisted these links, they also appear to have taken place as a result of connections made on training courses which were opened up to CGTs outside of the southeast, via the Web Forum, or due to signposting by the HLPO or other CGT members.

The groundwork of developing the various relationships was time-consuming, in conjunction with the data gathering exercise required for the prioritisation of parkland. Some trusts were in a significantly stronger position in terms of their development to take advantage of the project eg through being able to apply the guidance and knowledge gleaned from training courses to developing practical projects within their trust. However, of the 6 trusts that needed to reinvigorate existing projects or indeed start

completely from scratch, most were only taking steps to make these ideas operational in the latter part of the final year of the project. It takes considerable time for such small volunteer-led organisations to identify resources and commit scarce volunteer time to such schemes. The preparatory time needed can be considerable, particularly if committee support is ambivalent or divided, and if partner local authorities have to be persuaded to lend support. However, once the principle of establishing such a project has been fixed, a greater amount of the HLPO's time can be spent in recording and encouraging dissemination of good practice and occasional assistance with troubleshooting. It is the initial presentation and support for the impetus for change that can be particularly time-consuming. This is perhaps reflected in the evidence (from the baseline surveys) of increased numbers of active volunteers now involved in research and recording, but still little shift in numbers participating in conservation/planning, an area for which it is more difficult to develop a focused 'project' approach.

CGTs reported the following impacts of the project on their strategy:

- Making the link between research and how this can relate directly to conservation and appreciating that how this is presented has a direct impact on its application*
- Reinvigorating research activities*
- Recruitment and management of volunteers*
- Raising the profile of parkland landscapes*
- Recognition of the greater role that CGTs will play in conservation, particularly as a result of the changes at the GHS*
- Recognition of the importance of local listing.*

At least 3 CGTs reported no impact on their CGT's strategic approach – 2 of these had long-standing successful projects. The Committees of these 2 CGTs were also unable to complete the questionnaire from their perspective. This in itself indicated the level of impact that the project had had for those trusts: the project had not been seen to have such relevance for them, and contact was on an individual basis. However, in the final stages of the project it has become clear that there is a role for HLPO support in developing capacity for responses to planning, particularly as members of the long-established conservation committee of 1 trust have begun to retire and there have been no arrangements in place for succession.

3.7.3 Website and Web Forum

The AGT redesigned their website as the HLP was launched and the project was allocated a specific web page, accessed from a link low on the Home page. This web page was used to give basic information on the project, offer a pdf leaflet for download, and contact details. This was expanded in Year 2 to include detailed information on the training courses offered: what they aimed to do, who they were aimed at, and more details on content. Annual summaries of project progress were also included. In Year 2 the link to the page was made more prominent on the Home page in recognition of the growing interest in the project. Some CGTs reported difficulty in finding the link which became increasingly important when the link to the Web Forum was created on that page.

A key part of developing a network of information for the project was to increase the ways in which CGT members could easily exchange information with one another and download resource and training materials. In November 2011 the CGT Web Forum was established – this is a password-protected area accessed via a short registration process, accessed from the HLP web page on the

AGT website. It was set up using a stand-alone software package, IP Board from Invision Power Services, which has minimal start-up costs and on-going hosting fees. A screen shot of the front page of the forum is shown at **Appendix 13**.

The Web Forum was launched to CGTs in the southeast at the 30 November 2011 Regional Forum meeting where positive feedback was received. However, membership registration has been slow. It was promoted through the AGT Yearbook, local newsletters, and websites and as an important resource at training courses. During 2012 it was also promoted to CGTs outside of the southeast and this boosted membership and cross-organisational contact. The national spread of membership as at March 2012 is shown at **Figure 1**.

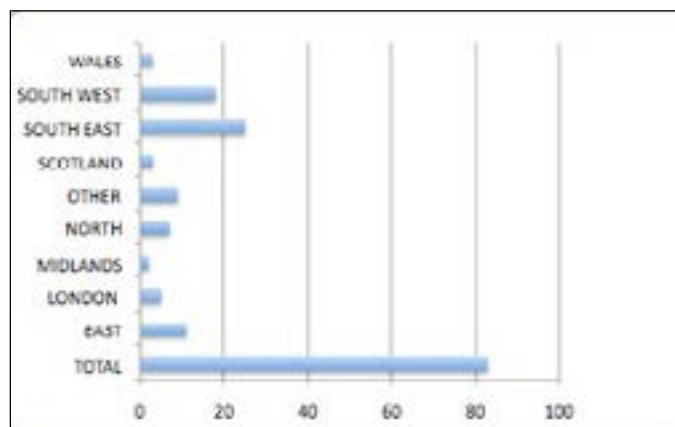


Figure 1 – Graph to show national spread of membership of Web Forum, March 2013

3.7.3.1 Discussion - Website and Web Forum

The project web page was initially given insufficient profile on the AGT website but this was later recognised and rectified. Websites are increasingly critical for the profile of projects and it was important that this page was easily found and regularly updated. The programme used for the website made page updates by the HLPO a straightforward process after minimal training. Social media wasn't used and this may well have been a missed opportunity. Using Twitter and/or Facebook could have highlighted issues or events of interest, kept members regularly informed and perhaps also encouraged more members to try using these media, hence encouraging their wider adoption; an important element in attracting younger members and active volunteers, and wider audiences in general.

The decision was taken by AGT Council of Management to have a password-protected section of the website in order to encourage more open discussion between members. It was hoped that CGT discussion would be facilitated by the knowledge that members are writing for a specific audience, and could therefore ask questions about strategic, operational and regional issues without having to share this with the global internet community. The training materials could also be lodged there: these were funded and written to specifically target CGTs, support their development and the way they work and not intended for use by the general public. It was also hoped that the Web Forum would help highlight emerging issues that could be taken up by the project.

The Web Forum membership has developed more slowly than hoped. Some CGT members have given feedback that it isn't easily found – now that it has attracted members from across the country, plans are in place to move the entry portal to the

AGT Home page. Anecdotal feedback indicates that many CGT members are not of the demographic used to interacting on such forums so won't necessarily visit regularly or indeed post, and many who haven't registered are also concerned with privacy issues. There is, however, huge potential to develop this resource. Some members have expressed frustration that the Web Forum isn't used more regularly and effectively by other CGTs members, and also suggested that it isn't very user-friendly. This latter point has been considered, alongside similar forums. The way that sub-forum headings are laid out could be improved for clarity but, with availability of personal settings and the 'search' facility for users, the programme is very similar to others in use in the sector eg that of GreenSpace Southeast.

The most popular topic views, coupled with e-mail feedback, indicates that the direct access to training materials and handouts is popular but that also members are seeking ideas on how to go about using these to promote working with other conservation partners. For example, the training in Researching a Site for Local Listing provides theory and a practical approach to getting started, but CGTs would also like to have practical experience from other CGTs as to how this has been applied.

