**Note for Advisers**

This document has been created to help guide you through the development of a tailored brief for a Parkland Management Plan using the PA2 Feasibility Study CS capital option.

Every site is different and will require a bespoke brief, and the format of this document is intended to provide some guidance on how you should amend the overall ‘brief’ to tailor it to your own circumstances.

However, historic parklands are complex, and understanding what might be needed can require specialist help. Where necessary, you should request specialist input via logging a request through [LM Hub](http://neintranettechnical/content/technical/applications/OSS/default.asp?ID=1).

Before finalising your brief, you should delete all the (i) information notes from the document, as well as this front page. They have been included for your benefit only. You should also have completed all the details marked in [yellow], and should have completely removed the highlighter formatting.

If you are supporting a PA2 application for the update of an existing Parkland Management Plan, you should review the existing document(s) against this brief to see which elements need further work and tailor your brief accordingly. You should also include the current parkland plan as part of the documentation.

This is a living document and will be updated over time on the basis of adviser and agreement holder feedback. Please send comments to Elaine Willett elaine.willett@naturalengland.org.uk

*Model Brief Guidance Version 1.0. Prepared by Victoria Hunns, Senior HE Specialist & Elaine Willett Senior HE Adviser, 9th May 2016.*

**Brief for a Parkland Management Plan** **under**

**PA2 Feasibility Study**

**For [Site Name]**

**Brief prepared by:** [Xadviser’s nameX & include reference to input from Other advisers/sources eg Historic England as appropriate]

**Date:** [XXXXX]

**For:**

|  |  |  |
| --- | --- | --- |
| [Agreement Holder Name] |  |  |
| [Agreement Holder Address] |  |
| [Agreement Holder Phone Number] |
| [Agreement Holder Email] |  |

1. **Introduction**

This brief has been prepared as part of an application for a Countryside Stewardship Feasibility Study (PA2).

It sets out the requirements for the development of a Parkland Management Plan for [XXSite nameXX]. Quotes for this work should take the form of a written specification which provides a full, detailed methodology demonstrating how these requirements will be met alongside a completed Pricing Schedule (Annex A).

* 1. **The site**

[Provide a brief summary description of the site here - including its location, agreement reference, size, habitat type(s), designations, etc. Include a map showing the extent of the parkland being considered as part of this work].

* 1. **Why it is thought to be significant**

[Provide a brief description of your current understanding of the significance of the site i.e. what is special about the site and why it is being considered for CS. This will have been informed by the work you undertook for the Historic Parkland Prioritisation Assessment, but may also include information you are aware of from other sources, such as books, Historic England or your County Gardens Trust and any other ecological or landscape designations.].

* 1. **Summary of the issues that need to be addressed as part of this Parkland Management Plan and why**

[Provide a brief description of your current understanding of the issues that are affecting the parkland – in terms of its character or significance as a natural and cultural asset. This is likely to be informed by the work you undertook for the Historic Parkland Prioritisation Assessment, which will have looked at ‘completeness’ of the parkland ‘elements’. It may include information you are aware of from other sources, such as SSSI or WPP databases or the Historic England risk register. If you have a copy of an existing parkland plan or survey you should include it as an Annex, so that contractors can understand what has been previously done and gauge what work is required to update it (if any)].

1. **Requirements**

*[Note for Advisers: You should tailor the requirements outlined below to reflect the information you need for your particular parkland. The overall aims are to*

* *Gather together all known information about the parkland to allow you to understand what you have, and why it is important*
* *Assess whether existing reports or surveys are sufficiently detailed or up-to-date to inform management decisions*
* *Fill in gaps in knowledge where these are necessary to understand how to manage your parkland in the future*
* *Understand the current condition of the parkland/features*
* *Understand the issues affecting the parkland/features, and which may need to be addressed through management changes/physical work*

## Task A: EVALUATION

## A1. Ownership, physical character and usage of the park

*[Note for Advisers: It is expected that task A1 is required for all parklands without amendment - it sets the scene for the rest of the document.*

*Where an existing Plan or report exists which includes this information you must ensure that this information is CURRENT and ‘fit for purpose’.*

In relation to the agreed area of the Parkland Management Plan, the consultant will [verify and update]:

