

A GUIDE TO
PRODUCING
PARK AND
GREEN SPACE
MANAGEMENT
PLANS



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Introduction to this guide



Success is measured by the public by the change delivered on the ground. Brixworth Country Park, Northamptonshire (Green Flag Award winner)
Photography by Bob Fielding

This guide has been produced to enable anyone involved in the management of publicly accessible parks and green space to write management plans that help them to manage, maintain, develop and improve their green space in the most appropriate way.

The guide is the result of discussions between CABA Space and a range of stakeholders. In particular feedback both from applicants and potential applicants to the Green Flag Award scheme and from its judges suggested that many applicants were experiencing difficulty in putting good plans together. CABA Space recognises the potential benefits that effective management plans can bring, and is keen to promote their wider adoption. Government also recognises the contribution of quality green spaces to building sustainable communities, and in delivering the Liveability agenda.

The organisations involved in the production of this guide have tried to make recommendations that fit a wide range of circumstances and applications, ensuring that the people responsible for managing parks and green space do not have to produce several different versions of their management plan depending on its intended use. Managers should, however, be aware that these various programmes would still expect their specific requirements to be incorporated in a management plan submitted to them. For example the Heritage Lottery Fund (HLF) ten-year management plan will require more emphasis on staff structure and resources (see annex A), and plans supporting Green Flag Award entries should make accurate reference to the area's wider strategic aims (and thus reduce the need to send further documentation with the Award entry).

A PRIMARY
INTENTION OF
THE GUIDE IS

To encourage wider use of management plans by dispelling the myth that the creation of a site management plan is an exceptionally difficult task that can be undertaken only by an expert.

A further intention is to illustrate the value of management planning as a process in itself.

Of course some management plans will be better than others, but in nearly every case, any management plan that has been reasonably well thought through will be better than none at all. After all, the measure of success is not the plan itself but the change it delivers on the ground and in the community.

The findings of management plan reviews and interviews with practitioners have helped enormously in the development of the guide, and where possible case study examples have been used to illustrate specific points.

*"No plan is complete,
your first plan is
always incomplete.*

*Within five years you can
sort this out so that the
next one is better still.*

Good plans evolve."

Who this guide is written for

The traditional audience for management plan guidance is local authority officers. Usually these officers would be working at middle to senior management level. They might be part of the management team responsible for managing the entire park and green space service, or they might be part of a team dedicated to a single site.

In addition to these officers, other organisations and individuals are becoming increasingly involved in the management of parks and green space. These include community-based organisations such as 'friends' groups, charitable and trust-based organisations and public utility companies. Provided they are publicly accessible, the sites these organisations manage are just as likely to need and benefit from a management plan as any site owned and managed by a local authority.



Private businesses in green spaces and staff of council run facilities are both interested parties.
Photography by Joe D Miles

Many areas of green space are successfully managed by a partnership of different stakeholders:

- parks departments;
- other local authority departments;
- the community and its representative organisations;
- national agencies;
- businesses;
- non-government organisations.

How to use this guide

This guide is presented in two main parts:

PLANNING THE PLAN —

provides a broad outline of the potential benefits that a

well thought out

management plan can bring to site management and identifies the steps you need to take before you actually write the plan.

CONTENT AND STRUCTURE OF THE PLAN —

provides a list of subject areas that a

comprehensive management plan

should cover and presents these in a logical order.



A specific feature or aspect makes each site valuable in the wider strategic context of local provision. Abbey Park and Grounds, Leicester (Green Flag Award winner)
Photography by Dave Harris

Although many green spaces have a dominant characteristic and are particularly valued for one aspect such as nature conservation, heritage landscape or recreation opportunities, this guide takes for its model a site that is valued for a range of qualities and facets and all sorts of services for different users.

Not all green spaces will require a management plan that covers all the topic areas mentioned in this guide or in as much detail. Managers setting out on the process will need constantly to consider what is appropriate for the site they manage.

Managers with a high level of experience and knowledge of their green space will be able to determine quickly what is or isn't appropriate for inclusion in their plan. However, it is recommended that these managers should still work through the guidance and take time to consider each of the points before deciding which should be included or excluded. They should also take time to listen to the views of others and involve them in the decision making, especially if the management plan is intended to resolve conflicting uses or issues on site. In this process managers get a chance to review, to take stock of the aspects of the site that are already recognised as important and to consider those that have the potential to become important.

The guidance provides a mechanism to managers with less experience of site management and less depth of knowledge about their area of green space for assessing what is important about the site. Working through the guidance will also assist these managers to make decisions about what needs to be included in the management plan.

The guidance gives advice for dealing with specialist areas of concern, and where possible it will refer to other more expert guidance. When deciding on what needs to be included in the management plan, managers should be guided by the characteristics of the site – they need to know what is valuable and what is vulnerable, what is possible and what is reasonable. Above all, they need to know what is appropriate. What is valuable should be enhanced, what is vulnerable should be conserved and protected and naturally anything that is impossible or inappropriate should be dismissed. A successful management plan should allow improvements to be made while not undermining those characteristics of the site that attract users and make the green space valuable.

"The most useful part of the process of writing the plan was to stand back and evaluate what we have."

Oldham Metropolitan Borough Council Officer



PART I
PLANNING
THE PLAN

Part 1: Planning the plan

"While protecting a park from outside intrusions,

managers must also preserve it from abuses within.

It is important that these demands be weighed against the park's dominant character and overall use preferences...

The purpose of good park planning is to place all parts in a harmonious relationship."

Why is the management plan needed?



The management plan can identify ways of involving the community from stalls and events to long term working groups.
Courtesy of ICD photography

The primary reason for developing a management plan is to aid the efficient and effective management of the site.

However, there are related but more specific reasons why managers might wish to develop a management plan for the site. These have a direct impact on the structure and content of the plan and of course on how the park or green space is run.

Below are a number of possible reasons for developing a management plan. They have been taken from a number of existing guides, that are listed in references at the back of this guide.

1 Consultation, involvement and consensus

- To resolve conflicts of interest.²
- To promote interest and support.²
- To encourage community involvement.²
- To ensure that all interested parties agree to standards.³
- To involve all stakeholders, officers and elected members.³

2 Continuity and capacity

- To guide future management and ensure continuity of management.²
- To review the nature and performance of the management structure.³
- To identify and describe the management required to achieve the objectives.⁴

3 Preparing for change

- To monitor and assess change on the site.²
- To identify future requirements.²
- To identify external factors that may affect the site.⁴

4 Information and recording

- To ensure a site is properly described.²
- To achieve comparability of data collection and recording.²
- To identify areas of responsibility within a local authority for managing the green space.³

5 Framework for decisions

- To help managers react positively to a changing world.²
- To ensure clear objectives of management are laid down.²
- To identify what we are aiming to achieve.⁴

6 Setting standards

- To assess a site's importance relative to recognised standards.²
- To ensure that all interested parties agree to standards.³
- To set benchmarks against which delivery and performance can be measured.³

7 Strategic planning

- To enable communication within and between sites and organisations.⁴
- To achieve comparability of approach to different sites.²
- To ensure a balance of provision within a catchment area.²

8 Action planning

- To cost work, to bid for funds or to assess grant aid.²
- To programme and schedule work.²
- To develop and cost a way of managing and maintaining a park to safeguard its values.³

Other important reasons not sourced from existing guidance include:

- To promote positive use of the site, for example by reducing anti-social behaviour.
- To establish the resources required to achieve and sustain quality and value.
- To identify and secure the skills required.
- To identify and attract additional resources where necessary.

