

## Conducting a Site Visit and Recording your Landscape

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Today's session follows on from our previous webinar where we looked at lots of sources for historical research on gardens. However tempting it is; to introduce yourselves to your chosen landscape's owner at the first opportunity and arrange a date, it is going to be a much more fruitful site visit if you have found out as much as you can before you arrive. You will already have a good idea of what you might find, have worked out a plan of action for the day itself and have an impressive folder of information and images so that it looks more professional when you meet the owner or manager.

### **Today's Talk:**

- Why visit your site?
- Getting access
- The recording form
- Before your visit
- What you'll need on the day
- How to record your park or garden
- Volunteer support



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This is a summary of what I am going to be covering today. Why is it necessary to visit and how do you go about gaining access. We'll have a quick look at the recording form and what other pieces of equipment and documents you need to gather together, before your visit. How do we go about conducting a site visit, so you come away with all the information you need and what support there is for you as you conduct your research and visit.

## Why make a site visit?

- To understand the history and development of the landscape - comparing what is seen now to what we know from our desktop research.
- To make a record of what the site looks like today and note its condition.
- To identify the most significant elements of the landscape.



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Although you can gather huge amounts of crucial information about your chosen landscape from archival and desktop research, often it only starts to make complete sense when you visit and walk around your site. Even if you are familiar with the landscape and have visited many times before, you'll see it with new eyes when comparing it to the old maps, images and the other historic materials you've been collecting.

So, what is it we want to achieve from a site visit?

### What you are going to do during your visit

- Checking the features you've noted during your desktop research – are they still there? What condition are they in?
- Picking up extra details which haven't shown up in maps, reports etc. Ask if there are records or images in the house.
- Look for planned views. Are they still there?
- Understanding setting – how the landscape fits into its surroundings.



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These are the main things you should focus on, during your visit.

Your research will have thrown up features such as ponds, moats, bridges, summerhouses, ha-has, lawns, belts of trees, kitchen gardens, terraces, and many other garden features. During your research you will have made a note of any of these on your recording forms, and your visit will enable you to assess whether they are still there or not.

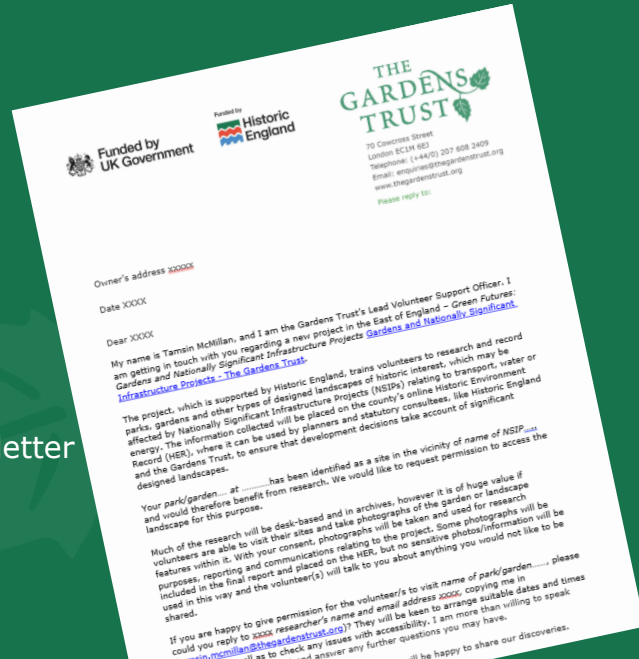
Your visit may throw up features which have not been documented or included on maps. The map surveyors might have missed features, not considered them important enough to be included, or features could post-date the documents and maps you have been studying. More recent features can be acknowledged and given an approximate date of construction. If you are lucky enough to meet the owners/residents, do ask if they have anything that would be of interest to see. Plans, estate documents and pictures are often still in their original houses and languish in cupboards or estate offices, or hang on backroom walls. They may allow you to see and photograph them.

Look for planned views – usually there is an important view from the main reception room windows of the house, but there may be others you discover as you walk around the landscape – maybe a view back to the main house through the trees or there could be another view across to a building or garden feature.