Statistics on numbers of visits are not available. However, the Web Forum fulfils quite a particular role for CGTs – it is a site that is probably only visited when members need to know about an issue, either knowing that materials are there that they can download, or they will post a query directly. It is less likely that members will casually browse the site very often which means that queries raised by others are likely to be answered slowly, unless the HLPO responds or prompts the members who could respond. Members are more likely to think about sharing information within their own CGT – this is not helpful for other trusts as they don't necessarily visit other CGT's websites and infrequently see other newsletters.

The Web Forum can function well as an area of pooled resources for occasional use, but the continued development of a culture of information sharing through pro-active encouragement by AGT and other stakeholders could maximise the potential of learning from the practice of others.



Studying CGT promotional materials at Regional Forum, Basingstoke - November 2012

3.7.4 Training Events

The topics were chosen in line with the original brief developed by stakeholders (**Appendix 14**), and discussion between EH and the HLPO in November 2010. They were modified through the emergence of key issues from Year 1 discussions with CGTs and the identified need for projects and initiatives which could provide focus for CGT projects, particularly drawing on the experience of the Kent Compendium Review Project. The courses were provided free to CGT members, and devised and delivered as follows:

- *Researching a Site for Local Listing*

CGTs reported a lack of focus for research, and research carried out usually had little connection with its potential application for conservation. Kent GT successfully delivers a project using a specific EH methodology and it is this approach that this course advocates. This course was commissioned from VH, based on her experience with Kent GT, and delivered with assistance from the HLPO. The content also took into account the emerging guidance from EH on Local Listing in order to directly link the practical planning and conservation applications. It was delivered 4 times as part of the HLP, and then also locally commissioned by Sussex GT.

- *Understanding Conservation Management Plans*

The content was created to ensure that delegates would be able to contribute to consultations on parkland plans as requested by NE and so support better outcomes for parkland entering HLS; it also links with the EH Heritage At Risk agenda, and planning applications. This course was jointly devised and delivered by VH and the HLPO, drawing on their experience of delivering the Local Listing training. The course was delivered once only and the materials therefore not fully tested and refined.

- *Understanding more about Historic Parkland*

Anecdotally, local research and visits have focused on gardens resulting in less historical information and survey details being available on parkland sites. This course was commissioned from LUC, Matthew Tickner, who had led on the parkland plan for a site that the HLPO had identified as demonstrating a range of parkland features, not all of which would be immediately obvious, and had entered HLS. NE HELAs were invited to deliver a key session on the ecological importance of parkland and benefits of HLS for the historic and natural environments. The course was delivered twice.

- *Responding to Planning Applications affecting historic designed landscapes*

CGTs reported low numbers of members participating in this area of their work and, for some, a lack of skills and co-ordination of response. Having considered various options for commissioning this course, the HLPO devised and delivered this course directly, deciding that the perspective of a 'non-planning professional' might be less intimidating for delegates and also to ensure that the content could be fully tailored to the needs of CGTs. The materials and approach were checked and endorsed by the GHS. It was delivered jointly with the GHS Senior Conservation and Policy Officer. The course was delivered 3 times in the southeast region, once in London open to national CGTs, and twice subsequently, in the north and southwest.

Aims, objectives and content of each course are included at **Appendix 15** along with analysis of delegates, venues used, a sample flyer and feedback form. All courses, except *Planning*, were delivered at venues with access to historic designed landscape for integrated site survey and visits.

Each course was advertised on the AGT website, by e-mail to main CGT contacts, and an A4 colour flyer produced (**Appendix 15c**). This included information on why the course would be useful to CGT volunteers. The courses were advertised a minimum of 3 months, and up to 6 months, previous to the event.

The resources for responding to planning applications tend to be increasingly web-based. After trial and error with unwieldy quantities of printed materials for the *Planning* training course, the HLPO took the decision to print a minimum of handouts and then give further resource material to each candidate on a CD. This has not yet attracted negative feedback. The course was also supplemented by hard copies of booklets on planning issues published by the Campaign to Protect Rural England (CPRE) which formed the basis of the course.



Interpreting old maps - Padworth House, Berkshire - September 2012

3.7.5 Training Feedback

Forms were completed by nearly all delegates at the end of each training day. These were collated and reviewed at project monitoring meetings. All delegates agreed with the statement that the training would support their involvement in their CGT. Generally venues and catering were viewed positively. Overwhelmingly course content and handouts were reported as 'very relevant'. Delegates described actions that they hoped to take as a result of the training so were motivated to take at least 1 action at the point of completing the training.

Main satisfaction areas reported were:

- Experience/enthusiasm of trainers' delivery
- Meeting other CGT members and sharing experience
- Increase in confidence in planning issues
- In depth approach and content

Main areas reported as less satisfactory were:

- Too much covered
- Wish for more handouts to be sent out beforehand
- Site visits hurried.

Take-up of training was generally lower than expected. Up to 16 places were available on each course (limited in order to ensure that they could be interactive); largest attendance was 13 volunteers; the lowest, 5 volunteers (CMP training session 2, set for March 2012 but postponed due to staff absence, attracted just 4). Planning training set for October 2011 in Waterloo, London, attracted just 3 bookings and was therefore postponed.

The HLPO asked for feedback from CGTs in March 2012 as to why numbers might be low. 2 of the 8 replied. Main issues identified were as follows:

1. Lead-in on promoting training
2. Distance to travel
3. Lack of understanding about what the training is about and why it is useful
4. Lack of members wishing to be engaged in conservation work
5. Experienced volunteers responding to planning consultations don't see the need for training.

It became apparent that the promotional information on courses had not reached a wider membership, often not beyond committee and sub-group members; CGTs did not always have strong distribution structures eg group e-mail. The majority rely on newsletters in hard copy 2 or 3 times per year, with occasional interim mailings.

3.7.6 Other Training Opportunities

The Regional Forums proved to be a particularly useful channel for raising awareness about conservation initiatives. The 3 meetings covered a range of related topics including: EH Landscape At Risk programme; recruiting volunteers; introduction to HLS and further in-depth information on contributing information to NE; information sharing on landscape history lecture programmes; marketing and social media. As with many of the workshops, attendance was by the 'core' CGT members – anecdotal evidence (through e-mail and phone calls with the HLPO) would suggest that issues were then explored at a local level through discussion at committee level.

The HLPO devised a short, stand-alone presentation, with a handout, on Country Parks which CGTs can download from the website and deliver locally. Whilst not delivered personally by the HLPO, to date it has been downloaded 10 times from the CGT Web Forum. Similarly, the presentation on Significance, adapted from the CMP training course, was placed on the Web Forum; it has been downloaded 5 times to date.