In addition the aspiration should be:

- To establish the management plan as a controlled or maintained document within an overall management system.
- To seek ISO9001/2 and ISO14000 certification for the system of which the management plan is a part.

Who needs the management plan?

A management plan, in its structure, content and style of presentation, must take into consideration who will be using it and how. Because the potential audience is quite diverse, writers of management plans should consider who the audience is for each section of the plan, and decide what level of detail to include. In some cases, it might be appropriate to give detailed information within the main body of the plan that would normally be included only as an appendix. This might be the case when a proposal has quite significant implications for a large and diverse section of the audience. Here the management plan will need to demonstrate that the proposal has been properly thought through taking into account the various interests and detailed supporting facts and information.

Management plans are written to guide the efficient and effective management of the park or green space. The people who are responsible for the day-to-day management of the site are therefore among the primary audience. This means that writers of management plans need to keep in mind their own needs and requirements as users of the plan. They are likely to require fairly technical information that addresses all the important elements of site management and control and that helps them plan and deliver the services the green space needs.

The visitors who use the park or green space and the community who live and work nearby are another important audience. The word 'community' should be taken to include local businesses, schools and colleges, as well as residents. They will want to know how the proposals in the plan affect their and their family's enjoyment of the site. They will want to know if the particular aspects of the site that they care most about will be retained, enhanced or made worse by the proposals in the management plan. If their favourite aspects of the site are in any way threatened by the plan, they will require clear and convincing justification for the proposed change.

IT IS THE COMBINATION OF THE CHARACTER OF THE GREEN SPACE AND THE NEEDS AND EXPECTATIONS OF THE WIDER COMMUNITY, INCLUDING PEOPLE WHO DO NOT USE THE GREEN SPACE, THAT INFORMS EVERY STAGE OF THE DEVELOPMENT OF THE MANAGEMENT PLAN.

A number of other parties should also be considered as part of the audience for the management plan. Among them are more senior managers, elected members (politicians) and trustees, governors or members of a management committee or board of directors. These are the people who will make decisions that directly impact on the site and its management, and who are likely to control the allocation of financial and other resources. They will need to see how the management plan helps to achieve the organisation's wider aims and objectives and how it conserves or enhances the contribution made by the green space.

The staff or volunteers who directly deliver the on-site services are also among the target audience, as the management plan will directly affect the kind of services that they deliver and the way in which they are delivered. They require clear and concise information that assists them to do their jobs and plan their daily activities. The management plan should show them how their work contributes to the wider strategic development of the green space and provide a reasonable justification for any changes to their working practices.

There may also be tenants or private businesses operating from the site, who will want to know how the proposals in the management plan affect their business or their tenancy arrangement.



Top: Day-to-day managers of the site need to know who uses (and doesn't use) it.
Courtesy of ICD photography

Bottom: The management plan should lead the process of setting work programmes. These can be aligned to different use periods eg. quiet times of year used for maintenance. Hampstead Heath, London (Green Flag Award winner)
Courtesy of ICD photography

"We have found that the process of producing the plan achieves benefits in addition to winning *Green Flag Awards and that the style of our plans means that they are accessible for all staff and the community who need to understand their part in the process."

Oldham Metropolitan Borough Council Officer



Provision requirements may change with the demographic of the local population and be affected by other local green spaces. Coalshaw Green Park, Oldham (Green Flag Award winner)
Photography by Paul Ogden

How will the management plan be used?

The case studies that informed this guidance suggest that a good management plan should become an integral part of the day-to-day running of the park, as well as guiding the strategic management process. Many of the managers spoken to reported that the plan is referred to constantly and that most staff keep a copy close to hand all the time. These are some of the ways in which the managers make good use of their management plans:

- To develop monthly and quarterly work programmes for operational staff;
- To support the annual budget-setting process;
- To identify requirements for additional financial resources;
- To keep customers, elected members and mayors aware of management priorities and thereby control or discourage unreasonable demands for additional services or facilities;
- To communicate to others their responsibility to deliver services that impact on the site, eg. impact of poorly designed and maintained pavements and roads to access and visual amenity;
- To monitor success and progress against management targets.

“ Don't underestimate the amount of time it takes to manage relationships in the management plan process.

You need to allocate resources to this side of the project.

This was a key learning point for us. ”

Cheltenham Borough Council Officer

Who should be involved?

To be most effective, a management plan must be accepted, supported and owned by everyone who has a concern or interest in the park, which includes:

- everyone involved in the management of the park;
- everyone involved in the maintenance of the park;
- everyone who uses the park;
- independent businesses that operate in the park;
- the people who live in, near or around the park (including those who do not use it);
- the elected members or trustees responsible for making higher-level strategic decisions that impact on the park, such as the setting of annual maintenance budgets;
- other service delivery teams that have an influence on access, visual amenity and local environmental quality;
- local businesses that may not have a direct relationship with the park.

At some point, all of these interested parties will make their individual decisions about whether or not they support or reject the management plan. This guidance suggests that they are more likely to accept and support the management plan if they feel that they have been involved in its development and that their concerns have been considered.



Young people have ideas and local knowledge and have a valuable contribution to make.

Photography by Dinah Kenyon

Taking time to canvass opinion and involve more people in the early stages of developing the plan is a very worthwhile exercise that could in the long run save a great deal of time and effort.

Who will write the plan?

How the plan is to be developed will largely depend on the amount of staff time and financial resource that can be given over to the process. Options include:

- One person or a small team of people take responsibility for jointly developing and writing every aspect of the management plan.
- Consultants may be employed to develop the plan or aspects of it, according to your brief or identified needs. Consultants must work closely with you, otherwise you will lose ownership of the plan.
- One person or small teams of people are assigned to take responsibility for individual aspects of the plan, such as:
 - physical areas of the park;
 - topic areas such as children's play or ecology;
 - areas of service delivery such as cleansing, horticulture or patrolling.

In some cases, community groups working voluntarily in the park may actually be responsible for writing the management plan. However, if paid members of staff are writing the plan, you might still consider the potential for involving volunteers, who can be a valuable resource in many ways, such as:

- collecting species and habitat data;
- identifying issues;
- bringing local knowledge to suggested proposals;
- assisting the consultation process by staging exhibitions and displays;
- encouraging acceptance of proposals among the wider community;
- reviewing proposals and suggesting alternative approaches;
- carrying out customer/user surveys.

Whichever approach is taken, it is recommended that one person take overall responsibility for the management plan. The first stage is to write a proper brief and ensure the approval of stakeholders. Then to ensure that the right information is collected, the right people are involved, deadlines are met and the component parts of the plan all come together to create a cohesive whole that is sensible, easily read and understood and that meets the original objectives. Ideally, the person taking responsibility should be part of the team delivering the action plan and also involved or responsible for monitoring and review.