Finally, your visit will be a great way to determine the aspect of your park or garden (south, west side of hill etc.); does it reflect the underlying geology and contours of the land; and the area outside the perimeter (edge of a wood, bordered by a modern development, a busy road or cultivated farmland.) All these categories combine to form the landscape's setting.

## Getting Access

- Public park, cemetery or pay-to-access garden
- Private garden or landscape park
- Our project introduction letter



If your site is open to the public, e.g., a public park, cemetery or other designed landscape which is freely accessible, you theoretically don't need to get permission to walk around, taking notes and photos, but you may get some funny looks if you're spotted, so it's a good idea to let the owner or manager know in advance what you want to do on the day, and why.

It's essential to ask for permission if the landscape is privately-owned, even if it's one that you can pay to visit.


If you can find the contact details for the person in charge, we can provide a standard letter for you to send to them, explaining what the project is trying to achieve and asking permission to visit. This can be emailed but sometimes a paper letter with your contact email and/or phone number, can produce better results.

You may find that the site owner or manager is really interested in what you're doing and has some historic information or anecdotes you could use, so it's definitely worth making contact. It's wise to do this fairly early as you can, as it may take a while to get a response.

Sadly, we may have some landscape owners or managers who do not reply to your request, or do respond saying no. If this is the case with your landscape, you can record as much as you see from public roads and footpaths, aerial photographs/Google Earth etc. Please do not be tempted to trespass!

## Recording Form

### Section 1



| Gardens Trust Green Futures Project, 2025-2026:<br>Site Record   |   |
|--|---|
| NB: * Indicates information required by Historic Environment Record (HER)<br>Please make sure this is included |   |
| <b>Section 1.</b>  |   |
| Site Name*   |   |
| Location*  | County: *<br>District or Borough: * <a href="#">Find your local council - GOV.UK</a><br>Parish: * <a href="#">Find your Parish - PARISH.UK Network</a>  |
| Type of Survey*  | Desk based / site visit   |
| Surveyed by:   | Volunteer's name/s  |
| Reported completed:  | Date  |
| <b>Heritage Assets</b>   |   |
| NHLE Names and Numbers*  | Any Listed Buildings and Scheduled Monuments within the landscape or relating to it. See Historic England's National Heritage List for England:<br><a href="https://historicengland.org.uk/listing/the-list/list-entry/">https://historicengland.org.uk/listing/the-list/list-entry/</a> ,<br>• Abbot's Hall, Grade II* Listed Building (LB), no. 1195859<br>• Abbot's Hall Fishing Lodge, Grade II LB, no. 1195860 |
| HER (Historic Environment Record)*   | To find any existing HER records (archaeology, buildings, designed landscapes etc.) within your site, search your county's Historic Environment Record (sometimes called a Sites and Monuments Record): <a href="#">HeritageGateway - Historic Environment Records</a> .<br>List them, e.g., Abbot's Hall (P/Med) Suffolk HER Number MSF12840. Monument: Canal/Garden/Garden House                                  |
| Is the designed landscape listed locally?  | Check the Local Planning Authority website.   |
| Is it in a Conservation Area?  | Check Local Planning Authority website or search yellow-shaded areas on your county's HER map.  |

This is the first page of the recording form, and we have filled it in with examples of what is needed in each section. Ideally, the majority of the first, and the next 2 sections, will be filled in before your visit. You can take paper copies with you, or you can use a digital copy on a tablet or laptop (weather permitting). For those of you coming to the meet up at the Food Museum next Tuesday, we will be looking at the forms and taking them around with us when we tour the site. Depending on the size of your screen today, you might not be able to make out most of the headings and entries here but basically the first section deals with which site it is, where is it, who is filling in this form and then identifying any historical listed structures, conservation areas etc., that are already on Historic England's National Historic Environment Register or the county Historic Environment Records (HERs).

Our finished reports are going to be deposited with the counties' Historic Environment Records. If any of you aren't familiar with HERs, they are an important starting point for anyone interested in the archaeology, built heritage, and history of an area. They provide information on a wide variety of buildings and sites, from finds of prehistoric flint tools to medieval castles, battlefields, Second World War pillboxes and historic parks and gardens. They're a primary source of information for researchers, planners and land managers. Your reports will go into the HER's grey literature library, which is a collection of unpublished reports that the public can request to view.