1. Describe and map current ownership and occupancy details including leases, land managed under licence, trusts, acquisitions etc;
2. Describe the current use and management of the land including land management agreements, farming and forestry types, other business interests, etc;
3. Identify and map any national or local designations within, or directly affecting the setting of, the parkland
4. Identify other obligations, such as those required for Inheritance Tax exemption, charitable purposes, covenants, ‘live’ planning conditions, etc.
5. Describe how the parkland fits into the wider landscape context and identify any significant impacts that directly affect its character or setting;
6. Identify and map/record existing information about the site geology, soils, topography, drainage, climate, landscape designation if relevant;
7. Identify and map any public rights of way or other access arrangements, including permissive access where applicable;
8. Identify and map services, wayleaves etc;
9. Identify and map any known Resource Protection issues.

## A2. The history of the park and its development

In relation to the agreed area of the Parkland Management Plan, the consultant will [carry out/verify and update]:

### A2.1. Documentary research

*[Note for Advisers: The purpose of historic research is to identify what is known about the parkland and its development over time. These changes may have had an enormous impact on how the parkland looks today, how it is managed, the habitats that exist and its overall significance and will feed into to discussions about priorities for conservation or restoration. It is expected that tasks a-e are required for all parklands without amendment, except where this information has been clearly established in an existing parkland plan or report]*

Carry out archival and desk-based research to [draw together/update] detailed information on:

* 1. The history of its ownership.
	2. The development of the parkland landscape and its design over time, including the work by particular designers, and the arrival and loss of specific features.
	3. The land use of the parkland over time (for example, how it has been managed through agriculture, forestry, horticulture, etc).
	4. Events or activities in the park which have had a significant impact on visitor provision and/or the development of visitor attractions (e.g. 18th century carriage drives, contemporary play areas for children, etc).
	5. The broad historical context for the main phases of the site’s development (e.g. movements in aesthetics, fashion, politics, technology, key landscape designers).
	6. [For public parks, how the site came into local authority/charitable trust ownership or management and its subsequent development and maintenance as a public space].

### A2.2 Field survey

*[Note for Advisers: The purpose of field survey is to ensure that the significant characteristics of the parkland have been properly identified and mapped so that they add to our overall picture of ‘what survives where’. Mapping the features means that we can get a better understanding of the parkland as it is now, but can also avoid damaging significant environmental features through land management change or conservation proposals.*

*Field survey will generally use existing maps, plans and information as the ‘baseline’ for any work, which are then updated with new information. You should review any existing survey information available for the site (which is likely to include data held by third parties, such as the applicant) and consider if it is adequate. You may need to ask for specialist advice to help with this. It is expected that all Parkland Plans should include information on a-d as a minimum as a means of avoiding risk and defining opportunities.*

*Where surveys are already satisfactory and do not need repeating or updating, you should state this at the outset and include these as an Annex to the brief.*

*Where existing surveys are out-of-date, or contain insufficient data to properly inform land management decisions, you should describe what is needed in the sections below and include these as an Annex to the brief.*

*In addition to mapping features, as part of this process we also ask for contractors to identify any issues with condition or threats, as these may not be discernable from mapped or documentary evidence. This provides information on the ‘vulnerability’ of the asset and can inform the later discussions about priorities for conservation or restoration].*

[The following surveys are considered sufficient to inform decision-making, and should not be duplicated, but should be integrated into the draft and final Parkland Management Plan:

* XXXXXX
* XXXXXX]

These have been supplied in Annex XXXX]

Building on baseline information gathered through Tasks A1 & A2.1; undertake an appropriate level of survey of the parkland to capture on a map and in a gazetteer the information relating to:

1. the location and extent of surviving archaeological features and their condition, including the historic boundary of the site, and the threats and risk factors associated with each site;
2. the built historic resource (built parkland features) and their condition, and the threats and risk factors associated with each feature.
3. areas of woodland, copses and hedge lines, all scattered trees, veteran and historic trees (their location, number, species, estimated age, wildlife and landscape value, health/need for tree surgery, need for further survey etc.).
4. wildlife habitats, including designated areas such as SSSIs and their condition, and the threats and risk factors associated with each habitat/site/species.