Left: Community groups may assist in public consultation and stage displays. *Courtesy of The Countryside Agency/ Doorstep Greens*

Right: Different service delivery teams will bring specialist knowledge, and ensure buy-in across departments. University Park, Nottingham (Green Flag Award winner) *Photography by Ian Cooke*



What will the plan achieve?

The management plan helps to clarify management aims and objectives, the methods of achieving those objectives and the methods of measuring and monitoring success. However, a management plan will achieve nothing unless the people who are responsible for the site use the plan. A management plan is simply a tool and it is the skilled use of the tool that produces results and achievements. A management plan should also be seen as part of the process of management planning, which is continuous and goes beyond just producing a document.

When management plans are correctly used and frequently referred to, they assist managers to:

- prioritise effort and resources;
- justify and gain support for new initiatives and methods of working;
- establish the resources required to achieve and sustain quality and value;
- secure new resources;
- identify and secure skills required;
- establish standards of conspicuous care;
- protect against unplanned and poorly considered developments and changes;
- protect against long-term decline eg. paths and water circulation infrastructure;
- create a culture based on improvement and goal achievement rather than just preservation;
- provide the park or green space with its best chance to meet the needs of the local community and remain relevant and needed.

What will the plan look like?

As management plans are often used to support applications for capital grants and award schemes, it is worth considering the appearance and presentation of the document and making sure it is up to standard. It is not necessary to spend a lot of money on presentation, but the use of graphs, photographs, maps and site plans is of great benefit.

There is no right or wrong format for the plan. Successful plans vary tremendously in terms of size, structure and appearance. The most important consideration is that the plan serves its main purpose of guiding and assisting the work of those responsible for conserving, managing, maintaining and improving the park or green space, and keeping everyone with an interest in the site informed about management's priorities and direction.



Top: Design is an important consideration in green space, but also in how to present a management plan.
Courtesy of EDAW/Dixi Carrillo

Bottom: Local volunteers will have knowledge to contribute to the plan.
Courtesy of The Countryside Agency/Doorstep Greens

What resource is needed to complete the work?

The level of resource required to write the management plan will depend on the approach taken, the size and type of the site and the complexity of the issues involved. It also depends on the amount of information you already hold.

If a consultant is employed, the project will still need to be managed, and sufficient time should be allocated to completing this important task. The work required of the consultant will need to be defined, progress must be monitored and advice given and decisions made whenever more than one option or solution is developed. Without regular liaison with the consultant and a reasonable degree of involvement in the process, this opportunity to increase knowledge, expertise and skills is simply lost.

The alternative approach is to do it yourself. Many of the management plans that were reviewed in developing this guidance were written by small 'in-house' teams or individuals, the main cost incurred being staff time.

If the park or green space is looked after by a local authority, it may be possible to identify staff in other departments or working in other parks who are willing to assist in the process. Support and expertise may come from:

- landscape architects;
- ecologists;
- environmental management specialists;
- community development workers;
- planners;
- engineers;
- youth workers;
- park rangers;
- recreation managers;
- play development workers;
- other service delivery teams.

It is important to ensure that whoever is given the responsibility for contributing to or producing the management plan be given sufficient time to complete the task.

It may be possible to enlist the help of local volunteers to undertake specific tasks. Any community group that has been involved with the park for some time will have a considerable amount of knowledge and expertise. Even if a group does not exist, there may still be local residents who are willing to assist with the process.

Alternatively, students can sometimes be found who need to gain experience in this type of work in order to gain their qualification. If community-based volunteers or students are used, they need to be provided with adequate support and guidance.

Information is a very valuable resource. In many cases a wealth of existing information will have been gathered over recent years.

The budget and staff resource available to produce the management plan will play a large part in determining the degree of depth and detail that can be included in the plan. So too will the availability of volunteers or students and the amount of information and well-developed ideas that have already been produced.

It was generally agreed among the managers that were consulted that limited resources should not prevent the development of a management plan. Any plan that at least considers what is important about the site and what needs to be conserved or improved is likely to be better than no plan at all. It is perfectly acceptable to identify in the plan what extra work or research is needed to fill out existing information. The person responsible for producing the management plan will have completed his or her task successfully if a timetable is clearly laid out in the action plan to resolve areas of weakness. This will begin a process that offers room for expansion.

When will the work take place?

Treating the development of the management plan as a project will help to ensure that it is completed within a reasonable time. The project will benefit greatly if realistic targets are set for completing each element of work. The timetable should identify the following targets:

- When will work on the plan start?
- When will each part be completed?
- When will the management plan be completed?
- When will the plan be implemented?

When will the plan be updated and replaced?

It is important to decide for how long the management plan will apply. More can be achieved in a longer period such as five to ten years, but equally the whole process requires greater levels of thought, as mistakes may have far greater implications. More consideration needs to be given to predicting potential changes and their impact on the green space. A longer-term plan will require greater levels of revision as issues arise or change over the years. There may be instances, for example in advance of a major internal restructuring or during a restoration period, where a short shelf-life is acceptable. However, since a management plan requires a full information base, it is not recommended to have a shelf-life of less than three years.



Key milestones such as restoration will affect the shelf-life of the plan.
Photography by Peter Neal

It is essential that the management plan indicates at what intervals and by what process it is reviewed and updated.

FOR EXAMPLE

the work plan will need to be updated annually but the policy review may need to be updated only after five years.

How will the work be done?

Whether you plan to produce the management plan entirely 'in-house' or use consultants to produce aspects of the plan or the entire plan, you will need to decide on the following:

- Who will take overall responsibility?
- How will decisions be made?
- Is higher authority needed, and at what points?
- What are your aims and objectives in relation to the process of writing the plan?
- Who will be responsible for each element of work?
- What additional information is needed?
- Where will you get the information from and how will you acquire it?
- How much time can be allocated to the work?
- By when does the work need to be completed?
- What are the main issues that need to be tackled?
- What support and advice do you need, and where can it be obtained?

The process of writing a management plan demands an enquiring mind and a willingness to undertake investigation. As you work through the plan, issue by issue, you will identify areas where more knowledge or information is needed in order to make the right decisions and choices. It is important that these areas of deficit are acknowledged and considered, and there are a number of different local sources of potential help:

- Colleagues in your own team or department or in other departments may be your first port of call.
- Visitors are often an excellent source of information, especially about the history of the site. If there are existing user groups or community groups associated with the site, speak to them and involve them in the process. If not, you can use the development of the management plan as a way of establishing a community group. You should also consult your customers about their needs and aspirations for the site and any requirements they may have that are not being met.
- The local history section of your library may hold valuable information about the history of the green space. The local museum service may also be keen to be involved in a project.
- The planning department can also provide demographic information and population trends.
- You could also try contacting people who are responsible for other areas of green space, neighbouring local authorities or perhaps other community organisations, and ask them if they have any advice to offer.

At an early stage in the process of developing a management plan, it is important to spend some time pulling together any existing information about the green space. All sorts of work may have been done recently on specific issues of site management. This might include:

- ecological survey work;
- tree survey work;
- facility audits;
- quantitative green space assessments;
- hydrology surveys;
- visitor surveys;
- archaeological surveys;
- community consultation information;
- heritage appraisals.