We would also like the reports to be added to Local Lists (sometimes called Local Heritage Lists). Not all planning authority areas have Local Lists yet, but where they do exist they play an important role in identifying non-designated heritage assets and celebrating and reinforcing a sense of local character and distinctiveness. Local lists can be used to recognise what communities value about their places and ensure this is considered as part of the planning process.

A third place your reports can be added to, are the websites of the appropriate county garden trusts.

## Recording Form

### Section 1 continued

| Landscape Summary and Description<br>(for the HER record)  |   |
|--|---|
| Summary*   | 1-3 lines briefly comprising name, type, period and designers (if known)                  |
| Description*   | More in-depth summary with reference to the items in the description section of the form. |
| Statement of Significance (brief notes, as bullet points)<br>For a large or complex landscape, consider dividing into character areas<br>NB. Complete this section <i>after</i> Section 2. |   |
| Owner Information (if multiple owners, please provide all known)   |   |
| Name   | Owners may prefer someone else to be the main contact, e.g. land agent                    |
| Address  |   |
| Telephone  |   |
| Email  |   |
| Main contact for the site (if different from above)  |   |
| Name   | Who did you communicate with and/or meet?   |
| Address  |   |
| Telephone  |   |
| Email:   |   |
| Owner/Occupier notes   |   |
| Any extra information not given above  | Keep polite! Research is open to freedom of information requests.                         |

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The landscape summary, description and statement of significance, are in the first section of the form but are probably the last boxes to fill in when you have completed all your research and visits, so don't worry about them for now and this may be an excellent exercise to undertake with your research buddies or someone else in your county group, as you can discuss your collective thoughts about what makes a site special. We will talk again about statements of significance later in the autumn.

The end of section 1 covers the owners' and/or site managers information, so the GT, HERs and Historic England have up-to-date contact details, as well as documenting who you met or had contact with.

Any information not covered by the owner or main contact boxes, can be added into the last box. As it says – be careful what is written here, as it will go into a publicly accessible database! Information here might include: the main house is divided into a number of apartments, each having their own section of the gardens, or it could be that you would need to record that you were not given permission to access the site or had no response from those you contacted.



## Recording Form

### Section 2

| Section 2. Outline History of the Site |  |
|--|--|
| Key Dates*                             | Principal phase(s) of development  |
| Key People*                            | Any important designers or historical figures associated with the site (this could contribute to a registration application)   |
| Events:                                | Was the site associated with any important historical events or movements? (this could contribute to a registration application)   |
| Influence:                             | Did the site change fashions? Is it a good example of its type? Does it appear in art or literature? (this could contribute to a registration application)   |
| Documentation*                         | Archival records or published sources relating to the site's history may add to its interest. Is it well documented?   |
| Major changes                          | Have there been any major losses to the landscape, or incursions from other development? Is it intact as a designed landscape?   |
| List of sources*                       | Follow your local HER format. Probably similar to this:<br>(1) Published document: Thoroton Society. 1939. TTS. P. 73<br>(2) Personal comment: Woodhouse WC. 1959. Pers Comm.<br>(3) Monograph: Cantor LM. 1983. The Medieval Parks of England: A Gazetteer. pp58-59<br>(4) Map: Sanderson G. 1835. 20 miles around Mansfield – 2 in.<br>(5) Map: OS. 1920. 1:2500, County Series 1920 |



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Section 2 allows you to write very brief notes on the history of the landscape – who were the key people who owned it, commissioned it or designed it (if this is known). Has there been any notable events or activities associated with the site. Is it a good enough example to have influenced fashions in gardens and landscapes or completely inspired the building of other landscape? Are there archives in public or private hands which document the landscape and its history?

Under major changes, describe any large changes in garden styles or has it suffered from modern development or has it been carved up between different owners?