3.7.6.1 Discussion: Training Aspects

Identifying suitable locations for the training was time-consuming, largely because the sessions required the inclusion of a site visit (excepting Planning). The chosen location had therefore to meet a number of criteria both in terms of facilities and demonstration of features. CGTs were able to help with this to an extent, and 2 further sites were identified particularly on the basis of their vulnerability which indicated that volunteers could glean useful experience of considering conservation issues for these sites.

Access to historic designed landscapes for the training was not in the original project brief, which had assumed that training would be delivered in stakeholders' offices at nil cost, but it was clear early in the project that such venues would not illustrate concepts effectively, and CGTs also expressed their reluctance to travel to London for regional training. Additionally, the training programme brief was for 3 courses per year only; this would have entailed delivering most courses once only. In moving away from a 'central' venue, travel distances became a key consideration for attracting delegates. Each course was therefore planned for delivery twice: in locations to the west and east of the region. This had budget implications which required careful management.

Delivery of 2 sessions of each training course helped in encouraging attendance; local CGTs have been consistently represented at each course. Therefore, the decision to run the courses twice, in the east and west, appears to have had positive results. London courses have not proved popular, although whether this is particularly due to high travel costs, long journey times or lack of interest in the subject (Planning) isn't known.

Although the issue of disseminating and promoting training courses could benefit from guidance to help CGTs re-organise in the light of increasing reliance on digital media, the lead-in time for courses could have been longer in order to help negate this issue.

*Whilst the promotion materials emphasised what delegates could get out of attending, this needed to be specifically backed up by CGTs encouraging their members that if they do attend, their CGT will find their new skills very useful and can help them to apply them in working for the trust. Newsletter articles to this effect were contributed by the HLPO (as shown in **Appendix 11**). It is felt that this is still an area that could be taken further ie ensuring that those who attended training received specific follow-up contact from their trust.*

The training delivered had a strong academic emphasis. The programmes were devised to be rigorous in their reflection of current good practice, but accessible in terms of use of jargon, pace and relatively informal delivery. However, they were perhaps very different from other training offered to CGT volunteers, eg AGT Study Days which usually involve a lecture and guided walk around a site. They are less focussed on practical outcomes achieved by the day, and more on expansion of knowledge of a particular site and the social and networking opportunities. The HLP training was more didactic, an approach which would not necessarily suit all members.

The training has been designed to be 'stand-alone' and the materials written accordingly. CGTs will need confident and competent people to deliver these training courses. The training programme has, to date, been run by experienced trainers with track records and professional experience in the field. Training is also time-consuming to prepare and deliver. However, the availability of materials for use should enable CGTs to commission further local training, or indeed the materials could be used on a modular basis and the topics broken down over a number of sessions. Detailed guidance notes have been included in the materials in order that trainers are guided in how to set up the training and which areas need to be customised according to location.

The training underlines practical applications of knowledge and skills, and it may take some time for a CGT committee or group to determine their local approach and set up structures to apply these. This is likely to lead to a time lag between training the initial volunteers and the requirement for training by new members recruited as a result of renewed initiatives by the CGT. However, having developed the training, and this being available for future download and use, it is to be hoped that CGTs will use the training when they are ready. In running the training locally, they are likely to want to adapt the materials to reflect local practice. Whilst many of the documents are provided as 'read only' documents, they can be saved separately and modified. Some handouts will need updating before use, especially where web sites are quoted, and this is highlighted in the guidance. It will rely on the attention to detail of those using the materials in the future.

CGTs may well commission trainers to provide local training, but also might well have skilled and experienced professional members who could deliver this. There was huge benefit to this project in using a trainer who had long experience of the gardens trust movement and working with volunteers. The fact that the HLPO was able to devise and deliver the Planning training personally made this course not only extremely cost effective but also enabled AGT to offer this training extensively. This was an unexpected outcome of the project.

Feedback from the Research for Local Listing course suggests that CGTs would like opportunities to practice the EH approach to site descriptions and editing of reports – an 'advanced' course. It is likely that this would need to be commissioned locally and could perhaps be delivered by previous EH Register inspectors or even experienced volunteers.

Basic induction and introduction to research remains an on-going issue for CGTs, some of whom report that they make a considerable investment of time in this but that volunteers do not always remain. This could be an issue of timing focussed work for volunteers so that they are fully engaged from the outset of their membership. The HLPO has requested that CGTs share their practice on this via the Web Forum but this will take time to emerge and the CGTs will need further prompting to do this.

There is a value in delivering regional training, rather than purely local. Were there to be an ongoing annual programme of such courses, the CGTs could advertise and promote them to their members and have interested volunteers attend to get a broad perspective and increase their knowledge on subjects that they could then apply locally. This could give CGTs an ongoing pool of active volunteers and the attraction of training could pull in new members.

3.7.6.2 Achieving Value for Money in Training

The venues used were all reasonably priced, usually owing to the fact that they were voluntary sector or institutions. The one exception was the use of a hotel set in parkland, although this was still not an unreasonable cost per head. 2 venues were available free of charge, being AGT offices and a school. The cost per head depended, of course, on the number of delegates attending, but with careful choice of venue, the potential impact of this was mitigated eg even with just 8 delegates at the Dorking venue, the costs were

approximately £80 per head including lunch. This still compares well with the fees per person for commercially available training courses eg Rewley House, Oxfordshire – one day at £120.

Costs for printing of materials was over and above this and varied considerably from course to course. One problem encountered was the full colour and glossy nature of the EH guidance booklets. Few EH publications are now produced in hard copy but as pdfs available for download. The EH 'Local Listing' guidance is 35 pages in full colour blocks with photographs, making them prohibitively costly to print. The HLPO and trainers felt that volunteers were more likely to read a hard copy than read it on screen. The HLPO therefore contacted EH to raise this issue and received a version with the colour blocks removed; a far more practical proposition for printing and it is hoped that EH might now produce such versions as standard practice.



Giving feedback – London – December 2012

3.7.7 Partnership and External Links

The project enabled the HLPO to draw in other agencies where their support seemed appropriate. Having discussed CGTs setting up clearly focused projects, the issue of funding came to the fore. The HLPO was able to draw on experience of working on Heritage Lottery funded projects and promote the possibilities that this might offer. In particular she offered advice to Oxfordshire GT in the early stages of their project development – they were subsequently successful in securing £50,000 to deliver their *Oxfordshire Walled Gardens Project* and invited to share this experience with other trusts through the Regional Forum. Having attended HLF strategy events, the Development Manager of HLF southeast was also invited to address the Forum and discuss how CGTs might best approach their applications.