Bottom: Writing a management plan provides a good stimulus for forming a community group. Courtesy of The Countryside Agency/ Doorstep Greens



CASE STUDY Wellington Park, Wellington, Somerset

CONSULTANTS PROVIDED EXCELLENT SUPPORT TO MANAGEMENT. PLANNING IN THIS URBAN PARK, BUT THE TEAM DIDN'T LOSE SIGHT OF ITS ROLE IN THE PROCESS.



The plan was put together by a team of people from the authority with support from external consultants. The team of staff from Taunton Deane Borough Council included policy (Leisure Development Manager and Community Parks Officer) and operational staff (Assistant Head of Works, Supervisor, Nursery Manager and Site Gardener).

It is important to look to existing information such as heritage appraisals. Wellington Park, Wellington, Somerset (Green Flag Award winner)
Courtesy of Steve Cuthill & Taunton Deane Borough Council

The consultant set up the framework for the plan, brought together all the necessary material and wrote and edited the text. The consultant also facilitated an evaluation and action-planning day involving all staff. The team devised an action plan, which was written into the management plan.

This process ensured that the staff had a good understanding of their part in delivering the plan and could then get together on an annual basis to review the action plan.

"The most useful part of the process was bringing all the staff together to work on the plan and giving them a chance to put forward ideas and opinions."



The criteria of the Green Flag Award do not prescribe facilities, but reflect local circumstances. Stoneleigh Park, Oldham (Green Flag Award winner)
Photography by Paul Ogden

CASE STUDY Oldham Metropolitan Borough Council

AN AUTHORITY THAT TAKES A STRATEGIC APPROACH TO ASSESSING ITS GREEN SPACE AGAINST THE GREEN FLAG AWARD CRITERIA.

The Parks and Countryside Service has been evolving its own house style of management plan, largely to satisfy the judging process of the Green Flag Award. Staff in the Service had experience of certain management planning approaches, which they had found useful but which they felt did not satisfy Green Flag Award requirements. Parks staff looked at other authorities that had succeeded in gaining the Green Flag Award to see how they had written their management plans – and two Parks staff are also Green Flag Award judges. The Service also had a Heritage Lottery Fund-based management plan, which they felt was far too detailed.

Depending on the type of site, the plan-writing team usually included the Head of Service and Operational Manager on parks sites or the Head Ranger and site-based management staff for countryside sites. A small number of staff took the lead in bringing together information, in keeping with the house style. Key stakeholders were then consulted and involved – such as ‘friends’ groups and front-line staff (gardeners, information centre staff, etc.), and specialists were brought in as necessary.



Community consultation can result in a more wide reaching plan. Burnham Beeches, London
Courtesy of Corporation of London

CASE STUDY Burnham Beeches, Buckinghamshire

A PLAN BY THE CORPORATION OF LONDON MAKES SURE IMPORTANT WOODLAND IS NOT ADVERSELY AFFECTED BY HIGH VISITOR NUMBERS.

Burnham Beeches is a small but important example of ancient woodland that attracts 500,000 visitors a year (see www.cityoflondon.gov.uk). In preparing the management plan, the Superintendent chose to consult on a number of specific issues. As he consulted on the issues, one at a time, he was surprised to find that the proposals that emerged from local residents and visitors to the park and the solutions that they suggested were often far more radical than he would have dared to suggest. He felt that in most cases consultation on issues resulted in much better-developed proposals that more effectively tackled problems. His decision to concentrate on individual issues, rather than the whole plan, got a more diverse cross-section of the local population involved and overall allowed a far greater number of people to express their opinions, at the same time preventing one or two vocal and highly opinionated individuals from dominating the process.

Sources of guidance and information

Guidance documents

Various documents are available that provide general or more specific advice about writing management plans. See references for details of these guides.

Other sources

There are also organisations that can offer access to academic research and specialist support and advice to managers of any green space that exhibits special features.

They include:

- government departments;
- national agencies;
- sector institutes;
- professional bodies;
- non-government organisations.

These organisations often publish guidance documents covering a wide range of topics that may be relevant to the development of your management plan.

The Internet can also be a useful source of information, but do remember that unless the information is from a known and trusted website, you may need to take some steps to validate the information.

The role of consultation

True consultation is not simply about telling people what you intend to do. It is a process of exchanging ideas and opinions and jointly developing the best possible options, solutions and proposals. This is why consultation should take place at an early stage in the development of the plan. Ideally, the proposals that appear in the first draft of the management plan will have emerged and been refined through some form of consultation.

If handled correctly, consultation can also be the beginning of long-term involvement and ownership.

By engaging in a genuine two-way dialogue with customers and local residents, you will acquire a far more accurate picture of what is expected, helping you to develop proposals and methods of delivering your services that the community and visitors to the site will welcome and support.

Consultation may add time to the early stages of the process of writing a management plan, but it can save time in the later stages by helping to ensure easier widespread acceptance of the draft plan and reducing the number of revisions needed between draft and final plan. If a draft plan meets a lot of opposition, revisions tend to be done in a hurry and some proposals that may have needed only minor amendments may suffer or be lost completely.

Working with everyone who has an interest in the park, at an early stage in the process, ensures that ideas can be developed in partnership. Good consultation often includes quite passionate exchanges of opinion, but it is an effective way of avoiding a full-scale battle or the formation of entrenched positions. By the time a draft management plan is ready, there should be few substantial areas of disagreement left to resolve, and the final consultation ought to be an opportunity to refine some minor aspects and promote the imminent release of the final version.



Top: Younger children may find it easier to show you what they like whilst teenagers may also be happy to write or talk about their ideas.
Courtesy of The Countryside Agency/ Doorstep Greens

Bottom: Developing ideas in partnership is not necessarily the easy option but will result in a more robust plan.
Courtesy of The Countryside Agency/ Doorstep Greens



Use all available mechanisms to consult including static information boards, as well as setting up new processes.
Courtesy of ICD Photography

What level of consultation is needed?

Attitudes to consultation vary greatly. Some very successful management plans looked at in compiling this guide were written with quite limited levels of consultation, others involved extensive consultation throughout the process.

It is worth noting that in all cases where the current management plan had been produced with little consultation, the people responsible for the site were intending to increase the level of consultation during the production of the replacement management plan.

The first management plan written for an area of green space is likely to concentrate on establishing a good basic understanding of the site and any current issues. Resulting action plans and proposals tend to be fairly conservative and less likely to produce radical change to the way the site is managed and services delivered. Relatively inexperienced management plan writers commonly limit the amount of consultation they undertake at this stage.

Later versions of the management plan are likely to be more ambitious and contain more radical proposals that have a more pronounced impact on the green space, the services provided and the visitor experience. The need now arises for a fairly high degree of consultation in the development of the management plan.

Where a management plan does not contain any radical proposals, the following people should be involved and draft proposals or copies of the management plan should be circulated for their comments, opinions and suggestions:

- all staff who work at the site;
- elected council members, senior officers, shareholders, a Board of Directors or Trustees;
- colleagues from other departments;
- existing user groups or community groups associated with the green space;
- tenants or people running businesses from the green space.

