

This Handbook is provided as an aid for County Gardens Trusts (CGTs) and was compiled based on FAQs received and other information which may be of use to CGTs.

We would like to thank those CGTs who have kindly provided examples of their forms and other documentation which are referenced in related links and are available on the Gardens Trust website.

We hope that this Handbook, which will evolve over time, in conjunction with the wealth of information on the Gardens Trust website, will become part of your essential tool kit. The Handbook will be reviewed and re-issued periodically. Please feel free to forward to Teresa information which may be of interest to other CGTs to include in future issues, if appropriate.

If CGTs would like to make available to other trusts samples of their various forms and documentation please email them to Teresa at the email below, so that they can be included on the Resource Hub.

We are keen to ensure that other CGTs and GT members hear about your work, events and publications. There is information in the communications section about how to do this.

Handbook compiled by Teresa and Linden, with grateful input from staff and other officers. Any contributions or queries should be emailed to Teresa at the email below, thank you.

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Disclaimer

Please note that the information contained in this Handbook, which is not exhaustive, is intended solely to provide general guidance. The Gardens Trust cannot accept responsibility for its use, and as a separate charitable trust, each CGT is responsible for its own response to regulatory requirements. Although we intend future re-issues of this guidance, the Gardens Trust does not take any responsibility for keeping this guidance updated on a timely basis. Furthermore, the Gardens Trust does not accept responsibility, nor makes any representations, as to the accuracy of any content in third party web sites.

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Viewing as a pdf – *there is no need to press the Ctrl key*, just click on the links and *Home and Page Down keys*.

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ANNUAL RENEWAL OF INSURANCE AND MEMBERSHIP SUBSCRIPTIONS

Public Liability, Employee Liability, Property and Directors & Officers Liability cover (Trustee Indemnity) is available through the Gardens Trust on an annual basis at very competitive rates. Renewal papers for insurance and the annual renewal of membership fees to the Gardens Trust are generally mailed out as one document to CGT Treasurers and Main Contacts by the end of March each year, along with an Insurance Fact Sheet. If you wish to view a copy of the Fact Sheet please contact your Treasurer or Main Contact.

The Charity Commission provides information on the types of insurance charities require. It is a legal requirement to have insurance if your CGT employs staff or operates vehicles on public roads. The Charity Commission recommends that even if your charity doesn't employ paid staff, you may still decide to take out employers' liability insurance to protect the volunteers who are operating on your behalf.

For Public and Employee Liability cover it is a legal requirement that risk assessments are documented for any work/event which potentially presents a risk of injury or ill health to anybody involved. There will be generic risks, but for each event or visit CGTs should be documenting that they are considering the risks, hazards and potential consequences. In the event of an incident/claim, documentation will be called on to support the claim.

Further details at: <https://www.gov.uk/guidance/how-to-insure-your-charity>

COMMUNICATIONS

CGT Contact Lists

The email, home address and phone numbers are held by Teresa for the following CGT contacts; Chair, Conservation, Education, E-newsletter recipient (for receipt of pdfs from other CGTs and GT news), Main Contact, Research & Recording, Treasurer and Voting Rep.

When CGTs contact us please ensure that the name of your trust is always included.

Main Contact

The Main Contact is the first point of contact for all communications with CGTs; this contact may in some instances be the same as i.e. the Chair and Voting Rep, so we apologise in advance if on some occasions you receive multiple copies of the same email.

Sharing information

The GT sends two types of information to CGTs: important information for your committee about business matters, and news and event alerts to be shared with your members.

It is expected that Main Contacts will share information they receive with their committee or trust members for information purposes or action, as appropriate. Even if the news and events information is not of particular interest to the Main Contact we would be grateful if it could still be forwarded to your members to keep CGT members fully updated.

If a group email is specifically sent to another representative within the CGT, e.g. Chairs or Voting Representatives, the Main Contact will also be copied in for information purposes. This is particularly important when a CGT does not have specific contacts for all the roles, or specific contacts may be unavailable due to holiday or illness.

As Teresa will have the most up to date contact details, Teresa is very happy to distribute group emails on your behalf; please do not hesitate to ask. Any such emails should contain the contact details of the email originator for any subsequent enquiries.

By providing us with your contact details the Gardens Trust confirms that they will only be used within the Gardens Trust/CGTs and confirm that we will not pass on those details to other organisations or individuals without your prior permission. If you are sending group emails to CGT contacts they should be sent by blind copy in case someone forwards the communication outside of the GT/CGTs, i.e. if it is related to an event which requires further promotion.

All updates to contact details to be emailed to Teresa at: teresaforey@thegardenstrust.org.

CGT Journals & Newsletters and Gardens Trust publications

CGT Journals/Newsletters

If you would like to provide a copy of your Journal/Newsletter in pdf format for other CGTs, please email a **pdf** to Teresa at: teresaforey@thegardenstrust.org and it will be forwarded on.