The HLPO was also contacted on a number of occasions by officers in other areas of the partnership organisations, beyond those directly involved, with requests to give presentations or for further information. This extended to local authority officers eg 1 urban borough council contacted the HLPO direct to ask how to go about obtaining support for their local listing project and she was able to broker the links with the relevant CGT, with the result that a small research initiative was set up to develop the list, with an accompanying small grant.

Mindful of the commonly-reported issues of difficulty in recruitment and an ageing volunteer base, the HLPO arranged to informally address students of the University of Bath MSc in *Conservation of Historic Gardens and Cultural Landscapes*. She outlined ways in which active membership of the CGTs could be mutually beneficial and the importance of the voluntary sector in conservation of designed landscapes. As a result, at least 5 students expressed their interest in contacting their local CGT and in considering coursework that might have an immediate practical conservation application eg responding to a local planning application. The HLPO has been invited to return for a formal slot in the next academic year.

3.7.7.1 Discussion: Partnership Support and External Links

The support of EH and NE for the project enabled officers to legitimately give time to the project and contribute presentations, advice, and proactively promote the project within their organisations. This was invaluable. The HLPO was able to include officers in meetings and training, as well as benefit from contacts made and attendance at events which proved very constructive for networking.

There is potential for the AGT to lead on addressing students on related national courses to encourage them to get involved and thereby gain valuable skills and experience through involvement in their local trust. However, there was also much discussion with CGTs in the course of the project on the need to engage with students on local courses, even if their subjects appeared tangential eg media studies students could assist with newsletter production, websites and social media.

3.7.8 Influence in Other Regions

As described, as a direct result of the loss of NE funding, the AGT part-funded the HLPO post in Year 3. The targets for the southeast region were adjusted accordingly. The new arrangements allowed for exploration of the applicability of the project outside of the southeast. There had been an indication of interest from other regions as the HLPO had reported on project progress at the biannual AGT Business Meeting, and the training courses, support with strategy and conservation casework had been discussed as having national relevance. From Year 3 the courses were opened up to national CGTs, where training in the southeast was undersubscribed. Whilst this was not widely taken up by members from outside the southeast, those that did attend added greatly to the variety and interest of discussion and experience on the day, and resulted in a number of ongoing connections and exchanges of information between trusts.

The experience of running the project in the southeast therefore led to expansion to 2 further target regions in Year 3: the north and southwest government regions. The scope of HLPO activity was somewhat limited by time and budget, but initial analysis of activity would suggest that the experience and issues of the CGTs in the southeast is replicated to a greater or lesser degree across the country.

3.7.8.1 Discussion: Influence in Other Regions

Prior to this project, there were no CGTs with links to NE – this was an entirely new area of partnership. There was greater understanding and partnership with EH, largely through the efforts of CMcL in working on the At Risk landscapes. The project provided a focus to understand the overlap of aims and identify practical ways that the CGT knowledge and skills could be applied. Demonstrating in one region that this partnership could be effective began to attract interest from other regions, eg NE invited the HLPO to attend their regional training on parkland in the Midlands at which she was able to network and discuss the project with NE and EH officers covering the Midlands and the East Regions.

Initial experience of working in other regions would suggest that the approach used by the HLPO in working with the CGTs in the southeast would be appropriate on a national basis, given sufficient time to appreciate the issues both regionally and, to a necessary but limited extent, for individual CGTs. This would assist all CGTs as the pool of good practice for exchange would be wider, as indicated by the wider membership of the Web Forum.

3.7.9 General Discussion on Capacity Building Support

It would have been helpful to the early development of the project if time for a literature review had been programmed in. This would have increased the opportunities for building on previous projects and initiatives and assisted the HLPO in making best use of available resources from the outset rather than picking these up during the course of implementation. This type of literature review was an important aspect of devising the Planning training course and enabled the HLPO to make full use of the excellent publications from CPRE and Planning Aid. Being able to signpost such resources and make them relevant to CGTs was invaluable throughout the project.

There were issues that emerged clearly in the early meetings that were common to all CGTs and needed addressing before or alongside initiatives to involve volunteers in HLS. This was fundamental to the development of the project: the HLPO could not impose further commitments on CGTs to work with partners if they had internal structural issues, unless the partnership could be constructive in their resolution (eg offering project opportunities to which CGTs could recruit). The HLPO's role therefore evolved over the course of the project as she needed to explore ways that she could support the CGTs to tackle other issues eg recruitment of active volunteers, making best use of volunteers' skills and enthusiasms, marketing, using digital media. These issues need discussing on an on-going basis – they are fundamental to the health of the CGTs. Providing guidance and highlighting good practice in these sort of areas needs to be an elemental part of the role of the AGT to ensure the health of the CGTs. It is, of course, up to the CGTs whether and how they choose to use this information.



Training to identify and record site features - Juniper Hall, Surrey - July 2012

OUTCOME 5

The provision of specialist advice and increased capacity to deliver agri-environment objectives and targets.

3.8 Approach

This outcome was not directly linked to an output in the project plan so as to be flexible depending on the skillset of the appointed HLPO. It was left to the HLPO to define any outputs in the project design, approved by the stakeholder group, which resulted in a target of 12 consultation responses in Year 1.

The format of the consultation was not defined so there was a wide range of input from the HLPO over the first year which effectively constituted half the projected consultations. The range of consultation and input provided by the HLPO allowed the strengths and weaknesses of the postholder to be assessed and enabled NE to assess the best value approach to the delivery of this outcome over the remaining 2 years of the project

However, in Year 2, following the Comprehensive Spending Review, capacity within NE to deliver some of its core business with regards to the restoration of parkland under HLS was reduced and therefore it was considered that the best value approach in relation to this outcome and the changed circumstances would be for the HLPO to undertake core project work relating to the production of parkland plans. Over the course of Year 2 the HLPO took on 2 parkland plan projects and was heavily involved in the set up of 2 further HLS applications for At Risk sites. This work did continue into year 3 at a vastly reduced level, but primarily where it coincided with the EH At Risk agenda.

Over the course of the project, the HLPO

- provided written advice on the key design elements and potential conservation issues to be taken into account in drawing up HLS agreements for 3 landscapes in Years 1 and 2
- provided varying levels of e-mail advice, as required, on approximately 8 sites being considered for HLS, as to their suitability for parkland plans and conservation approach
- made 6 site visits and gave advice on 7 landscapes potentially entering HLS, 3 of which were sites on the At Risk Register
- following visits to 2 sites with At Risk heritage assets, made considerable pro-active efforts to explore creative ways to draw in funding for further research and conservation, and involve the local CGT, including making landholders aware of the possibility of applying HLS as match funding for HLF
- drafted 2 parkland plan briefs, 1 for an At Risk landscape, highlighting the conservation issues to which the consultants should pay particular attention
- commented on 3 draft parkland plans within the HLS process, including contributing at site meetings for one such site.