If the management plan is more ambitious and likely to have a more significant impact, you should be prepared to dedicate more time and effort to the consultation process. You could consider the following additional methods of consultation:

- Set up a project steering group with representatives from all interested groups and work with it to develop ideas, proposals and solutions.
- Make yourself available to anyone who has an interest in the site and the developing management plan by providing and promoting a contact address and telephone number.
- Provide drop-in exhibitions or displays so that from time to time people can check on progress.
- Periodically release information about the developing work through local newspapers, leaflets or newsletters.
- Set up focus groups to allow you to test and develop specific ideas.

The use of public meetings as part of the consultation process requires careful management. A number of smaller participatory meetings on specific aspects can often be far more productive than a single large meeting.

Remember that consultation is of little or no value unless you are willing to listen to the comments you receive and make changes to your proposals when valid concerns are raised. If you encounter what seems like unreasonable opposition to a proposal, you must also be willing to justify the proposal and explain your reasoning and motivation in more detail. If this does not convince objectors but you feel the proposal is too important to abandon, you will need to find out whether or not it has strong support from everyone else. If it does, you will then have to decide if you can keep the proposal in the management plan despite the opposition you have received.

You should continue to look for opportunities to convince others of potential benefits and to curtail opposition to the proposal.

The role of trust

The review of good practice in developing this guide revealed that the level of trust that exists between the people that look after the green space, those who use the park, and the community who live and work around it can have a significant impact on the format and style of the final plan.

In the absence of a good relationship, every issue, proposal and recommended action may need to be explained and justified at some length. The result can be a document that is cluttered up with technical information and statistics that would be better placed in an appendix, might be referred to only once or twice a year and the rest of the time will just get in the way, making the plan difficult to read, understand and use.

If there are high levels of trust and those people who are responsible for the park already have something of a track record for 'doing the right thing', the document might turn out to be a quite simple affair, even if it contains radical and far-reaching proposals.

The more you consult and so help to create a greater level of trust between the community and those responsible for looking after the site the less complicated and easier to implement the management plan will become.



A good relationship is essential to building trust of users, that change will benefit the community. Courtesy of The Countryside Agency/ Doorstep Greens

PART 2

CONTENT AND
STRUCTURE OF
THE PLAN

WHERE ARE
WE NOW?



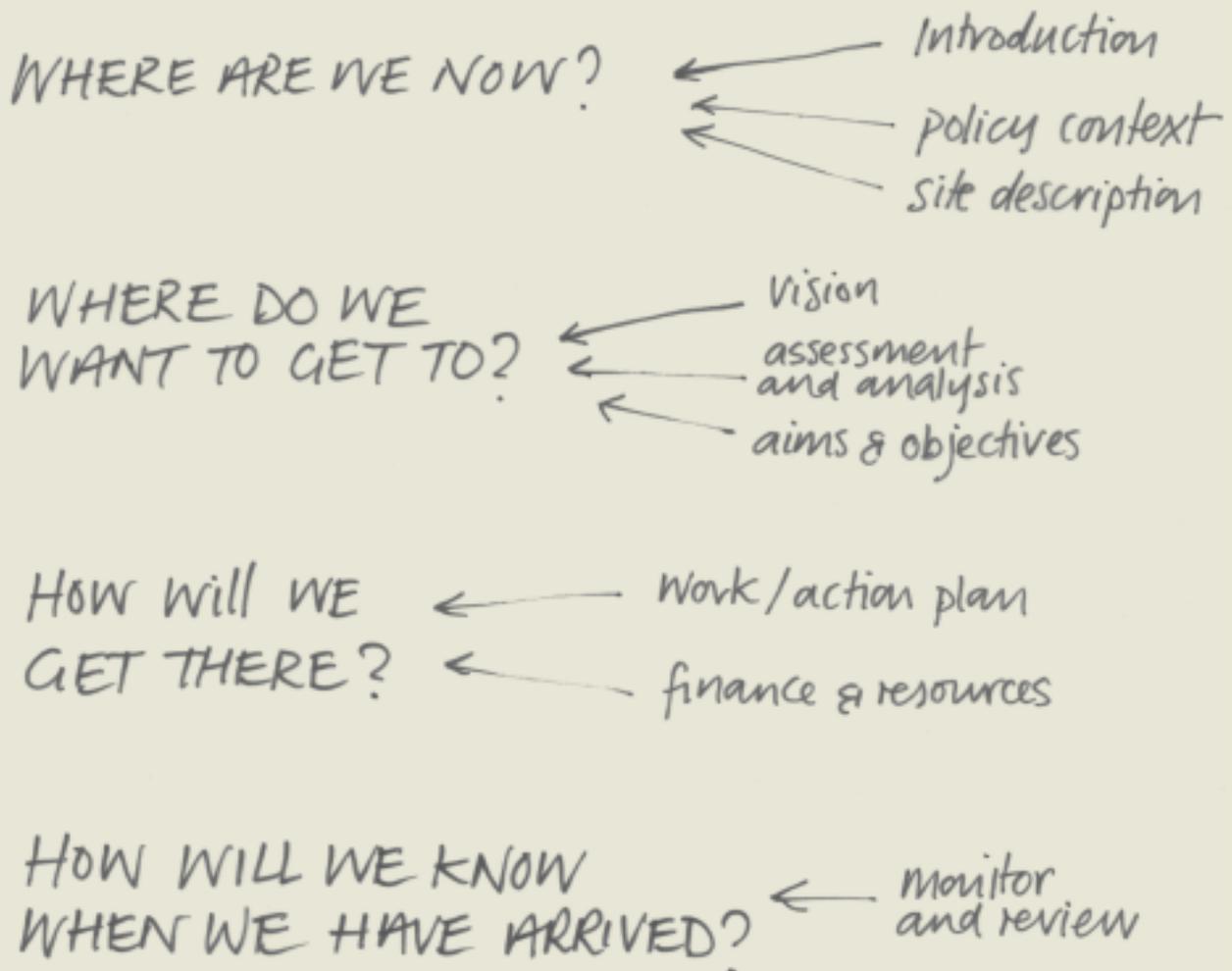
Content and structure of the plan

What information needs to be contained in the final management plan and how should that information be presented?

Broadly speaking, the information in the management plan should identify and describe:

- the current situation;
- ambitions and expectations, e.g. increased visitor numbers, improved facilities, greater biodiversity;
- a way of achieving or moving towards the desired future situation;
- methods of measuring progress.

These four fundamental questions are reflected in the structure that is suggested here.



Where are we now?



This section of the management plan describes the current situation. It is therefore largely driven by an audit process that allows examination of all aspects of the site and the circumstances in which services are delivered.

This is where you introduce the management plan to the reader and indicate what you are trying to achieve and the importance of the document. The introduction should include the following information:

- The name of the site.
- The name of the person responsible for the management plan.
- Information about who else was involved in producing the plan, including details about the team, if any, and any other individuals or organisations that contributed to the process.
- Brief details about any previous plan, including how successful it was, which objectives were not achieved and what issues and actions have carried over into the new plan.
- Relevant dates, such as when the plan was written, when it was approved and adopted and when it is due to be replaced.
- Brief details about any consultation that took place.
- Brief details about how the plan will be reviewed and monitored.
- A summary of your motivation for producing the plan and what you hope it will achieve.