### [2.3 Other survey]

*[Note for Advisers: Your parkland may also require additional surveys, the need for which depends on individual circumstances and you should spend some time considering if these are needed as part of the process of developing your understanding of the parkland and informing and prioritizing its future management. The following list of potential other surveys is not exhaustive and it is expected that you are likely to need to seek specialist advice to develop the requirements for these bespoke surveys.]*

* 1. [the hydrology of [location/feature information] ]

*[Note for Advisers: hydrological survey is likely to be needed where there are significant opportunities for the restoration of designed waterbodies or wetlands. Such large scale and complex proposals will almost certainly need their own PA2 Feasibility Study in order to provide detailed designs, specifications and tenders. However, preliminary hydrological surveys may be required at this very early stage in order to assess the general feasibility of such proposals, as well as their priority within the broader park-wide prioritised recommendations.*

* 1. [the topography of [location/feature information] ]

*[Note for Advisers: topographical survey may be required in defined areas where, for example, significant earthworks have been identified which could be adversely affected by an anticipated change in the parkland management or where more information on the features could inform the interpretation or management of the site. Topographical survey can also inform the restoration of ponds and water management systems through the identification of earlier drainage channels, leats and water systems.]*

* 1. [Geophysical survey of archaeological remains in [location] ]

*[Note for Advisers: This type of survey may be appropriate where there are known extensive below ground archaeological remains which could be adversely affected by an anticipated change in the parkland management or where more information on the features will inform the interpretation or management of the site themselves.]*

* 1. [Survey of XXXX species/ XXXX wildlife]

*[Note for Advisers: This type of survey may be appropriate where there are particularly rare species or habitats, or where the fragility of such ecological assets increases the risk of inadvertently damaging them through wider parkland management. For instance, a site containing a number of ancient/veteran trees may also require a saproxylic invertebrate survey in order to ensure that the correct trees are prioritized for capital works (such as tree surgery), that deadwood management policies are tailored to support any rare invertebrate assemblages and that other measures, such as the exclusion of stock or public access, are targeted on priority features. Similar detailed surveys might be warranted where land management is expected to need modifying in order to take full account of significant species such as breeding birds, lichen, funghi, bat, badger, water voles or otters.]*

* 1. [Access]

*[Note for Advisers: This type of survey may be appropriate if the parkland is a public open space or significant new access is proposed by the applicant or where existing public access poses an obvious and immediate threat to the condition of environmental assets within the park, and where more a detailed understanding of that public access is required in order to inform management proposals e.g. re-routing public rights of way, perhaps on a temporary basis, to avoid an ancient tree at risk of limb drop. In addition, detailed survey of existing public access might be required in order to inform the prioritisation of proposals for improved or new public access.]*

* 1. [Detailed/Specialist Tree survey – XXX]

*[Note for Advisers: This type of survey may be appropriate where there are known ancient or veteran trees and where detailed survey and assessment of each individual tree is required in order to inform and prioritise management recommendations e.g. surveys using the Veteran Tree Initiative Specialist Survey Method.]*

### A3: Landscape design evaluation

In relation to the agreed study area, carry out a visual survey of the current landscape to identify:

1. any surviving elements of the previous historic design phases, and their condition
2. current and surviving historic views and vistas (and any relationship between them or between other parkland features, such as an eyecatcher),
3. any relationships with current or past communities/settlements.
4. any sequential changes in parkland layout or extent
5. any existing features that either impact on the historic parkland or change its context

## Task B: ANALYSIS

Analyse the information gathered during the evaluation stage and produce a fully illustrated report that provides the following key elements:

##

## B1. Understanding the site and its vulnerabilities

1. A chronology of the historic park up to present day, highlighting key dates, ownership changes and events
2. Details of the development of the parkland landscape and its design elements over time, and their survival or loss, including
	* specific phases and/or work by particular designers;
	* significant vistas, views and features and their individual and collective contribution to the parkland;
	* how the design works now and historically;
	* sequential changes in parkland layout, extent or condition;
	* changes resulting from natural or other causes, such as storm damage or modern development
	* the overall condition of the historic parkland and its component parts
	* the current condition of the known archaeological, built and biodiversity assets in the parkland and their priority for management intervention
3. A visual synthesis of b (above) in terms of mapped and defined ‘character areas’
4. A brief summary of gaps in knowledge and any historic information not available

## B2. Significance

1. An assessment of the contribution of the park to its wider landscape setting, including its relationship with key significant features, such as the main house, ancillary buildings, local settlements, etc
2. An assessment of the component parts of the parkland and their contribution to the significance of the parkland
3. An assessment of the significance of the site in relation to its contribution to landscape history design, both in the UK and, if appropriate, abroad.
4. An assessment of its value and rarity, for example, in relation to a particular period; design or features; its level of survival, vulnerability, or documentary evidence
5. An assessment of the significance of any ‘associations’, such as with an event, person, sense of place or ownership; and its aesthetic qualities
6. A summary paragraph stating the site’s overall significance which supports, or otherwise, its restoration.