In addition, the HLPO led on the commission of a parkland plan for a Grade II landscape in Surrey. This included writing the parkland plan brief and liaising with the land agents to undertake the tender process and engage a consultant. As part of this, attempts were made to engage the land agent in exploring the NE Special Projects funding possibilities for 2 historic structures in deteriorating condition. However, this was not taken up, although NE did specify the requirement that one of these buildings was stabilised as part of the agreed works. Surrey GT had insufficient volunteers available at that point to engage in the parkland plan consultation process.

3.9 Discussion

The expected outputs under this outcome were left deliberately open at the start of the project. Whilst more defined in Year 1 in terms of a numeric target, the actual comments and input from the HLPO was largely on an ad hoc basis. More defined expectations and format for the consultations would have benefited both the HLPO and HELAs at an earlier stage in the project.

However, involvement in parkland visits and plans directly contributed to the HLPO's understanding of the NE procedures involved and hence assisted in working out what CGTs would need to know about HLS, and also what type of information and advice could be helpful to NE officers working on parkland sites. This was drawn on in developing the information exchange protocols between CGTs and NE teams, and also in devising the content of the training courses eg purpose of parkland plans, and importance of parklands for biodiversity.

Through the more project-based work in Year 2, the HLPO was able to develop an understanding of the mechanisms of HLS which helped the HLPO to recognise and advocate cases where HLS could be a potential solution. This both met EH's At Risk agenda whilst the Landscape Architect's post remained vacant, and NE's more targeted HLS approach. In addition, this work meant that there was more direct contact between the HLPO and the HELAs which contributed to the development of the project.



Contemplating remnants of Repton's beech clump Kidbrooke Park, East Sussex - January 2012

OUTCOME 6

The improvement and promotion of partnership working and data exchange with HE bodies, especially the Garden History Society, the UK Parks and Gardens database and the county Historic Environment Records.

3.10 Approach

3.10.1 Historic Environment Record offices/Local Authorities

Having established the scope of the work and partnerships of the regional CGTs, the HLPO contacted the HER offices across the region with a view to meeting to discuss the crossover of work with NE and the level of information on parks and gardens held on the HER. The HLPO visited 9 HERs from August 2010 through to April 2011. Each meeting had a slightly different slant depending on the level of established links with CGTs and interest of HER officers. Largely the meetings were exploratory and enabled the HLPO to gain an overview of HER approach to parks and gardens in the region. Examples of the site dossiers produced by Kent GT volunteers were discussed at the meeting to establish whether HER officers would find the structure and content of such reports valuable if a

similar approach were taken by other trusts. A meeting was also held with EH officers leading on HER liaison and data management in April 2011 as the HER21 Project⁷ projects were then drawing to a close and it was useful to explore whether there might be opportunities to pick up good practice or take forward ideas that had emerged.

Outcomes of this contact with HERs were as follows:

- Commitment from HER officers to support volunteer research initiatives, to varying degrees, in 3 counties, (over and above Kent CC which had an existing strong connection)
- Feedback to NE that a number of HERs would like information on results of HLS agreements on historic landscapes, particularly where there were issues of vulnerability highlighted during the FEP consultation
- The HLPO was subsequently able to discuss potential opportunities for CGTs to develop links and possible projects, aware of levels of support available from the relevant HERs
- EH officers arranged for the HLPO to attend the national HER Forum in July 2011, and she was then subsequently invited to present the project to the December Forum, attended by about 70 HER officers
- Networking following presentation at the national HER Forum led to, in particular, renewed contact with Bucks and Milton Keynes HER officers, later supporting Bucks Gardens Trusts' plans to develop a volunteer research project in the county
- The presentation abstract is now part of the HER HELM resource for future reference
- Contact with the EH Heritage Information Partnerships Supervisor through networking led to the inclusion of the HLPO on the national HER Forum e-mail group – discussion on the Forum usually focuses on buildings and archaeology but has enabled the HLPO to pick up information on other HER projects eg use of social media, and to place an appropriate comment re local listing of landscapes (eliciting further contact from 2 HER officers).

At least 4 local authority officers (Planning, HER, and Conservation Officers) attended at least 1 module of the CGT training as part of their work. This proved very constructive: officers were able to give clear examples and validate the messages that the trainers were giving on the value of the various tools for conservation. This can be said to have assisted at least 2 CGTs in their working relationship on local listing initiatives as the officers have a good practical understanding of the work of CGTs and the training has highlighted ways of working in partnership to mutual advantage.

3.10.2 The Garden History Society

Specific partnership working with the GHS took time to develop. The start of the project coincided with a move to explore the possibilities of developing a closer working partnership between the GHS and AGT at a strategic and operational level. The GHS also undertook a review of its conservation service as a statutory consultee which led to complete reorganisation of this service and loss of regional conservation officer posts. The new focus on policy and major casework gave the impetus to work more closely to support CGTs in responding to planning and conservation issues.

The 2 remaining GHS officers, Senior Conservation Officer and Policy Adviser, Jonathan Lovie and Conservation Casework Manager, Linden Groves, were invited to address CGT representatives in the

⁷ HER 21 is an English Heritage project designed to support the development of HERs to ensure that useful, appropriate and accurate information is readily available to those making planning decisions about the character and components of the historic environment.

southeast at the 2nd Regional Forum meeting in November 2011 to explain the structural changes to the Society's work. This was met very favourably by the attendant CGTs who were able to ask questions and discuss their concerns first hand in a facilitated meeting.

The HLPO was invited to attend a joint meeting of the Conservation Committee. Originally a GHS body, it expanded in 2011 to include CGT members as part of the closer working partnership. In summer 2012, the HLPO then contributed, with other AGT members, to the drafting of Terms of Reference for the new group as it moved to be recognised as a Joint Conservation Committee. The HLPO remained a member of this committee, reporting on the scope of the project and potential for practical committee support for the conservation work of the CGTs.

Jonathan Lovie joined with the HLPO for an introductory meeting with CGTs in the southwest region in June 2012. (This meeting marked the initial contact for developing the project outside of the southeast region). After agreeing that a joint approach could be beneficial, the 2 officers subsequently met to review and develop the training materials for *Responding to Planning Applications affecting historic designed landscapes*. This course was then successfully delivered jointly in October, November, December 2012 and March 2013. One delegate commented "*Lovely to see the support [for CGTs] from EH, GHS and VMcC*". Beyond this, there has been greater exchange on some day-to-day issues such as particular planning applications and input of ideas into other areas of the 2 organisations' work.