The last box in Section 2 allows you to list the main sources of information you have used, to allow someone else to find these. And this is a timely reminder to be very methodical in making note of where you found information, including any archive reference numbers, websites addresses and the date you looked at the material. This is a good practice habit to adopt for all kinds of research, and I also write the source and reference number even if it did not contain anything of interest to you – it's a reminder that you have looked at it and don't need to view it again.



## Recording Form

### Section 3

| Section 3. Site Visit   |   |
|---|---|
| Date/s*   |   |
| Site Contact  | Person you met there  |
| Site visit by*  | Your name(s) and name of the project (Green Futures)  |
| Are there any threats to the preservation of the site?  | Have you noticed anything during your desk-based research. E.g. neighbouring construction, quarrying, swimming pool in the walled garden etc.?  |
| Are there any other issues and/or vulnerabilities that could potentially affect its preservation? | e.g., divided ownership, conflicting uses (internal to site), unsympathetic development (internal to site), lapsed maintenance, features/structures in poor condition etc.  |
| Are there any Stewardship Schemes relevant to the site?   | Ask the owner. Maybe Higher Level Stewardship – consult the <a href="#">MAGIC website</a> . Once you click 'get started' a new window opens with interactive mapping and you can search for live stewardship agreements by ticking the 'Land Based Schemes' and 'Agri-Environment / Environmental Stewardship' options. |
| Is there a management plan in place?  | Ask the owner and/or consult existing lists of Conservation Management Plans on Parks & Gardens UK <a href="http://www.parksandgardens.org/conservation/conservation-management-plans">www.parksandgardens.org/conservation/conservation-management-plans</a>   |
| Constraints encountered   | Anything that made visiting difficult?  |



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Section 3 will record details of your site visit, when you went, who you met and any activities or development that threatens the preservation of the site - include here which of the energy schemes could affect this landscape.

As you go round do you notice anything else which may potentially affect its preservation – unsympathetic recent buildings inside the site or features which haven't been maintained and are in danger of collapse or removal.

If you haven't been able to check whether the landscape has been part of any Stewardship Schemes using the MAGIC website, before your visit, remember to ask the owner or manager about this. Maybe they have chosen, or been required, to put together a conservation management plan (CMP). They possibly might be happy to share it with you (and CMPs should contain historical information), if not, there is a chance that the plans have been lodged on the Parks and Gardens UK database. Since my last webinar I have heard that this database is temporarily unavailable to view online – hopefully, it will be back future.

Lastly, in Section 3, were there any constraints on your visit, for example; areas you were not allowed to enter, or adverse weather conditions making your survey difficult. Hopefully, if it was the latter, you felt able to arrange another visit with the owner or manager.

## Recording Form

### Section 4

| Section 4. Description of the Site                    |  |
|---|--|
| Ordnance Survey 8-figure grid reference – site centre | E.g., AB 1234 5678<br>Use Grid Reference Finder website <a href="https://gridreferencefinder.com/">https://gridreferencefinder.com/</a> (Right click in the middle of your site or on a particular feature to find the 8-figure grid reference)  |
| Postcode:   | Use Grid Reference Finder, as above.   |
| Type of Location                                      | Include location in relation to settlements, roads, rivers etc.<br>Area of the site in hectares (use a free app like Google Maps Area Calculator <a href="https://www.mapdevelopers.com/area_finder.php">https://www.mapdevelopers.com/area_finder.php</a> ) and how the parts relate to each other.<br>What forms the boundaries?<br>What sort of land is adjacent? |
| Entrance points and pathways*                         | Where? Main dates, features and changes. What was the view as people approached?   |
| Main component areas                                  | Just a list of main character areas (this helps when compiling your report on site)  |
| Views and vistas                                      | Record direction and features. Any changes, through different phases of development?   |
| Landforms and earthworks*                             | Location, brief description including size, mark on maps if not obvious. Archaeological features will probably be on the HER.  |
| Water features*                                       | Such as lakes, ponds, rivers, channels, moats, fountains. Location, brief description including size, mark on maps if not obvious.   |



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Section 4 is the part that refers to your site visit and it would be a good idea to take this page with you as a checklist on the day. I would take a paper copy which has all the features and information I have found in my research, noted down and then a second copy (or a digital version of it) to add information found during the site visit.