## B3. Issues and constraints

A summary of the issues and constraints that may affect the significance of the site as a whole and/or its character and historic, archaeological, ecological and resource protection features, including:

* Policy frameworks or Action Plans for the area
* Obligations/limitations imposed on management by, for example, designations or covenants
* Ownership (for example, multiple owners)
* Any form of access, wayleaves, field sports, licences and rights;
* Current or proposed estate and land management principles and practice;
* Event management or field sports, where applicable;

## Task C: APPROACH TO FUTURE MANAGEMENT

Using the outcomes of Tasks A & B:

**C1.** Develop a succinct ‘statement’ that summarises the overall Future Management Approach that needs to be taken with the parkland to safeguard its special interest and character.

**C2.** Set out the underpinning principles for implementing the Approach in terms of future planting and ongoing management of the parkland and its assets. This might include defining the period(s) of restoration, planting palettes, conservation principles and replacement strategies.

**C3.** Develop a Master Plan, in the form of a map and table, which identifies a series of prioritized and integrated Actions as a framework for delivering the Future Management Approach, cross referenced as appropriate to the detailed information provided in A & B. This should clearly identify

1. Where CS would be a key driver for delivering the Action/activity
2. Any dependencies between activities
3. Priorities for the activities over the next 10 years - divided into immediate (1-2 years), necessary (2-5 years) and desirable (5-10 years), with a ‘long term’ view of 20 years
4. Where any actions taken will result in longer term maintenance requirements;

##

## Task D: CONSULTATION ON AND FINALISATION OF THE DRAFT REPORT

On completion of Tasks A, B & C the consultant shall:

**D1.** Send a fully illustrated draft of the report and its underpinning information to the client, Natural England and agreed key partners and stakeholders (such as Historic England) at least [2 weeks] in advance of a meeting to discuss the findings.

**D2.** Organise and hold a meeting at [the parkland] with all interested parties in order to

1. Capture the outcomes of a full discussion of the findings of the report
2. Present the management approach and discuss the principles and priorities that have been identified
3. Inform Task E – the drafting of a schedule of work for an application for CS

**D3.** Following this consultation, amend the draft to reflect the comments received and re-submit it for ‘sign off’ by Natural England, before proceeding to Task E.

## Task E: SCHEDULE OF WORKS

Based on the outcomes of Task D, the consultant shall develop a Schedule of Works for a CS application, detailing the individual activities required to deliver the agreed priority repair/restoration proposals and optimum management of the parkland. This must:

* show a clear prioritisation of the work required
* Identify any ‘critical path’ in terms of the timing of proposed options or capital items
* be achievable under CS
* be based on the recommendations in the Parkland Management Plan
* be drawn up in conjunction with the client
* be in a format that can be readily used in a CS Capital Works Plan. (Full details of this are given in the [CS manual](https://www.gov.uk/guidance/countryside-stewardship-manual)).

The Schedule must comprise:

**E1.**  **Proposals for Annual Management Options**

The full extent of proposed CS annual management options, where necessary highlighting any suggested edits to any amendable management prescriptions or text.

**E2. Proposals for Standard Capital Items**

A list of all proposed standard Capital Items, where relevant including details of the techniques, location and timing of work that would be needed for successful delivery.

**E3. Potential for bespoke Capital Projects & Likely Costs**

Note to Advisers – Until the Parkland Plan process has been undertaken – including the prioritization of work (Task C) - it would not normally be appropriate to request detailed designs and specifications for bespoke capital items, such as HE1 within the parkland. Once their priority has been established, you will need to discuss developing a separate Feasibility Study (PA2) for the work as a separate activity, for which you may require additional specialist support.]