The Gardens Trust produces three types of publication as detailed below.

GT E-newsletter

The Gardens Trust e-newsletter provides a monthly update on news and events, including information about conservation, research and campaign activity. It is sent to all GT members and non-members who have requested it.

The e-newsletter is sent in the middle of every month except in December and August. All the items link to a news story or event listing on the GT website, or a CGT website. If you have news or an event you would like us to feature please email a brief description and a link to the appropriate item on your website to the GT e-newsletter editor by the 7th of the month. See below for details of how to list your events on the GT website.

Send information to the volunteer GT E-Newsletter editor: Hannah_richards89@live.co.uk with a copy to susannahcharlton@thegardenstrust.org.

Historic Landscape Project also send updates to those who have subscribed to their contact list. [See HLP Mailing List](#) for further information.

Garden History (Journal)

“Garden History is one of the foremost journals in its field worldwide and remains the journal in which to be published for those dedicated to garden history scholarship. It has a wide academic and professional readership, and from the earliest issue to the present is an enormously important and relevant source of information, providing vital support to the Trust’s promotion of the study of garden history, landscape gardening and horticulture. Its reviews section also offers timely and critical reflection upon recent published work in the field.” Dominic Cole, CMLI FIOH VMM OBE, President of the Gardens Trust.

Editor, Dr Barbara Simms.

Distribution twice a year, generally spring and autumn.

Contributions for publication should be submitted electronically as an email attachment to the Editor, Dr Barbara Simms at: journal@gardentales.co.uk. We advise all contributors to consult the Garden History submission guide which can be found at: <http://thegardenstrust.org/research/journal>, prior to submission.

GT news, the newsletter of the Gardens Trust

Editor: Charles Boot.

Distribution three times a year, generally in mid-March, mid-July (with Summer Journal and Annual Report) and mid-November (with Winter Journal).

Deadlines are, 1 February, 1 June and 1 October.

The copy deadline for **GT news** is published on the contents page of the previous issue.

GT news contains a mixture of news, details of Gardens Trust (and other people’s) events, members’ research and other views, with less formal articles.

Charles is constantly on the lookout for information on what CGTs are up to, whether as corporate bodies or as individual members of the GT or a CGT. He is also very happy to promote your larger events, those looking for more than a local audience, especially Study Days, Seminars and Conferences, at home or overseas Study Tours etc., as opposed to local garden visits. It is also good to include a notice or article based on local publications which perhaps weren’t reviewed in the journal, so please forward those details as well and Charles will include if it is relevant and there is space: these are best when submitted in terms of an article rather than a review.

If you would like to include a separate flyer or other leaflet in our mailing (at a cost), please contact Louise Cooper on enquiries@thegardenstrust.org, headed: GT news inserts, for information about deadlines and deliveries.

GT news correspondence and items headed GT news should be emailed to the editor Charles Boot at: news@thegardenstrust.org.

Guidelines for submission of articles/photos for GT news are available at:

[http://thegardenstrust.org/wp-content/uploads/2018/07/GT notes for news contributors.pdf](http://thegardenstrust.org/wp-content/uploads/2018/07/GT_notes_for_news_contributors.pdf)

Social Media and Gardens Trust Blog

Social Media

Social Media is a useful way of reaching a much wider audience, and shows that your trust is active in the modern world. It can help you to:

- Attract new members
- Market your events to a new audience
- Gain support for historic gardens and landscapes in your area
- Raise awareness of your CGT and what you do

So why miss out?

Further information at:

<http://thegardenstrust.org/conservation/hlp-hub/cgt-guidance/social-media/>

The Gardens Trust has the following social media accounts:

Facebook

The Gardens Trust

<https://www.facebook.com/groups/950605768331048/>

Twitter

<https://twitter.com/thegardenstrust>

The Gardens Trust Blog

The Blog has been running since 2013 and is written by Dr David Marsh, who is one of our Trustees. It is planned to come out early every Saturday morning, and to inspire, amuse or cajole you into finding out more about the fascinating world of garden history in its broadest sense. Further information and Blog at: <https://thegardenstrust.blog>.

The Gardens Trust Website

The Gardens Trust website contains a wealth of information to help CGTs and support your activities, from 'how-to' resources to training and information about conservation and research. **The Resource Hub** <http://thegardenstrust.org/conservation/hlp-hub/> includes support material for running campaigns and events, training materials, information from networking days and guidance on conservation.

CGT publications, events and news

Do tell us about your publications so that we can promote them alongside other CGT publications <http://thegardenstrust.org/research/cgt-publications>.

CGT events which are of more than local appeal and are open to people who are not members of your CGT can be listed on the GT website at External Events:

<http://thegardenstrust.org/events-archive/?events=external>. To list your event on the GT website, complete the **Submit an Event form** at:

<http://thegardenstrust.org/news/campaigns/submit-event/>. You will find Guidance Notes for Adding Events to the GT Submit an Event Web Page at [Appendix Two](#). The event will then be published on the website as soon as possible.