3.10.3 Parks & Gardens UK

CGTs had been contributing content to the online Parks and Gardens UK (P&GUK) database since its launch in 2005. The project grew from a partnership between AGT and the University of York. A small group of volunteers from most CGTs were trained in inputting research data on parks and gardens onto the database. Inputting of new data had slowed considerably. The role of the HLPO in the course of this project was therefore to encourage more volunteers to input their research. This message was incorporated into the overall conservation message to CGT member ie that if parks and gardens are recorded and acknowledged, they stand an increased chance of conservation. Additionally, the comprehensive manual on researching parks and gardens produced by the P&GUK project was fully promoted during relevant training courses with CGTs.

The HLPO used the information on P&GUK database throughout the early stages of developing the prioritised lists of parkland sites. It was useful in determining the current use of a site and in indicating site type when considering lists that contained only site names.

3.11 Discussion

3.11.1 Historic Environment Record offices/Local Authorities

The constructive experience of the HLPO in meeting and working with the HER officers underlines the fundamentally important nature of this relationship in the conservation of designed landscapes. The HER is the central point for recording and dissemination of HE information – ensuring that designed landscapes are recorded here establishes them alongside buildings, monuments and underground archaeology.

Developing a coherent message to HERs that CGTs are an invaluable resource for improving the quantity and quality of information on designed landscapes raises the profile of CGT research. The project lent weight to the approaches made to the HERs by the HLPO, encouraged revival of local links, and engendered offers of practical support

for CGTs. This was hugely assisted by the shifts in local authority focus to working on local heritage strategies, involving local amenity groups and working towards including local lists of heritage assets within their Local Plans. Developing such local lists also gives direction and focus to CGTs looking to develop projects and involve members in practical conservation: the link between researching and surveying a site, writing a coherent report, and lodging this with a central public body and the subsequent use of this information in planning and funding decisions can be a compelling argument. There are clear mutual benefits for CGTs and local authorities. Additionally, this coincided with raised awareness amongst CGT members of the use of HER information by NE officers. Particularly important for their needs is information on the survival of the fabric of the designed landscape, so purely historical information is less helpful. More detailed survey information is also helpful to the HER officer undertaking the HER consultation for the FEP as this can be reflected in advice eg on whether a parkland plan would be appropriate.

The HLPO's attendance at the HER National Forum meetings assisted in understanding HER priorities and also highlighted some useful examples of good practice projects eg development of use of social media for developing new audiences. The HLPO was able to highlight these as appropriate when working with CGTs, and it was additionally an excellent networking forum, eg renewed connections and subsequent meeting with Buckinghamshire County Council HER. The HLPO was able to work out the overlap between HER priorities and issues and those of the CGTs to mutual benefit.

The inclusion of local authority officers on training courses has potential to deliver benefits for future partnerships. Whilst CGTs have held joint events previously, these have tended to be for launches and have limited follow up. There is scope for joint training events particularly where this will lead to increased CGT contact with the local authority eg in local listing projects or focusing on parkland for HLS. Additionally, local authority officers tend to have backgrounds in buildings and archaeology; landscape courses of the type provided for CGTs provide an excellent introduction to the subject from the perspective of proactive conservation, rather than on specific garden designers etc.

3.11.2 The Garden History Society

The joint work with the GHS has been crucial in developing greater operational understanding and developing a joint approach to finding ways to support CGTs in planning and conservation work. The joint delivery of training gives a practical demonstration of the determination of the 2 organisations to develop a joint approach. Feedback gleaned from these meetings with CGTs has already helped to influence the direction of the workplan of the JCC to ensure that it acknowledges their needs and priorities in this area. It is still early on in the implementation of the new Terms of Reference for the JCC but taking into account the experience of the HLPO in working with the CGTs should assist with ensuring that the Committee becomes operationally relevant to CGT conservation work. Overall, if clear gains can be demonstrated, this approach should build support for future 'Working Together' and strengthen links between the 2 organisations.

3.11.3 Parks & Gardens UK

The most common feedback gathered by the HLPO on using the P&GUK database was that CGTs found it difficult to input data onto the system. Whilst some CGTs have overcome this, others still struggle. The commencement of the HLP coincided with a funding and staffing hiatus for P&GUK which limited the amount of partnership work possible. However, towards the end of this project, P&GUK developed a new business plan and training for CGTs on data input has resumed. The HLPO has just begun to feed into the overall plan to address the layout of the information on each entry to improve clarity and to draw parallels between the methodology advocated in the CGT training on local listing (ie that of EH) and the division of information for the P&GUK database entries. This should eventually lead to one clear approach to facilitate uploading new sites on to P&GUK. The larger, and more in depth, that this resource becomes, the greater its value, particularly as it can be searched on a national and regional basis rather than being restricted to county only.

The project found useful applications for the P&GUK database but this is hampered to some extent by the inconsistent input of research information by CGTs. Certainly NE officers could usefully refer to it in the early stages of determining HLS applications. Whilst the HLPO promoted the use of the website and urged CGTs to input data onto it, P&GUK were not in a position to take advantage of the opportunities of the HLP at the time. Now that P&GUK have a revised strategic plan, the feedback from the HLPO can be of practical use in developing this further.



Surveying the parkland - Greys Court, Oxfordshire - June 2012

4. Conclusions and Recommendations

4.1 General Conclusions

The partnership of the 3 organisations, EH, NE and AGT, gave considerable weight and purpose to this capacity building project. The overall defined purpose, ie improved conservation of historic parkland, gave an underlying structure and focus to the initial HLPO work with the CGTs. Without this, the 'capacity building' could have been nebulous in nature. The conservation agenda enabled the HLPO to continually make the link between the relatively popular and understood research activities of the Trusts, and the wider audiences and applications for this information. The existence and strength of the partnership opened doors for the HLPO eg in explaining to HER officers that the project was funded and supported by EH and NE underlined that the project had strategic aims beyond the voluntary sector, and this assisted with gaining their co-operation.

Fundamental to the success of the project has been the preparedness of the CGTs to engage in the project, and all 8 have done so. Their commitment has been critical to enabling the HLPO to gain a good understanding of the issues facing CGTs. In harnessing their wish to address these (eg problems with recruitment), the HLPO was able to identify ways in which these could be addressed whilst also taking into account the conservation priorities and resources of the project partners (eg increasing information on the HER). The key successes of the project have emerged where the links could be made between the 2 and interests and resources joined. All 8 regional CGTs participated in the project to a considerable extent, whether in offering examples of good practice, site lists, participating in the training, incorporating NE and EH links into their work, and contributing to planning consultations. The HLPO was able to provide support through consistently demonstrating how CGTs could make a practical difference to designed landscape conservation and clearly flag up opportunities and contacts in the wider sector.