Wider policy context

Local, regional and national strategies and policy statements that may impact on the delivery of park services are likely to be found in many areas of public service, including the following:

- Community
- Culture
- Planning
- Health
- Housing
- Environment
- Regeneration
- Transport
- Sustainable development
- Equality of opportunity
- Education

This section of the management plan will need to:

- identify strategies and policy statements that potentially impact on the management plan;
- highlight the relevant aims and objectives within these strategies;
- provide a clear statement about how the management plan will support and contribute to the relevant aims and objectives;
- identify any legal constraints that may impact on the management plan.



Top: The current situation may define a site before funding is achieved or an improvement programme is begun.
Courtesy of The Countryside Agency/ Doorstep Greens

Bottom: The reader will want to know what you are trying to achieve and what is your motivation behind it.
Courtesy of ICD photography

Writers of management plans need to familiarise themselves with the legislative and strategic policy framework of local, regional and national government, to ensure internal corporate support, legal and statutory compliance and support from external bodies.

Internal corporate support

A management plan that contains proposals that directly contradict the objectives held in corporate strategies will require a lot of justification, and even so it is unlikely to receive approval, from the organisation responsible for the green space, for them to be implemented.

Corporate strategies and policies describe the organisation's priority aims and objectives and are applied across the organisation's entire area of responsibility. They state the aspirations of achievement for each major area of service and how the local authority intends to go about meeting the aspirations. All the smaller areas of service are expected to support and contribute to the corporate strategies and policies through their own service-wide strategies and policies.

The most relevant of these corporate strategies will be the green space strategy. This should provide an overview of the entire service area and how green spaces interrelate.

It will also describe service priorities and how the organisation expects park services to be delivered. If there is a green space strategy in place, proposals contained in the management plan will need to support and reinforce the strategy, and if they don't a well-reasoned justification will need to be provided.

Green Space Strategies – a good practice guide, by CABE Space, lays out the process of preparing a green space strategy.

There is another good reason for familiarising yourself with the contents of corporate strategies and policies. Achieving their aims and objectives is highly important to the local authority and has a direct influence on the allocation of resources, including financial. If you can show that the proposals in the management plan will directly and positively support the authority's aims or strategies, your chances of receiving funding will be greatly increased.

It would be beneficial to include a foreword by the leader of the council or the executive member with responsibility for parks and green spaces. After all the local authority is an elected body that has ownership of the park and is responsible to its electorate for its stewardship.

It also pays to familiarise yourself with the service-wide plans of other departments. If you can show that your proposals may assist them to achieve their aims and objectives, they may be willing to help implement your proposal and may even have some financial resources available to put towards it.

In your review of the corporate and service-wide strategies and policies, you may discover proposals that negatively impact on the site you are responsible for. For example, the local transport strategy may contain a proposal to build a new road close to the site, generating substantial noise pollution and threatening to reduce the pleasure visitors get from the site. You should identify the potential conflict in this section of the management plan and then go on to consider the extent and possible impact of the problem in the analysis and assessment section of the plan. If the analysis shows that the problem is potentially serious and is therefore a priority area of concern, the approach and intention to resolve the problem can be included in the aims and objectives, and the precise actions needed to minimise the impact of the new road can be included in the work plan.



Top: A green space strategy will include a range of types of space such as waterways. Abbey Park and Grounds, Leicester (Green Flag Award winner)
Photography by Dave Harris

Middle: Corporate aspirations will include reaching communities.
Courtesy of The Countryside Agency/
Doorstep Greens



Bottom: External organisations will have representation in your area and a plan should include complimentary objectives to their projects.
Courtesy of Groundwork UK

Legal compliance

There are a number of legal provisions and statutory obligations that affect the delivery of park services that need to be duly considered and if necessary reflected in the management plan. These include:

- Statutory Instrument 2004 No.118 Prescribed Descriptions (England) Order 2004 (established statutory crime and disorder strategies);
- Local Government Acts 1972, 1999 (established Best Value Authorities) and 2000 (established promotion of economic, social or environmental well-being);
- Local Government and Rating Act 1997;
- Dogs (Fouling of Land) Act 1996;
- Environmental Protection Act 1990;
- Litter Act 1983;
- Parish Councils and Burials Authorities (Miscellaneous Provisions) Act 1970;
- Public Health Acts 1848 to 1875;
- Smallholdings and Allotments Act 1908;
- Open Spaces Act 1906;
- Enclosure Act 1845.

The provisions of these Acts enable local authorities to hold land, provide services, enforce byelaws and in some cases impose fines. Further details can be obtained from www.legislation.hmsso.gov.uk.

Additionally, as statutory obligations, Best Value legislation and Comprehensive Performance Assessment (CPA) provide an assessment of local authority performance in delivering services and meeting appropriate standards. By demonstrating good practice in service delivery, the site management plan can contribute to achieving favourable Best Value and CPA assessments.

Any major change to buildings, listed structures or use of land is likely to require consent from the planning authority. An effective working knowledge of planning regulations and supplementary planning guidance may assist you to secure valuable financial contributions from developers and more accurately assess local community needs.

Support from external bodies

The aims and objectives of external organisations, including national Government and the national and regional bodies that it supports, need to be considered in the management plan.

Through various government departments, agencies and organisations such as English Heritage, English Nature, CABE Space and Groundwork, national initiatives, strategies and approaches are being filtered down through the regions and out to locally based service providers.

Some of these initiatives may provide financial support for improving parks and green spaces, and the chances of attracting support from these initiatives are likely to be improved by a management plan that includes complementary aims and objectives.

YOU WILL NEED TO:

- review the aims, objectives and policies of these organisations;
- assess their potential relevance and impact on service delivery;
- where appropriate to site management, develop aims and objectives to maximise their potential benefit or minimise the potential harm;
- identify the work required to deliver these aims and objectives and build these into your work plan.



Top: The management plan will contain a summary of activities, including major events that will require extra service provision. Danson Park, Bexley (Green Flag Award winner) Courtesy of Steve Hicky & A Leyshon

Bottom: Stakeholders may include special user groups, it is important to record these and to involve them in future planning. Ashton Park, West Kirby (Green Flag Award winner) Photography by Dave Wade

Site description and information base

The information in this section should remain focused on the current situation. It is helpful to provide an illustration, map or sketch of the site. This description sets the scene for the reader and should be presented either in the form of two or three brief paragraphs or a set of headings such as the following:

- Name of the site and any additional names by which it might be known locally;
- Address or map reference;
- Overall size of the site, broken down into its various compartments if this helps the reader understand the site better;
- Summary of any really significant features, which includes the natural physical landscape, the designed landscape and significant built structures;
- Tenure, or legal basis on which the organisation owns or holds responsibility for the green space;
- Summary of main uses, recreational facilities, visitor attractions and activities;
- Who uses the site, where they come from, patterns of use and behaviour;
- An assessment of the cultural and aesthetic value;
- Details about any stakeholders associated with the site, such as user groups, tenants, franchises and private business operators;
- Details about access to the site and barriers to access, which may include information about public transport, car parking and pedestrian and cycle routes. Access points should be described as well as accessibility to within the site for those with disability/mobility impairments;
- Summary of the site's heritage and history;
- Details about current management arrangements, policies and procedures, and a summary of the management history, such as who managed the site in the past and any issues arising from previous management approaches;
- Environmental and ecological concerns or attitudes;
- The resources currently available to conserve, maintain and improve the site, including any known constraints;
- Marketing information, activities and approach;
- Summary of the *known* issues or challenges.