If you have news, such as a successful conservation story or research discovery, that you would like to share with GT members please email the information with an illustration (as a jpeg) to: susannahcharlton@thegardenstrust.org.

CONSERVATION

The Gardens Trust is the Statutory Consultee in relation to planning applications that affect the designed historic landscape on Historic England's (HE) list of significant sites. In its capacity as Statutory Consultee, the Gardens Trust plays a key conservation role and supports the County Gardens Trusts (CGTs) in the protection and conservation of designed landscapes, both registered with HE and local.

Local planning authorities must consult the Gardens Trust in relation to all planning applications that may affect historic designed landscapes in England and Wales that are on the Register of Parks and Gardens of Special Historic Interest, held by Historic England. These consultations are dealt with by the Gardens Trust's Conservation Team, working closely with volunteers in the CGTs.

The Gardens Trust sends to CGTs on a weekly basis a list of all the conservation consultations logged by the Gardens Trust consisting mainly of planning applications. The CGTs, as members of the Gardens Trust, may respond to applications in consultation with the Gardens Trust. A CGT response may however be independent of a response from the Gardens Trust and can be forwarded to the Gardens Trust for inclusion on the casework log if desired.

Further details at: <http://thegardenstrust.org/conservation>.

The Gardens Trust also welcomes notification of any planning applications affecting Registered Parks and Gardens, and local list sites, not appearing on the weekly lists, but which have been received by CGTs.

The Gardens Trust casework log is a shared resource open to all CGTs. Full training of how to use the casework log is offered to CGTs for reference purposes, and for adding responses and new cases.

Contact: conservation@thegardenstrust.org

COPYRIGHT

Advice has been provided to the Gardens Trust regarding Copyright. This advice is intended to assist individual researchers at the County Gardens Trusts (CGTs) and the Gardens Trust (GT) in the UK in understanding how they can use the materials they obtain, and how to avoid infringing another party's copyright. [A copy of the guidance can be found at Appendix 3.](#)

GARDEN HISTORY GRAPEVINE

Garden History Grapevine is a network of enthusiastic experienced lecturers and researchers in the history of gardens, designed landscape and horticulture. It began in 2015 when they realised that there were fewer and fewer garden history courses being laid on by institutions across the country. They also noticed that, despite this, there was still a big demand for lively and informative 'leisure' courses, and for more specialist professional training about historic parks, gardens and designed landscapes. However there is also a lack of skilled researchers and teachers in the field. You can find more details about the team and courses at:

<https://gardenhistorygrapevine.wordpress.com/2016/05/12/stay-in-touch/>

GOVERNANCE

Governance is a Trustee's role in establishing the long term direction of a trust, which should include setting its objectives or purposes and implementing policies, procedures and activities to achieve those objectives. Governance requires that all legal requirements are adhered to and ensures that Trustees are accountable. A board of trustees is responsible for good governance but staff, volunteers and other stakeholders all play a part in this.

The Gardens Trust is managed by a Board of Directors, who are also Trustees of the Charity for the purposes of the Charity Commission. The Trust's members elect members of the Board at the Annual General Meeting. Board members are elected for a three-year term of office, and are then required to retire at the next AGM, but are eligible for re-election for a further three-year term.

Data Protection

In response to the EU General Data Protection Regulation (GDPR) which came into force on 25 May 2018, the Gardens Trust put in place Data Protection Policies and Procedures. These policies and procedures are available to CGTs for their information; however, given that the facts and circumstances with regard to individual CGTs may differ from those of the Gardens Trust, it is not intended as blanket general guidance to CGTs.

There are essentially two separate legal issues involved. One is the legal basis on which the Gardens Trust holds personal data and communicates with those whose data it holds. The second is required notifications to those persons about what we do with data.

Further information and documents from CGTs can be found at:

<http://thegardenstrust.org/conservation/hlp-hub/cgt-guidance/charity-management/>.

Fraud/Scams

Incidents of fraud and scams are unfortunately on the increase. Examples experienced by some CGTs have involved fraudulent direct debit payments, standing order requests and transfer of funds to a bogus bank account.

These frauds and scams are termed as Whaling (or spear phishing); they target businesses, organisations and charities in an attempt to get confidential information for fraudulent purposes. Further information about how the scam works, the warning signs and how to protect yourself can be found at: <https://www.scamwatch.gov.au/types-of-scams/attempts-to-gain-your-personal-information/phishing/whaling-spear-phishing>.