A list of any Bespoke Capital Projects, which are outside the scope of standard CS capital payments, but which have been identified as an ‘Immediate Priority’ for action as part of Task C2. Provide an indicative cost for each of the proposed bespoke projects in the form of:

* 1. Any feasibility study needed to draw up a detailed specification for the work
	2. The potential cost of the ‘physical’ delivery work.

## Task F: PRODUCTION & ARCHIVING OF THE PARKLAND MANAGEMENT PLAN

Following finalisation of the draft report, the consultant shall produce three paper copies of the approved Parkland Management Plan, alongside an electronic version in pdf format and submit these to [XXXXX]

.

In addition, the consultant should allow for [paper/digital] copies to be lodged by them with the local Historic Environment Record (HER).

The consultant must also add a record to Online Access to the Index of Archaeological Investigations (OASIS), using the online report form <http://oasis.ac.uk/form/> to include submission to the Archaeological Data Service (ADS)

1. **Timetable**

*[Note for Advisers: To be able to check each tender against our criteria, you need to include a requirement for the contractor to supply a timetable which demonstrates that they can deliver the work within the required timescales– for example, by the date at which the PA2 would need to be completed, and in doing so, to have recognised if there are/may be limitations on timings for survey work, etc.]*

[The Parkland Management Plan and Schedule of Work must be finalised and submitted to the Client and NE by **XXXXX].**

The Consultant shall provide a work programme identifying how they will meet the requirements of the brief. This should include:

* 1. A timetable, such as a gantt chart, which demonstrates how they would deliver the work against the required timescale and indicates project milestones and any dependencies or limitations – such as timings for survey work
	2. the time allocation for each stage of work
	3. the time input and day rate by each (named) member of the Consultant team
1. **Relevant Experience**

*[Note for Advisers: To be able to check each tender against our criteria, you need to include a requirement for the contractor to demonstrate that they have suitable & relevant experience of working to the required standard.]*

The lead consultant shall be [a Chartered Landscape Architect] and have substantial experience of developing parkland management plans, including in the context of agri-environment scheme delivery.

It is expected that all of the consultants or sub-contractors involved will have appropriate professional accreditation at a level commensurate with their role in the project - for example, membership of the Chartered Institute for Archaeologists, the Landscape Institute, or are conservation accredited by the RIBA, RICS or the AABC (Architects Accredited in Building Conservation Register).

The tender response should include:

* 1. the project team structure
	2. a short profile/CV for each member of the team that will be working on the project, indicating their relevant experience in projects of this nature and their professional accreditation and their role and responsibilities
	3. 3 examples of similar previous work undertaken in the last three years for public or private sector clients, including the names and contact details for these referees
1. **Liability and Indemnity**

*Note for Advisers - To be able to check each tender against our criteria, you need to include a requirement for the contractor to demonstrate that they have or will put in place an ‘appropriate level’ of insurances. Please see HE1/PA2 guidance/guidance from Institutes for examples of appropriate levels of insurance according to the type of project.*

## The contractor shall have in place (or be willing to have in place) an appropriate level of Professional Indemnity Insurance of no less than [£500,000]; Public Liability Insurance of no less than [£2 million] and Employers Liability Insurance for this work and to provide Certificates of Insurance as confirmation of the level of cover and any exclusions.

1. **Report requirements**

##

Consultants shall ensure that:

* Draft and final versions of the Parkland Management Plan are clearly labelled with a full explanatory title, their status and date;
* All sections of all versions are adequately and sequentially numbered;
* All people and organisations involved in developing the plan are acknowledged;
* All relevant maps/estate plans and illustrations are fully cross-referenced to the text.
* A bibliography of all primary and secondary sources consulted must be included in the appendices, even if the source proved unhelpful.
* Appendices are cross referenced to the text and include all relevant information, including the results of any field survey
* The final Parkland Management Plan should be produced mainly in A4 format for ease of use. Where this is not possible, A3 format should be used.
* Maps, plans, illustrations and photographs must be full colour where original material is in colour or where colour is essential to preparation of new, illustrative material.
* Where possible, tracings or digital scans of historic maps/estate plan should be produced as overlays at the same scale as the modern Ordnance Survey base map.
* Any supporting photographic/digital copies of original maps or images must be reproduced clearly, to an appropriate resolution, along with their scale
* If GIS is used in the recording and presentation of historical and archaeological data, please note that NE uses ArcGIS.
1. **Licensing and Consents**

Consultants will be responsible for organizing and obtaining any licenses and consents that may be required for the work. These should be itemised in the tender and any impact on the timing of the project or its tasks acknowledged. Documents will need to be submitted to NE before works start on site.