You can see that we want to collect information about all the designed elements of the landscape, from buildings, paths, boundaries, water features and planned views, to planting beds, trees and woodland, as well as any archaeology which may pre-date the site. We also want to know how the site was divided up - you could name these areas and mark them on your map in advance.

How did people access the landscape in the past? Are there main and secondary entrances, and have these changed over time?

How were people meant to move around the landscape and have these routes remained or have they been altered?

Where were people supposed to stop and admire the view? Are these views still possible or has tree planting or self-seeded trees or built development obstructed these views?

Landscapes are not static, so we also want to work out what has changed since the original design was laid out. Have lakes or ponds been filled in or changed in size and shape, for example.

## Recording Form

### Section 5

| Section 5. Concluding  |  |
|--|--|
| Final comments:  |  |
| Site map attached?* (Please indicate ownership boundaries where known) | Yes/No<br>May an historic OS map you have drawn on, in the field, or later, then photographed/scanned. Could do separate maps for planting, statues etc.   |
| Labelled photographs*  | Yes/No<br>Essential to label each photo, preferably including direction you took photo in, plus date   |
| Photo permission attached?   | Please ask owner to sign photography permission form provided by GT, if including in your report any photographs of the landscape <i>not</i> taken from public viewpoints/rights of way.   |
| Drone images   | If using your own or others' drone images/footage, ensure that this is legal. Adhere to restrictions on no-fly zones; ensure operator has correct license; follow guidance on where to fly, according to size of drone. Check restrictions <a href="#">here</a> <a href="#">Flying remotely piloted aircraft</a>   <a href="#">UK Civil Aviation Authority</a> |
| Copies of useful source materials attached and labelled?               | Yes/No E.g. online articles, or clear photos of documents, maps etc.   |
| Sensitive information  | Ensure that you have asked site owner/manager to list any features not to be included (as photos and/or text) in final report. List these separately.  |



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The last section of the form refers to any attachments you'll be submitting with the main form. These would include at least one map, and hand drawn plans and other images, photographs, and increasingly, drone imagery (but this comes with lots of rules and regulations, and you do not have to include these!)

Finally, if there are any sensitive areas or features the owner is not happy with Joe Public being able to see, these must be listed here and not included in any final reports.

All the sections in the form should be filled in as concisely as possible, you can use bullet points if you prefer and you definitely don't need to worry about producing long pieces of flowery prose!

## Before you go

- Start researching history – make a timeline
  - Collect key maps, images
  - List features to look for



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These are the things we suggest you do before you visit for site:

Make a simple timeline for your house and landscape, so you are familiar with its key dates, when major building projects happened, the people involved (with their dates) - keep your larger research folder in the car to refer to if necessary, but out of the weather!

As previously mentioned, it's important to keep good records of your source materials so you can tell owners where you found the information, and importantly so you can include these on your form.

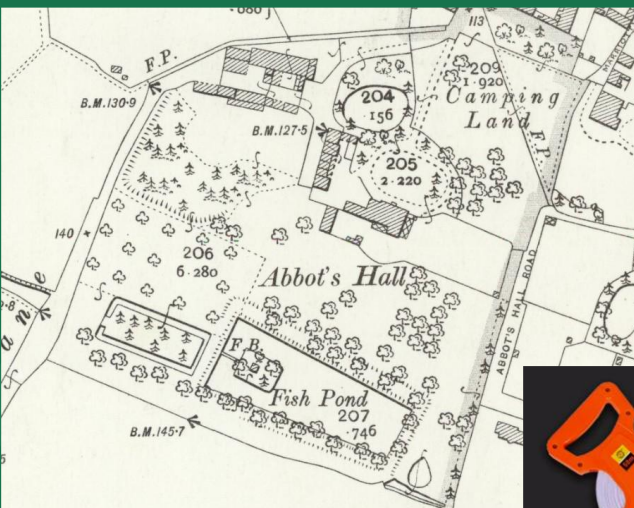
Also, write a list the things you hope to find on site, based on the research you have already done. That way you will not forget any of them once you are there. These might be been significant trees, avenues, statues, garden buildings, ponds etc.in the past but if they're now ruined or buried in undergrowth, they may be hard to find.