The emphasis of project activity changed considerably throughout, most notably due to the changing funding climate, affecting both the HLPO time available and the HLS programme. This continuous change was tightly managed through the quarterly steering group meetings which gave the opportunity for stakeholders to discuss how to achieve the best possible outcome in the circumstance and revise targets accordingly. This project flexibility allowed for advantage to be taken of new opportunities and emerging synchronicity with other programmes eg local listing, HER21, availability of NE GIS.

The changes to practice within the CGTs, and therefore their ability to respond to new partnership opportunities, is reliant on key 'movers and shakers' within the trusts to persuasively drive forward new agendas. External support and consistency of message can assist in this - key members are not then a lone voice.

The project benefited hugely from the legacy of the Kent Compendium Review Project. This provided a clear demonstration that new volunteers could be attracted to join and train in new activities if provided with a clear project purpose, a role within it, and a specific outcome that had demonstrable use. This was a compelling argument for trusts that had low levels of activity. The connection is clear between having a specific and focused activity for volunteers and the ability of a trust to recruit active members. However, this relies on sufficiently energetic and enthusiastic CGT members to take the lead to develop and drive such a project through – once set up, they can be relatively self-

sustaining ie requiring only a level of management that is within the capacity of a day to day CGT activity that is well-supported and valued by its members.

There is considerable potential for CGTs to increasingly support the statutory sector in conservation initiatives, whether through research or practical intervention, but a step-change in capacity and sustainability will take time and investment of resources, particularly as each CGT is at a different stage in its organisational development; this project has begun the process, but the response and continued partnership of the statutory sector is crucial to this being sustained.

4.2 Common Issues for CGTs

The following issues were identified as common to most, although not all, CGTs in the southeast region and indicate the priorities for support provision:

- Difficulty in recruiting members prepared to be *active* volunteers
- Need for guidance and support on PR and marketing
- Relatively low level of use of digital communication and social media with members and external audiences
- An ageing membership demographic, many of whom had committed many years to supporting their CGT and wished to hand on their responsibilities; some entrenched members who did not wish to hand on responsibility but did not wish to support new approaches
- Geographic spread of counties, making county-wide meetings and training logistically difficult
- Lack of statutory status as planning consultees – planning authorities perceived as paying too little attention to working with CGTs in most areas
- Large numbers of planning authorities and therefore large numbers of weekly planning application lists to monitor for those affecting parks and gardens; insufficient numbers of active volunteers to consider applications
- Lack of focus for research projects
- Lack of capacity to organise formal training events at a local level.

4.3 Lessons learnt

4.3.1 What worked well:

i. Partnership

- The partnership of key stakeholders in the region's landscape conservation allowed links to be made between agendas and applied resources to problem resolution
- Consistency of stakeholder representation – this made the project more robust – officers had invested in the project and were therefore committed to finding ways to make sure it could continue and remain constructive in the face of major external changes
- Members of the project steering group suggested relevant contacts and other projects to follow up at key points in the project
- Regular reporting structure and target review ensured that the HLPO was accountable but that the project remained flexible and could be opportunistic
- The project was very well placed to be able to respond to the changes in delivery of the planning caseload with changes in the structure of the GHS
- All 8 CGTs in the region welcomed the potential benefits of the partnership and therefore worked positively with the HLPO, benefiting to a greater or lesser extent depending on individual CGT priorities and resources.

ii. HLPO in post

- Having one key officer (the HLPO) working with CGTs gave a central point of communication internally and externally and allowed for good working relationships to be built

- Offering each CGT a number of specifically allocated days of HLPO time for their use in Year 3 helped focus on what could be most useful for them in the short and medium term
- In having an overview of CGT activity in the region, the HLPO was able to pick up on trends and themes in issues that the CGTs were facing and either devise ways to start to address these or feed back to relevant officers and committees
- Having a paid officer to co-ordinate regional work ensured that there was consistency of approach, message and follow up action, including tie-in with overall AGT strategy where possible
- The HLPO was able to harness the resources and information of other organisations and channel these usefully for the CGTs, signposting existing resources and avoiding duplication where possible.

iii. Training

- Picking up on the experience of the Kent Compendium Review Project and working closely with the lead trainer from that initiative meant that work was not duplicated; rather successes built upon
- Regional Forum meetings with a varied agenda ensured that all CGTs heard the same messages and were able to ask questions and discuss issues in a manageable group size, as well as share their own good practice
- Training course content was geared around clear practical application, with suggested ways that delegates could apply what they had learnt to support the work of their CGT
- The most successful training was held in venues that did not have pristine landscape settings – delegates could therefore gain practical experience of researching and surveying the most vulnerable landscapes, which was also more likely to reflect local reality
- Trainers used had a good understanding of the work of CGTs and the level of information needed in order to ensure it was both accessible and applicable
- It was realistic not to timetable the training courses until Year 2 as this allowed time for establishing relationships and devising appropriate approaches
- The Web Forum offers the facility to make course materials readily available for download and allows for further sharing of resources and ideas amongst CGTs and other partners.

iv. HLS / At Risk Programme

- The HLPO was able to raise the profile of the CGTs with many different audiences and represent the CGTs as a group, rather than from a single CGT perspective, and could draw on actual case studies and experience from across the region
- Working on practical conservation through HLS and At Risk initiatives provided the HLPO with recent case studies and demonstration of how CGT information could be applied
- Some owners of sites At Risk responded well to the approach of the HLPO and CGTs and recognised the supportive and non-confrontational nature of the contact.

4.3.2 What didn't work well:

i. Funding

- The loss of the EH Landscape Architect in the southeast region severely limited the progress that could be made on At Risk landscapes and dented the credibility of practical support of EH for the project from the point of view of CGTs
- The shift in targets for HLS and ultimately for the HLPO post after Year 2 caused a hiatus in the development of the lists of sites for HLS and partially removed the impetus for relationship building with local NE teams.

ii. Scope of Project

- Considerable time was spent manually collecting data on parkland that, once the scope of the exercise could be clearly defined, could be collected digitally – more time allowed at the outset of the project to grasp the scope of what was needed could have bypassed this

iii. Training/Other Events

- Even a year into the project, the CGTs were not necessarily geared up to support newly trained delegates to get involved in research or conservation activities straight after the training leading to the loss of newly acquired skills and enthusiasm
- The order of delivery of training courses would have been more logical if considered in a series eg researching a site, what to look for and how HLS can help, understanding a site and its significance through a CMP, and using this information to protect a site through the planning system – this might have drawn more delegates through
- Not all CGTs were necessarily geared up to keep members informed, or prompted, between newsletters so communication was slow.

4.4 NE Dataset Recommendations

The following recommendations are drawn out which specifically relate to the ongoing management and application of the parks and gardens dataset created as part of this project.