It is advisable that the systems you have in place allow monitoring of financial activity by more than one person; bank statements should be regularly checked for evidence of unusual activity/transactions. In the interests of transparency and security a minimum of two officers should be authorised signatories for cheque payments and for authorisation of payments and transfers for online banking. Finally, if you are in any doubt at all about the validity of a request that you have received from either an external source or what you believe to be within your own trust, we strongly recommend that you confirm its authenticity. Check the details of the request with the originator, ensure that you are using the correct email, do not just reply as you may be replying to a bogus email, speak on the phone if necessary, and you may also wish to check with another member of your committee. Remember, if in doubt, check it out.

The Charities Commission site is a very good source of information regarding managing charity assets and resources, including internal financial controls. Further information can be found at: <https://www.gov.uk/government/publications/managing-charity-assets-and-resources-cc25>.

Governance

The Gardens Trust statement on Governance is available at: <http://thegardenstrust.org/about-us/governance/>.

The Charity Commission has produced a very informative document on Governance, an extract below is included of some things to consider.

Are we an effective trustee body?

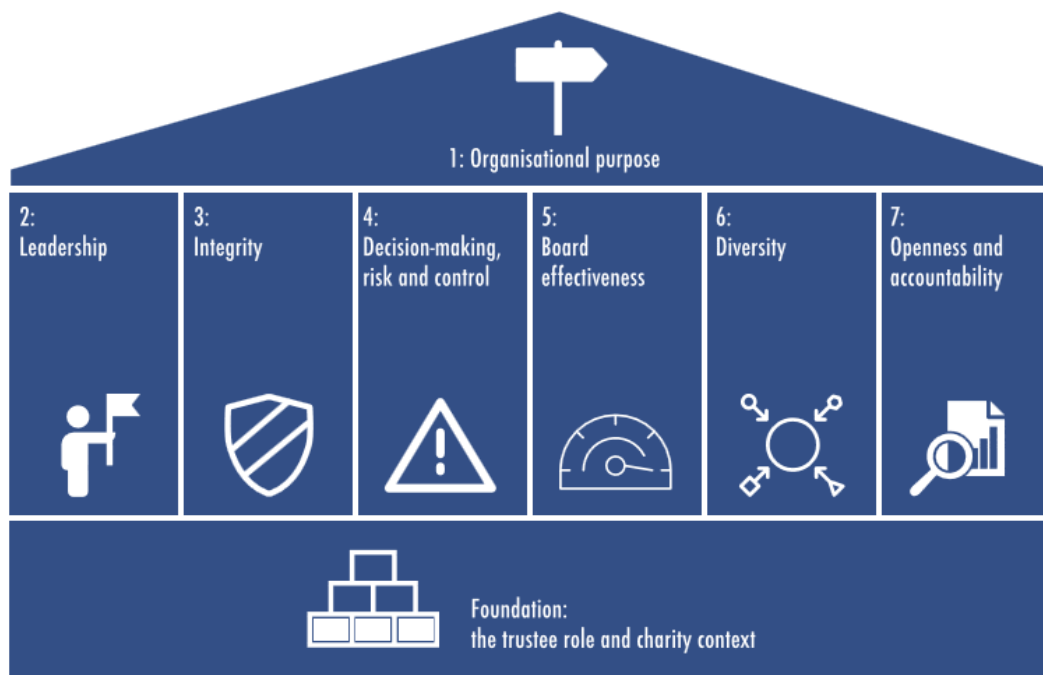
For example, do we understand -

- the charity's aims as set out in its governing document?
- what our charity will do, and what we want it to achieve?
- that all of the charity's activities are intended to further or support its purposes?
- how the charity benefits the public by carrying out its purposes?
- have we read 'The essential trustee (CC3)'?
- have we recently reviewed our performance as a trustee body?
- are we using our time together as a board efficiently and effectively? do we read the accounts, reports and other background material before the meeting?
- have we recently reviewed the skills, knowledge and experience we have as a trustee body?

The full document can be found at:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/601505/Charity_governance_finance_and_resilience_15_questions_trustees_should_ask.pdf.

The Charity Governance Code with its seven principles is a practical tool to help charities and Trustees to develop high standards of governance.



Diagram, courtesy of Charity Governance Code

Further information at: <https://www.charitygovernancecode.org/en/front-page>.

Health & Safety policies

Health and safety law should not be a barrier to volunteering activities. Taking a sensible, proportionate approach is the key to making sure things go smoothly and safely and avoiding unnecessary bureaucracy.

The Health and Safety Executive (HSE) states that: The approach you take should be proportionate to the size of your business and the nature of your business activity. For most small, low-risk businesses the steps you need to take are straightforward. If you have fewer than five employees you don't have to write down your risk assessment or your health and safety policy. However, CGTs do have a 'duty of care' - a common law duty which applies to all individuals and organisations. For those CGTs with Public and/or Employee insurance cover, risk assessments must be carried.

Most policies cover the following:

1. A Statement of general policy on H&S at work, which sets out your commitment to managing H&S effectively and what you want to achieve.
2. Responsibility section – which sets out who is responsible for specific actions.
3. Arrangements – details of what you are going to do in practice to achieve the aims set out in your statement of H&S policy. Include information on how you are going to eliminate or reduce the risks of hazards in your workplace.