1. **Ownership**

*[Note for Advisers: When you (or an agreement holder) ask or commission another person or organisation to create a copyright work for you, the first legal owner of copyright is the person or organisation that created the work and not the commissioner, unless you otherwise agree it in writing. Any contract that requires electronic or hard copy outputs should therefore make clear what permissions the author of the report assigns to the commissioner in terms of copying and using the material].*

Given the high level of public investment in these reports, Contractors will need to agree to be bound by the following requirements:

“You agree to:

1. grant to Natural England and [XXXthe agreement holderXXX] an irrevocable, perpetual and royalty-free licence to use, copy, keep and disseminate the Outputs as they see fit and to grant sub-licences of the same kind;
2. obtain and maintain in force all authorisations of any kind required for you to use, copy, keep and disseminate the Outputs and to grant such licence to us;
3. contract to the effect that any creation by you or on your behalf of material which forms Outputs is undertaken on terms that either the copyright in the material is assigned to you or that the copyright owner may not commercially exploit it;
4. grant licences in respect of the Outputs under the Creative Commons model licence ‘Attribution Non-Commercial’ but not on other terms without our prior written consent;
5. not otherwise exploit the Outputs commercially without our prior written consent from Natural England and [the agreement holder].”

Please note that the quotation should include all expenses in the total overall cost as there will be no allowance for adding in these costs later.

1. **Tender Returns & Clarifications**

*[Note for Advisers: Advisers can provide further clarifications on the content of the brief/requirements if the matter is technical, but only via the applicant.*  *Unless they are of an individual nature, any responses to queries or clarifications must be shared with all of the tendering organisations to ensure that they have the same information when preparing quotes.]*

The contract will be between the consultant and their client, [XXXXinsert Agreement Holder name hereXXX] and Tenders should be submitted in accordance with the timescales set out in their request for a quote.

Contractors with any queries during the tender period need to address these directly to their Client.

**Annex 1: Pricing Schedule for [XXXParkland NameXXX]**

**Costs supplied by**: [To be completed by Contractor]………………………..

**Date of Quotation**: [To be completed by Contractor]…………………………

|  |  |  |  |
| --- | --- | --- | --- |
| **For the completion of** | **Sub-tasks** | **Cost exc. VAT** | **Cost incl. VAT (if applicable)** |
| **Task A: Evaluation** | A1: Ownership, physical character and usage of the park | £ | £ |
|  | A2.1. Documentary research | £ | £ |
|  | A2.2 Field surveys: |  |  |
|  | 1. Archaeological
 | £ | £ |
|  | 1. Built resource
 | £ | £ |
|  | 1. Woodland/tree
 | £ | £ |
|  | 1. Wildlife/habitat
 | £ | £ |
|  | [A2.3 Other survey – add a new line for each separate survey/delete this item as appropriate] | £ | £ |
|  | A3: Landscape design evaluation | £ | £ |
|  | **Task A Subtotal** | **£** | **£** |
| **Task B: Analysis** | B1: Understanding the site & its vulnerabilities | £ | £ |
|  | B2: Significance | £ | £ |
|  | B3: Issues & Constraints | £ | £ |
|  | **Task B Subtotal** | **£** | **£** |
|  |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **For the completion of** | **Sub-tasks** | **Cost exc. VAT** | **Cost incl. VAT (if applicable)** |
| Task C: Approach to Future Management |  | **£** | **£** |
| **Task D: Consultation & Finalisation of the Draft Report** |  | **£** | **£** |
| **Task E: Schedule of Works** |  | **£** | **£** |
| **Task F: Production & archiving of the agreed Parkland Management Plan** |  | **£** | **£** |
|  | **Overall Total**  |  |  |

Signed …………………………....................

On Behalf of ……………………………………

Position:…………………………………………………………………

**Annex 2: Supporting Information**

[To include: Previous surveys or Parkland Plans referred to in Task A or B]