It's advantageous that you're visiting your site visits in the winter, as the lower vegetation makes it easier to spot features both above the ground and buried lumps and bumps beneath it. Views and vistas too, will be much more evident when the trees are not in leaf.

## What to bring

- Map to mark up
- Other key maps or images
- Notebook
- "Shopping list" of features
- Tape measure
- Appropriate clothes
- A research buddy
- Snacks!

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Detail from OS 25-inch map Suffolk LV1.7. National Library of Scotland website  
<https://maps.nls.uk/>



## What to bring

- Map to mark up – put this on a clipboard and bring a large, clear plastic bag to put over, in case it rains. Print this out as large as you can. If you only have access to an A4 printer, blow it up and print on several pieces of paper. This is a screenshot of Abbott's Hall where the Green Futures volunteers are meeting next week. It is a small site, so it doesn't need to be spread across two or more sheets, A4 is fine.
- Print outs of any other key maps/images you might want to check against the landscape – can you match a view today with an 18 Century painting of the site. Does the background in a photograph of a family posed in their garden tie up with a photo taken the same spot now? Does an earlier hand drawn plan explain some earthworks seen on your visit?
- A Notebook – for longer descriptions and sketch plans
- List of things you're looking for, and the recording form.
- A long tape measure, if you're particularly interested in trying to work out the age of old trees or measuring the size of foundations of a lost building. This 50m tape I bought new off a well-known online auction site for £7, but you don't have to buy one. For larger features you could practise your 1m strides for a rough estimate of size.
- An obvious point, but do dress for the weather, and the terrain regarding footwear. Fingerless gloves are really useful, so you can write in the cold, also you should wear a hard hat if you intend to explore old, crumbling buildings, IF they appear safe to go inside! Don't buy one specially, just observing the structures from outside will do.
- A research buddy – we would recommend going as a pair, or in threes. Having more than one pair of eyes is a bonus for not only spotting things but to discuss what you are finding, and for safety in case you end up in a lake or trip and fall. This buddy can be another Green Futures volunteer or if you decide to take someone else, please let us know as they have to be part of the project in order to be covered by our insurance when you are out on site. Drop Frankie an email with their name, date of your visit etc., please.
- Lastly, don't forget drinks and some snacks to keep you going!



## Recording Methods

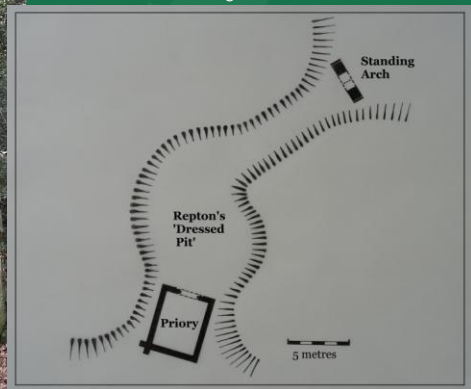


Garden 'Chapel' foundations (known as The Priory) and standing arch at Bracondale Lodge:  
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Sketch plan of Repton's dressed pit at Bracondale Lodge: ©S. Bate



How do you go about recording each area – whatever way works best for you. You'll probably develop your own methods pretty quickly; however, these are our suggestions:

- Ideally, first walk right around your landscape, studying it really well, getting the lie of the land and splitting it into different areas on your map.
- Then, have a more in-depth look at each area in turn – don't try and record it all at once, unless your site is very small.
- Label each feature with a letter on your map and then write in your notebook under each letter. If you can include a grid reference or GPS code as well, that would be brilliant but don't worry about it if not. This would be useful if you find something not shown on the map, but you can try and plot the position as close as possible with a dot, or a line drawing if it's a large feature like an earthwork.
- If you're looking at a very large landscape, divide it into character areas, e.g. west park, pleasure gardens, woodland, kitchen garden. Check with the owner if they use particular names for each area and use those if they do.
- Try and walk as much of the site as you can, don't just stick to the paths. If you venture out into parkland, woodland or scrub, you may find the remains of all sorts of interesting garden structures, planting, old routeways and archaeology not visible from paths and drives. But do be safe and ask the owner beforehand if there are any particular dangers you need to be aware of.