The policy should be reviewed each year (preferably by the Board).

Further information can be found at: <http://www.hse.gov.uk/toolbox/managing/writing.htm>.

Risk Assessments

Carrying out a risk assessment is a vital part of health and safety procedure for any organisation. They help to identify and control risk, whilst providing logical and practical precautions which prevent accidents and injury. They enable organisations to spot potential risks, put procedures in place to mitigate risk, monitor those risks and spot new ones as they arise.

It is a condition of cover with our insurers that risk assessments are carried out and documented for all events. There will be generic risks for each event/visit. In the event of an accident/incident, documentation will be called upon to support any claim.

Although there is no set timescale for carrying out a review of risk assessments, it is good practice to review them on a regular basis and this should be marked up on the form accordingly. This also gives the reviewer the opportunity to see the event afresh each year and serves as a reminder of the protocols which should be put in place both prior to and during the duration of the event/visit.

However, if any of the following has occurred since the last assessment, then a review must be carried out:

- changes to the event/visit set-up
- changes to personnel
- new procedures/protocols put in place
- history of a previous accident/incident

Further information on Risks Assessments can be found at:

The Institute of Risk Management

Risk Management for Charities document

<https://www.theirm.org/media/1238690/CharitiesGuidanceV6FINAL.pdf>.

The Charities Commission

<https://www.gov.uk/government/organisations/charity-commission>.

Health and Safety Executive, Event planning/safety

<http://www.hse.gov.uk/event-safety/getting-started.htm>.

An example of a Risk Assessment form for events can be found at: [Appendix One](#)

Risk Management

Charity Commission Guidance

The Charity Commission publishes guidance on managing risk in the document: 'Charities and Risk Management, which can be found at:

<https://www.gov.uk/government/publications/charities-and-risk-management-cc26>.

In the Charity Commission's view: 'Charity trustees should regularly review and assess the risks faced by their charity in all areas of its work and plan for the management of those risks.

By managing risk effectively, trustees can help ensure that:

- significant risks are known and monitored, enabling trustees to make informed decisions and take timely action;
- the charity makes the most of opportunities and develops them with the confidence that any risks will be managed;
- forward and strategic planning are improved; and
- the charity's aims are achieved more successfully.'

Risk Management Statement

Under current charity and company law neither the Gardens Trust nor County Gardens Trusts are legally required to make a risk management statement; however the Charity Commission encourages smaller charities to do so as a matter of good practice and to refer to the management of risk in their annual report. The Commission's guidance states: 'The form and content of the statement should reflect the size and complexity of the charity's activities and structure, and should cover:

- an acknowledgment of the trustees' responsibility;
- an overview of the risk identification process;
- an indication that major risks identified have been reviewed or assessed; and
- confirmation that control systems have been established to manage those risks.'

Further information at:

<https://www.gov.uk/guidance/how-to-manage-risks-in-your-charity>.

Risk Register

A risk register aims to pull together the key aspects of the risk management process. It schedules gross risks and their assessment, the controls in place and the net risks, and can identify responsibilities, monitoring procedures and follow up action required.

Compiling a Risk Register and allocating scores makes Trustees consider the risks facing the charity. The Risk Register should be a live document and should be reviewed at least once a year. An example of a Risk Register can be found at:

<https://www.gov.uk/government/publications/charities-and-risk-management-cc26/charities-and-risk-management-cc26#annex-1-risk-register-template-with-examples-of-use>.

Trustees

Although each CGT is a separate charity with its own Board of Trustees, responsibilities and objectives, the Essential Trustee sets out the key duties of all trustees of charities in England and Wales, and what those trustees need to do to carry out those duties competently.

Further details at:

<https://www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3>.

HISTORIC LANDSCAPE PROJECT

Historic Landscape Project

The Historic Landscape Project (HLP) is the Gardens Trust's capacity building programme, working to support its volunteers and those of the County Gardens Trusts (CGTs) in taking a proactive role in the conservation of historic designed landscapes. The HLP receives partial funding from Historic England.

Further details at: <http://thegardenstrust.org/conservation/historic-landscapes-project/>.

Contacts:

Tamsin McMillan, Historic Landscape Project Officer

tamsinmcmillan@thegardenstrust.org

Linden Groves, Strategic Development Officer

lindengroves@thegardenstrust.org

Margie Hoffnung, Historic Landscape Project Officer

margiehoffnung@thegardenstrust.org

HLP Mailing List

The HLP mailing list allows our Historic Landscape Officers to email CGT members directly, to invite them to training and networking events. Mailing list members also receive a quarterly HLP Events Bulletin, via email, with news of past and upcoming HLP events and initiatives. Emails to mailing list members are relatively infrequent, to avoid a sense of overload, but the HLP finds this an invaluable way of reaching ordinary, not just committee, members and would like to encourage more CGT members to sign up. Please contact tamsinmcmillan@thegardenstrust.org to be added to the list.