Having provided a basic overview of the green space and circumstances affecting service delivery, this section of the management plan should go on to provide the more detailed information that will be used to inform decision-making and the development of recommendations and actions.

A management plan may be in use for a considerable time, and its implementation can have major implications for the way the site is run. If it is to be successful in assisting managers to conserve, manage, maintain and improve the site, it must be based on solid and reliable information.

There is an opportunity here to highlight any shortcomings or concerns about the information base, identify the need to obtain additional information and describe how it will be obtained, and describe how decisions and recommendations have been developed in the absence of adequate information.

The most convincing form of information, especially if it is required to support a contentious proposal, is probably quantitative information. Quantitative information consists of 'hard', measurable data – such as numbers (how many?), size (how big?) and frequency (how often?). Provided the methods used to collect this information are robust and capable of standing scrutiny, this information can be presented as objective facts.

Qualitative information can also be presented. This is based more on observation and a subjective view or opinion about an issue. A statement such as 'most visitors enter through the main entrance' is qualitative unless it is accompanied by statistical data based on counting visitors at each entrance. Although it is perfectly permissible to include such information, if it is to convince the reader, it will ideally be supported by some kind of evidence, as in the statement, 'park rangers working on site have reported that most visitors enter through the main entrance.'

At some parks and green spaces information is collected as a matter of routine, to inform day-to-day management of the site and to measure progress against specified targets. Any site that operates in this way has a head start in terms of developing a management plan, because the process of collecting information will have helped to identify concerns and provide managers with a better understanding of the issues. At other sites, where information is not routinely gathered, the process of collecting information should:

- provide an objective audit of the current situation;
- validate known issues and concerns;
- identify issues and concerns that have not previously been considered;
- test and validate areas of concern that have been identified as potential issues, but never before substantiated or supported by statistical evidence.

The level of information required will vary significantly from site to site depending on the size, type and complexity of the green space and the variety of services and activities offered. For a simple site with just one primary function and very few facilities, the information requirement will be very limited. A large, complex site, which caters for a wide variety of potentially conflicting needs and provides a broad and diverse range of services, will need a substantial information base if the people responsible for the site are to identify and resolve all of the pertinent issues.

As the person responsible for writing the management plan, you should consider what existing information is available and valid, and what additional information is needed or would be useful. You will then need to apportion an appropriate amount of staff or volunteer time or money to pay for the data collection, and build this in to your plan development timetable. You should also decide which areas of interest or concern you feel you can competently tackle without additional information, and progress with these areas in the meantime.

The information base should cover three main areas of concern:

- *the physical aspects of the park or green space;*
- *the surrounding community and the visitors who use the park or green space, as well as non-users;*
- *the organisation that looks after the park or green space, the structure, the team and the available resources.*



Top: The site description will include a summary of activities and uses of the site.
Courtesy of ICD Photography

Bottom: Special considerations such as geological features, and resources available to conserve them, will be part of the information base.
University Park, Nottingham
(Green Flag Award winner)
Photography by Ian Cooke

Physical aspects of the park or green space

Information relating to the physical attributes of the park or green space could include the following:

- the natural landscape features that exist on the site such as geology, water, soil types, topology and land types (woodland, heathland, etc.);
- the designed or manmade landscapes features that exist on the site, such as paths, buildings and structures, water features, sports pitches and heritage landscapes, and their condition, trend in condition, life expectancy and investment needs;
- the ecology of the site, flora, fauna, avifauna and aquacultures;
- archaeological features.

Community, visitors and non-users

The vast majority of parks and green spaces were created and continue to exist because of the benefits they provide to people in general and, more specifically, the local community.

These benefits may be:

recreational, cultural, social or psychological and physiological, relating to exposure to and interaction with nature.

Communities are often very diverse, containing many different ethnic, social and cultural groups. The green space needs of the local population will be as diverse as the community itself. While adhering to the principle of conserving or enhancing the character and valuable features of the green space, the management plan should recognise and try to accommodate the diversity and range of community needs.

The community and visitor information base could include the following:

- demographic information on the surrounding community, age, gender and ethnicity;
- socio-economic information on the surrounding community, employment and income, education, housing, transport and health circumstances;
- number of visitors;
- frequency of visits;
- duration of visits;
- how they arrive at the site;
- where they come from;
- patterns of use (where do they go and what do they do when on site?);
- demographic and socio-economic comparison of visitors against the wider local community;
- the range of visitor facilities and services, such as toilets, benches, pavilions, sports, play and recreational facilities, cafes, car parking, gift shops, way-marked trails and interpretation, events and activities;
- the condition, trend in condition, life expectancy and investment needs for the range of visitor facilities;
- satisfaction levels both overall and for each area of service;
- additional services and facilities required by customers;
- which members of the community are not adequately represented among the visitors;
- why non-users are not visiting the site;
- what non-users might require in order for them to visit and make use of the site.

Management

The attitude and approach of those who manage the site and those who maintain it have a major impact on the site itself and the experiences of visitors. The creation of the management plan provides an opportunity to examine the way in which the site is currently managed and maintained.

The information base could include answers to the following:

- How is responsibility divided up, who is responsible for each area of service?
- How many staff are employed and what are their functions?
- How are decisions taken?
- What skills, qualifications, knowledge and experience do the workforce have?
- Are there any known skills gaps that are constraining service delivery?
- What responsibility exists among the other stakeholders?
- What is the management's relationship with each stakeholder?
- How are financial resources, income and expenditure structured?
- Is there potential for capital investment?
- What policies and procedures enable or constrain site management?
- What are the standards that management are currently trying to achieve, and how does current performance match up to desired standards?
- What are the current aims and objectives, what level of success has been achieved, and how is this measured?
- Is any other support available?
- Are there any existing partnerships?



Visitor facilities should be well-maintained and meet users' needs. A sense of safety may be provided by staffing presence.
Courtesy of ICD photography

PART 2

CONTENT AND
STRUCTURE OF
THE PLAN

WHERE DO WE
WANT TO GET TO?



Where do we want to get to?

The next section of the management plan

Where do we want to get to?

... should describe a vision for the green space that represents community and management's aspirations, uses assessment and analysis to build on the information base and sets clear aims and objectives.

Vision

"To provide a park of high quality for the enjoyment of the people of Taunton and the wider community of Taunton Deane."

Vision for Vivary Park by Taunton Deane Borough Council

"The vision for Southcrest Wood is one of a thriving community woodland at the heart of the local community."

Vision for Southcrest Wood by Redditch Borough Council

"Our vision of Brownhill Nature Garden is to promote the area as an example of sensory nature gardening excellence, with good recreational opportunities, for the enjoyment of residents and visitors."

Vision for Brownhill Nature Garden by Oldham Metropolitan Borough Council

The use of the term 'vision' represents relatively new thinking in this context, but it is a useful addition to management planning, which is a process that entails developing ideas, considering issues and making compromises according to the availability of the resources needed to implement the management plan. In the case of parks and green spaces, adequate resources of all kinds are difficult to find and a lot of compromise may be necessary. The result is often that aims and objectives are not achieved all at once but stage by stage and over a longer time than one might wish.