Here is an example of a recorded garden feature: Left photo, foundations of a 'garden chapel' known as the Priory; middle photo, standing arch, both built at Bracondale Lodge, Norwich. Left, the resulting plan of these two features and the connecting hollow way, drawn up from taking several measurements along its length. Not all sketch plans have to be this polished (this was for a book illustration) but they form a valuable record of the only surviving features of Humphry Repton's design for this landscape, and which is now hidden in the woods behind Norfolk County Hall.

- Finally, double check that you have looked at all the features on your list and on the recording form, before you leave. If you can carry out your survey in one day, that's best, but if the weather worsens or the site is very large and complex then a second visit may be required.



## Recording Methods



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- Take lots of photos on your phone. These will really help you as you write up your report. It is a good idea to put a number on your map to show where each photo was taken, maybe with an arrow to remind you which direction the camera is facing. Once you've uploaded them to your computer, remember to label them, including the site name and date. If we want to use any photos for anything other than the report, we'll need to get permission from the site owner and from you, the photographer.
- Please also take pictures of yourselves, as you do your site survey. If you're happy for the GT to use them, they're so useful to us in promoting projects like this and demonstrates to Historic England the valuable work you are doing.
- If you don't know what something is, e.g. a tree species, take a photo and either use a plant app to identify it, or send it to the group on WhatsApp and someone will know what it is.
- You don't need to fill in every box on the form, as some of the boxes might not be applicable. Any information you can add to the record is a bonus and will help others to understand and protect the site.
- As mentioned earlier, talk to the owner/gardener/manager/ or other regular visitors to the site – between them they are likely to know a lot!
- And finally, when you have completed as much of your form as you can, send them to your county lead volunteer by the end of April (but earlier much appreciated), the lead CGT volunteer will then forward them to Frankie and Tamsin.

If you get stuck with anything, you can email or WhatsApp me ([sally.bate@thegardenstrust.org](mailto:sally.bate@thegardenstrust.org)) in the first instance; or Frankie ([frankie.taylor@thegardenstrust.org](mailto:frankie.taylor@thegardenstrust.org)) or Tamsin ([tamsin.mcmillan@thegardenstrust.org](mailto:tamsin.mcmillan@thegardenstrust.org))

## Volunteer Expenses

- Help with travel costs
  - Archive costs
  - Contact ?



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You are generously taking part in this project as volunteers so you shouldn't be out of pocket because of it. We have a bit of project budget to help you with travel expenses (please lift share if possible) and cover the cost of copying materials in archives. Green Futures volunteers can request expenses claim forms from their lead CGT contact. We would rather you didn't save up all your expenses until the end of the project, so try and send these in regularly. The Lead CGT volunteers will then save all these up and send them in bulk to Frankie at the GT.

Volunteers must also save any screenshots or photos of receipts for travel and other expenses, such as photography permits. If there is something that's particularly expensive such as a digital file of a beautiful painting from a third party, then please run that by your county garden trust lead volunteer first or Frankie before you spend money on it. For the purposes of the forms take photographs if you can or use screenshots if the image is online.

There is an exhibition planned towards the end of this project, which is why we would love great images of you carrying out your research and recording activities, as well as super pictures of historic documents, images and interesting views in your landscapes.

## Project timetable

- **26 August:** Volunteer meet up at The Food Museum, Abbots Hall, Stowmarket
- **25 September:** webinar by Caroline Skinner (HE) 'Understanding Designation'
- **October 2025:** volunteer visits to county archives
- **October 2025** (tbc): webinar on uploading reports to heritage platforms
- **From now to April 2026:** volunteers research and record their sites and submit forms by end of April. Online and in-person meetings to share news and queries
- **May – October 2026:** travelling exhibition, end of project webinar and in-person volunteer celebration.



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**Thank you for taking part in Green Futures and undertaking such an important role – we look forward to hearing about all your discoveries.**

**Have fun!**

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