HL Assembly/Meet Ups (Chairs and members)

HL Assembly

Each November, the HLP organises a Historic Landscapes Assembly, open to CGT and GT members, as well as professionals and volunteers from across the landscape and heritage sector, giving an opportunity for all those with a stake in historic designed landscapes and their conservation to meet and discuss current issues.

Speakers provide updates on Gardens Trust campaigns, CGT case studies and related news from external organisations, such as Historic England, Natural England and the Woodland Trust. This national networking forum is an ideal platform for the dissemination of up-to-date research and policy, helping national bodies, local authorities and heritage volunteers to share their knowledge and expertise so that they may more effectively protect historic designed landscapes.

The Assembly is held in a different part of the country each year, to encourage as many CGTs as possible to attend, in order to showcase their projects and experience and develop useful networks.

Meet ups

The HLP organises regular Meet Ups for all members of the GT and CGTs. These informal networking events are held across the country, to give all members a chance to meet one another and share news, ideas and skills. Meet Ups provide a good opportunity to inspire and encourage less active CGT members to become more dynamic volunteers for their trust.

In addition, an annual Meet Up for CGT Chairs is held in London, each March. This half-day meeting, also attended by HLP staff and GT Board Members, is a useful platform for Chairs to discuss and work through issues; to interact with the GT Board; and to plan strategically for the future of their CGTs.

Resource Hub

The Gardens Trust's capacity-building Historic Landscape Project has produced and gathered a large range of support materials to help CGTs not only in their conservation work, but also promoting and running their trusts. In addition the Sharing Repton: Historic Landscapes for All project is producing audience development materials.

The Resource Hub is added to on a regular basis and includes information on Campaigns and Celebrations, Guidance, Networking and Training. All of the sections include a broad range of information with the Guidance pages containing an extensive collection with over 20 topics covered.

This information and more can be found at: <http://thegardenstrust.org/conservation/hlp-hub/>.

PROMOTING THE GARDENS TRUST AND CGTS

Promotional materials to promote or introduce the work of CGTs and the GT can be found at: <http://thegardenstrust.org/conservation/hlp-hub/cgt-guidance/promoting-gardens-trusts/>.

SPEAKERS LIST

A Speakers List is available upon request from: teresaforey@thegardenstrust.org.

The confidential details contained in the list should not be passed to organisations or individuals outside of the Gardens Trust/County Gardens Trusts. The inclusion of a speaker on the list does not imply that they are endorsed by the Gardens Trust. The Gardens Trust is not able to verify the accuracy of the details, therefore they are provided as presented to us. Please contact the speaker of your choice for up to date information on their works/talks, fees and availability.

If you would like to add your details to the list please provide the following information: Name | Address | Phone no | Email | Website (if applicable) | Subject area | Fee i.e. hourly rate + travel expenses | any other relevant information.

TRAINING

The HLP offers training on research, conservation and a wide range of other subjects of interest to CGTs. These packages are available online at the Hub and you are welcome to take materials to deliver training yourself. If we can work together to secure funding for costs then we are happy to deliver training on request for your CGT. Upcoming training and networking events are listed on the Events page of the GT's website.

Volunteers

There is a wealth of information on recruiting and retaining volunteers, including Volunteer recruitment adverts, Volunteer job roles for Trustees, Treasurers, Secretaries, Research & Recording roles, Conservation, Education and Event Coordinators, which can be found on the Gardens Trust website at:

<http://thegardenstrust.org/conservation/hlp-hub/cgt-guidance/volunteers-recruiting-retaining/>.

Further information at:

<https://www.gov.uk/guidance/how-to-manage-your-charitys-volunteers>.

<https://knowhownonprofit.org/your-team/volunteers-and-your-organisation/why-involve-volunteers>.

Setting up Volunteer Projects (MOVES)

MOVES is suggested as a useful tool for County Gardens Trusts who want to set up a project which will rely on volunteers. It describes how to get volunteers interested and involved and making sure that the project works to the advantage of your CGT as well as making a great contribution to heritage. Such projects can give a boost to the active membership of your trust and provide really good PR opportunities if planned and executed in a systematic way.

MOVES provides a framework for making sure that your project is designed and ordered in a way that makes it appealing and convincing to volunteers, as well ensures a smooth and successful project.

Mission: Decide project; clarify goals (Heritage outcome; gain for CGT); Make it everyone's mission.

Organise: Budget; Method; Timeframe; Roles; Team structure; Recruiting; Publicity; Legacy.

Volunteers: Revisit old strategies; Lateral thinking; Positive tone; Publicity; Personal approach; Friend of friend; The Too Busy issue; Welcome; Succession.