- Each site on the prioritised shortlist of 35 sites for consideration for HLS should be reviewed in turn using subjective knowledge and comments from whichever appropriate source eg CGTs, HERs. Many sites need further information or research before suitability for HLS can be fully judged – these can be highlighted. Some sites are known to be already extremely well managed or simply ill suited to HLS and therefore would not necessarily represent a useful investment.
- The prioritised dataset could be used to define high priority landscapes within the region but needed further refinement of data to distinguish priority sites lower down the table. The inclusion of listed buildings, conservation areas, and HLC datasets may help to refine the lower priority sites further and NE could usefully pursue inclusion of these layers. Specific data on ratified locally listed landscapes from local authorities would also assist this data refinement, although this is currently a piecemeal dataset which could really only be usefully applied where county-wide adoption of such lists has taken place.
- NE should continue to seek to add regional datasets to their GIS system to make best use of the project's datasets outcome.
- The dataset is owned by NE and should be maintained by NE on an annual basis through collection of revised and newly pinpointed parks and gardens via contact with CGTs.
- The dataset should be shared as appropriate with external agencies such as protected landscape bodies, HER officers and similar.

4.5 Project Legacy**i. Highlighting priority parkland sites**

The GIS information is available to NE teams to assist with prioritisation of sites for HLS funding, and there is the potential for wide sharing of the GIS layer and spreadsheet lists, including with EH, HERs and protected landscape bodies. There is a mechanism in place for NE teams to contact CGTs

and vice versa regarding input into HLS applications, and the links with NE allow for new sites to be added to spreadsheet by CGTs.

ii. Web Forum

Now established, the Web Forum can be relatively easily maintained, either by a volunteer or with low level moderation by AGT staff. This central repository allows for easy exchange of good practice, ideas and queries by CGTs nationally, and download of training course materials and other such resources.

iii. Regional Forum

The principle that CGTs can constructively come together on a regional basis for an annual Regional Forum has been established. Such meetings bring together not only CGTs to discuss common issues and problems, but also offer stakeholders an opportunity to address and update groups of representatives. It can be organised and hosted by each CGT in turn as an annual event – NE and EH have committed to attending future forums to give updates and help maintain links.

iv. Training Courses

All presentations and handouts from the training courses are available through the Web Forum. Some could be delivered locally by knowledgeable CGT volunteers using these bespoke materials; others could be delivered by commissioned professionals. NE has committed to deliver a session on HLS for parkland training or similar. Short presentations on relevant topics are available on the Web Forum for delivery locally, with handouts – these could be added to by CGTs.

v. Partnership with The Garden History Society (GHS)

A closer working relationship with the GHS has been established at an operational level, through delivery of planning training and advice, and the understanding of issues gleaned through the HLP being embedded in devising the work plan for the new AGT/GHS Joint Conservation Committee.

vi. Contribution to Wider Conservation Agenda

CGTs are fully aware of EH's Heritage at Risk agenda, Local Listing, and the importance of links with Historic Environment Records (HERs) and Local Planning Authorities, along with ideas for how to formulate projects to address these.

More CGT researchers now appreciate the importance of providing research material in a consistent, concise format and its huge relevance for conservation through the planning system, local listing, HER etc. There are concrete links with HERs in at least 3 counties, leading to ongoing CGT projects.

The project has raised the profile and importance of historic parkland in general, and the importance of ensuring CGT research takes it into account, hence contributing to its conservation.

vii. Addressing CGT Structural Issues

The project has emphasised and re-established the importance of devising projects as a way of recruiting and retaining volunteers, along with highlighting the possibilities of HLF funding. Informal links have been strengthened between Trusts within the Region, and some beyond. The profile of CGTs has been raised with historic environment bodies such as the HERs, and southeast protected landscape bodies (AONBs, NPs), and some CGT committees have a wider understanding of the conservation context within which CGTs are working. At least 5 CGTs have redesigned their

5. Recommendations for Further Development

The following are areas of particular potential for future development of this project identified as building on the experience of the 3-year pilot, should resources become available.

i. **Issue:** Continued need for capacity building within CGT movement

Approach:

- Broaden base of CGT contact directly into East and Midlands, and revisit the North and South-west, through regional meetings and one-to-one support in order to fully implement the project at a national level and aim for more comprehensive exchange of practice
- Consider further pilot of whether offering dedicated days of support to individual CGTs delivers better outcomes
- Maintain link between topics for training and forums and the individual needs of CGTs through continued development of constructive relationships with key contacts
- Further develop web-based resources and Web Forum
- Encourage organisation of joint training initiatives and the development of lists of appropriate trainers
- Report to AGT Council on issues affecting CGTs, and areas of good practice, and contribute to using this information effectively.

ii. **Issue:** Difficulty in recruiting active volunteers

Approach:

- Develop a workshop day purely geared to looking at this issue – drawing out good practice, considering external advice, developing a recruitment plan
- Devise support pack of guidance on recruitment and induction, drawing on experience of more successful CGTs, including how to develop a project, recruit volunteers, and how this can actively contribute to conservation of designed landscapes
- Promote use of social media by AGT and CGTs with basic guidance notes and examples
- Widen programme of talks by AGT at national academic courses on a range of related topics and encourage CGTs to do so locally – provide guidance on this.

iii. **Issue:** Strengthening partnership with NE

Approach:

- Ensure newsletters etc are exchanged as a matter of course
- Invite NE speakers to regional meetings and other events as appropriate, including local training
- Explore support for repeat of CMP training, and potential to include NE staff in this
- Encourage CGT members to attend local NE team meeting
- Monitor exchange of information on HLS sites between NE and CGTs
- Keep CGTs up to date with changes to HLS programme under imminent EU funding reforms

iv. **Issue:** Strengthening partnership with EH

Approach:

- Establish good working relationship with new Landscape Architect for Heritage At Risk
- Develop further links with Local Engagement Adviser
- Identify projects suitable for involvement of CGTs eg on Heritage At Risk sites, proposing new sites for the Register
- Identify ways in which EH guidance can support CGTs eg on Neighbourhood Planning.

v. **Issue:** Strengthening links with other organisations

Approach:

- Continuation of joint training programme with GHS, particularly on planning related issues and developing support and resources for CGTs
- Input into devising and implementing the JCC workplan, particularly informed by the needs of CGTs
- Work with P&GUK to ensure that templates for research reports are compatible and therefore facilitate easy transfer of data to the database
- Encourage continued and regular links with HERs and planning officers, both directly and through local and regional fora, presentations and joint training initiatives
- Seek opportunities to promote the work of AGT and the GHS at external fora on a national basis to develop their profile, promote their joint working approach, and showcase the potential benefits of working with these voluntary organisations on conservation projects.



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