Energise: Positivity; Remember what might excite; Launch moment; Allow for different styles; Build structure to allow fun; Momentum; Show off; Smile.

Share: Communal; Outward looking; Verbal publicity; 'Formal' publicity; Keep it fun and interesting; Celebrate milestones; Show off at end.

Historic Landscape Project, January 2017

Sample Event Risk Assessment form

CGT name		Risk assessment carried out by	
Event name		Date	
Event date		Reviewed by	
Event location		Date	

HAZARD	Potential Risk					Precautions to take/Advise attendees of					
Inclement weather	Heat	Rain/Snow	Ice	Wind exposure		Take extra drinking water	Wear good suitable footwear	Take walking poles	Waterproofs /suitable clothing		
Traffic hazards	Pavements narrow/none	Busy road	Narrow roads			Keep together	Single file	Keep to one side of road			
Vegetation hazards	Thorns, bushes & hedges	Nettles	Prickles	Bracken spores (late summer)	Thistles	Be observant	Avoid areas of hazard	Long trousers advisable			
Ground conditions	Rough	Stony	Muddy/Slippery	Tripping		Be very observant	Wear appropriate footwear	Use walking poles			
Steepness of surface	Very steep	No handholds				Take extra care	Help each other	Use walking poles			
Fire risk	Very dry	Near hay barns				No smoking					
Access for wheel chairs	Via Steps	Very narrow	Steps on entry or exit	Uneven surfaces		**	**	**	**		
Water hazards	Adjacent to deep water	Fast flowing river				Be very observant	Keep away from edges	Keep to recognised tracks			
Animal hazards	Sheep lambing season	Bulls in field	Cows with calves	Bugs/ticks		Observe warning signs/No dogs or on short lead	Observe warning signs/Give wide berth	Observe warning signs/Avoid area	Wear long trousers and sleeves		
Other issues											
Administration	First aid pack with:					Emergency contact details:					
						Name			Phone number		

Notes: ** Ask attendees to advise when booking of any particular access requirements, what their needs are and how best they can be met within the constraints of the venue and available helpers and complete form accordingly.

If the event is on private land, ask the owner to advise members of risk potential at the start of the event.

Main content courtesy of Yorkshire Gardens Trust.

Guidance Notes for Adding Events to the GT Submit an Event Web Page

<http://thegardenstrust.org/news/campaigns/submit-event/>

Event Title *

Start date * End date *

YYYY MM DD YYYY MM DD

Brief description *

Include a link to an external website or PDF *

Paste URL link here

Include a link to an additional PDF

Paste URL link here

Upload event image

Choose File No file chosen

Accepted file types: jpg, png.
Image size: 400 x 200 px.

Include an email contact address for your event

Your email address (in case The Gardens Trust needs to contact you) *

SUBMIT

- **Brief Description** the description box has a max character count of 350 including spaces. If you have more details than can be included in the Description box, give a link to an external website or an external/additional PDF as below. Please make sure you include details about times and prices.
- **Link to Additional PDF please note** this must be a URL link to a PDF hosted on a website, Facebook etc. It cannot be submitted as an unlinked PDF document.
- **Pictures and images** must be cropped to 200x400 pixels exactly. One of the easiest way to do this is using Microsoft Paint or equivalent programme but the image must be at least 400 x 200 pixels or more to start with, or it will not work. 'Resize' the image using the pixels option to either the horizontal or vertical dimension exactly and then 'crop' to obtain the other exact dimension. The best bit of the image can be retained and any distortion avoided. If it is still not working, send the image to susannahcharlton@thegardenstrust.org and she will post it on your behalf.
- **If you don't have an image** just leave it blank and we will illustrate it with a generic image.
- **If your event is connected to a campaign** (e.g. Sharing Landscapes or Parks), please include this in the entry, so that we can tag it.
- **The public-facing email contact** can be a phone number instead but please insert in the 'brief description' text box.
- **Details can be added to/amended** at a later date but will need to be done manually by emailing susannahcharlton@thegardenstrust.org.
- **If an event becomes over-subscribed or sold-out**, please can you let us know and then we can amend your entry.
- **Finally please note** your event will not appear immediately as it has to be confirmed manually at our end first.



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February 2019

Research - Conserve - Campaign

The Gardens Trust: Copyright

This note is intended to assist individual researchers at the County Gardens Trusts (CGTs) and the Gardens Trust (GT) in the UK in understanding how they can use the materials they obtain, and how to avoid infringing another party's copyright.

This guidance applies to (i) use of images on CGT websites, the GT website and in journals and newsletters of the CGTs and the GT and (ii) the provision of material obtained from archives and libraries to other third party publicly available sources (including local authority Historic Environment Records (HERs) and the Parks & Gardens UK database). If you are using material for your own publishing purposes on personal websites or in other publications, you remain entirely responsible for ensuring that the content you publish does not infringe any third party intellectual property rights.

The Gardens Trust takes no responsibility for any infringement by you of any third party intellectual property rights. This guidance is for information purposes only.

1. Is the work an image or a quotation from a piece of text?

This memo applies to the publication of images. If you are intending to use a quote from a book or other publication, you will need to ensure that the quote is correctly cited and a reference to the source publication included. This memo is not intended to provide advice in respect of quotations, and focusses on the use of images by researchers.

2. Is there copyright in the work I want to use?

Generally, copyright in a work expires after 70 years from the end of the calendar year in which the author of the work dies. If the author of the work is not known, generally, copyright expires after 70 years from the year in which the work was first made available to the public. So the first question to ask is – does copyright still subsist in the document I am reviewing? If not, the archive from which you obtained the document will not be able to enforce copyright in the material.

Copyright cannot be extended beyond the above period, but it can be assigned within that period. For example, an author of an artistic work might assign its copyright in a work to an archive, in exchange for a sum of money. The archive would then be the owner of the copyright and be able to use this right to stop other parties copying and using the work.

In any event, if copyright has expired, the archive may own the legal title to the material as an **asset** (for example, by owning a book in which an image is included), regardless of the nature of intellectual property rights in the material. It may have been passed to the archive under probate, or been purchased from a third party. As the asset containing the material is the property of the owner, the owner is free to impose any contractual terms it wishes on persons intending to use or copy the material, regardless of whether the book contains images with copyright. Accordingly, the ownership of an asset may well have the same practical implications as the ownership of copyright in the asset.

3. When copyright subsists in the work, can I use it for free?

There is a limited defence under UK legislation which means that a person will not infringe a party's copyright if they use the material **for research for a non-commercial purpose** (provided the use is "fair dealing", an elusive concept under copyright law which will depend on the facts, but essentially means the use must not be "unfair" to, or compete with, the exploitation of copyright by the owner). Generally, this defence can only be used where a person is making a **single copy** for their own individual research purposes, with **no copying for wider dissemination**. It is therefore unlikely that you will be able to rely on this exemption to use a photo/archived document in a piece of research you intend to publish (and permission should be sought in accordance with point 5 below).

4. What if I am using content that is freely available (for example, online)?

Free to view images or material, or uncredited images or material that are available to the public (via the web or otherwise) are not necessarily free for you to copy and re-use. UK copyright law does include the ability to use an image to critique or review it, provided the use is "fair dealing". Again, this exception is relatively narrow and will only apply to limited circumstances. The best approach therefore is to always seek consent to reproduce and use material, even if it is freely available, to avoid arguments down the line. Sometimes it may not be possible to obtain consent (for example, if the image is no longer owned by a third party, and therefore no one is enforcing the copyright in the image).

5. What if I want to use material from an archive?

It is always sensible to contact the archive to ascertain the basis on which you can use and copy the material you intend to use. The archive may charge you a licence fee for your use of the material, and request that you include a statement that indicates who owns the copyright in the material (if there is still copyright in the material). Generally, the archive or library will be attuned to whether copyright exists in the work. Even if there is no copyright, the archive/library may require you to seek permission to use an image from an asset that it owns. The archive/library will usually ask you to sign a form to use the material, which often sets out the conditions attached to the permission granted. They may be willing to make it available to you for free (or subject to a small charge), depending on the nature of the publication in which the image is to be included, or if you are taking a copy of the image to provide it to other parts of the authority (e.g. from a county record office to a local authority HER). Some organisations are likely to permit free use (provided sufficient accreditation is included) in what they consider to be academic publications. The GT is of the view that the *Garden History* is an academic publication for these purposes.

Please note that this guidance has been produced on the assumption that all copyright in question is copyright that arises under English law, rather than other jurisdictions (where the legal position may differ).

Links to CGTs and other organisations

Links to all County Gardens Trusts

<http://thegardenstrust.org/about-us/find-local-cgts>



Charity Commission for England and Wales

<https://www.gov.uk/government/organisations/charity-commission>

English Heritage

<https://www.english-heritage.org.uk>

Garden History Grapevine

<https://gardenhistorygrapevine.wordpress.com/2016/05/12/stay-in-touch/>

Heritage Alliance

<http://www.heritageall.org/about-us>

Heritage Fund

<https://www.heritagefund.org.uk>

Historic England

<https://historicengland.org.uk>

Landscape Institute

<https://www.landscapeinstitute.org>

National Trust

<https://www.nationaltrust.org.uk>

Parks and Gardens

<https://www.parksandgardens.org>

Plant Heritage

<https://www.nccpg.com>

RHS

<https://www.rhs.org.uk>

The Arts Society (previously known as NADFAS)

<https://theartsociety.org>

The Garden Museum

<https://gardenmuseum.org.uk>

Walled Kitchen Gardens Network

<http://www.walledgardens.net>