In these circumstances it is hard to stay focused on the ideal longer-term outcomes; excessive constraints and difficult obstacles can over the years erode a good plan. Many of the green spaces for which management plans are developed have been in existence for centuries, certainly for at least one hundred years, and even ten-year management plans represent a short term compared to the life expectancy of the green space.

A vision provides a valuable reminder of the longevity of the place and at the same time an ideal view of the future of the site. While the vision must remain realistic, it should also accommodate optimism and hope, encouraging support and commitment that go beyond any current difficulties and constraints, as well as beyond the immediate aims and objectives. It should represent potential attainment underpinned by belief in the true value of the green space.

Vision statements vary in length. Some are brief, perhaps only one or two sentences, others may run to many paragraphs and several pages. A good vision statement can be a powerful tool for generating increased interest in the green space and encouraging increased involvement and support from influential parties such as the community, senior managers, elected members, trustees, visitors, staff and grant-giving bodies.



The vision for a green space needs to reflect the long-term nature of green space and include aspiration whilst having a realistic basis.

Royal Victoria Park, Bath
(Green Flag Award winner)
Courtesy of Glenn Humphreys
& Richard Baulch-Collett

Analysis and assessment

The audit process undertaken to inform the management plan should have produced some definition of the main issues and areas of concern, the most valuable features and aspects of service delivery. The findings of the site audit can now be set against the statistical and contextual information collected, the operational constraints that have been identified and the wider policy context in which services are delivered and management of the green space operates.

This stage of the process requires you to determine whether or not the level of significance attached to any particular aspect of the green space or service delivery is currently at the right level, or whether it should be increased or decreased, with a resulting modification of management approach.

Some of the potential thematic headings are:

- Ecology;
- Sport and recreation;
- Heritage;
- Landscape;
- Management;
- Visitor and community needs.

The analysis and assessment should assist managers to:

- determine the significance of each area of concern or interest;
- identify the best options and approaches for resolving the issues and concerns;
- determine which are the most valuable features and aspects of service;
- identify the best options and approaches for conserving, managing, maintaining or enhancing these features and aspects of service;
- assess performance and capacity against desired management standards and identify any shortcomings and gaps;
- develop plans for closing any shortcomings and gaps;
- develop plans for improving the skills base;
- identify any other constraints that might prevent or hamper delivery;
- work out strategies for overcoming these constraints;
- prioritise issues for management.

If the analysis reveals that the site has a particular significance under one or more of the above headings, you will need to ensure that this significance is reflected in the vision, aims and objectives and resulting work plan, and to indicate clearly how the significance will be safeguarded, altered, developed and/or improved.



SWOT analysis

The use of SWOT analysis is a well-established general management technique. The term SWOT stands for:

- **STRENGTHS**
- **WEAKNESSES**
- **OPPORTUNITIES**
- **THREATS**

The SWOT analysis can first be applied at a 'broad-brush' level across the whole site, which will immediately start to help you define the most important features of the site.

Once you identify a site's strengths, you will probably also be identifying an area of established importance. For example, a strength of the site may be the presence of a number of historic architectural features, which immediately suggests that heritage may be an aspect of the site that has particular significance. Another might be the presence of a rare or vulnerable species, indicating that ecology may be a management priority.

By the same token, when you identify a weakness, you will probably be looking at an area that is not currently considered significant or important. For example, a lack of diversity in the number of species found is likely to indicate that the site is of low ecological significance.

Often the most important and valuable features of the green space are also the most vulnerable and fragile, and it is particularly important to find opportunities to make these less vulnerable and ways to fend off threats that may further endanger them.

The SWOT analysis can then be applied in greater detail for each of the thematic headings suggested above.

Left: Presence of rare or vulnerable species will guide setting of conservation and management priorities.
Epping Forest, London
(Green Heritage Award winner)
Courtesy of Dave Woodfall & Clive Totman

Right: The Green Flag Award is the national standard for quality parks and green spaces.
Recreation Ground, Stratford-upon-Avon
Courtesy of Ken Wiggett and Ian Greenall

Far right: Provision standards should be linked to local needs.
Belfairs Park and Nature Reserve,
Southend-on-Sea Borough
(Green Flag Award winner)
Courtesy of Southend-on-Sea Borough Council

Designations

Clearly, specific designations will be a good indication of a current level of significance in a particular area. For example, a space designated as a Site of Special Scientific Interest (SSSI) must have high ecological significance; an Area of Outstanding Natural Beauty (AONB) would have high landscape significance; and a Scheduled Ancient Monument (SAM) designation would be significant in terms of heritage.

The use of Green Flag Award criteria

Application of the Green Flag Award scheme criteria can provide an excellent framework for a site assessment. The criteria touch on all areas of green space management found within a typical site. Although the Green Flag Award uses its own trained judges to assess applicant sites, the technique is relatively easy to apply as a self-assessment tool. The assessment criteria used by the Green Flag Award scheme focuses on the following themes:

- *A welcoming place;*
- *Healthy, safe and secure;*
- *Well maintained and clean;*
- *Sustainability;*
- *Conservation and heritage;*
- *Community involvement;*
- *Marketing;*
- *Management.*

The manual of the Green Flag Award scheme entitled 'Raising the Standard' provides guidance on the specific management planning requirements of the Award application, and in addition provides an assessment checklist that can be used as described above, see www.greenflagaward.org.uk.



Planning Policy Guidance (PPG) 17

It should be noted that Planning Policy Guidance Note 17 (PPG17) promotes a framework for open space.⁵ This identifies the need to establish standards for quantity and quality. These are ideally maintained through proactive management regimes and so the role of the management plan is to ensure that the long term quality of parks and green spaces is maintained.

The companion guide to Planning Policy Guidance Note 17 (PPG17), 'Assessing Needs and Opportunities',⁶ provides a detailed model for assessing the green space needs of the wider community living and working around the green space. Areas covered by the companion guide include:

- *Undertaking local assessments;*
- *Auditing local provision;*
- *Setting provision standards.*

Although much of the guidance is directed towards the development of green space strategies, it also gives valuable advice on the development of individual management plans.

The guidance places great emphasis on the accessibility of the green space, assessing the needs of diverse communities and the development of standards that are informed by community needs, and is seen by government as a key driver in proper management of open spaces.

Specialist techniques

In some cases, where the initial audit and analysis have indicated that the site may have a particular local, regional or national significance, under one of the thematic headings listed earlier, it will probably be appropriate to carry out a more thorough assessment using more specialist techniques.

A number of more specialist guidance documents offer useful and detailed advice on these techniques. See other relevant reading, on page 47, for a list of these specialist guides.

Measuring success

If an aspect of the green space is considered highly significant or if there is a desire to increase its significance, it is important to develop indicators that will accurately assess how well your approach to maintaining or improving the significance is working. The indicators must relate to the right questions and also provide you with an early warning if the approach is failing. For example, on a site where ecology is important, you may be trying to increase the population of a particular species. The question that needs to be asked is, 'what does this species need in order to prosper?'. Your indicators are then likely to focus on such things as the right habitat and food. Your early warnings should also relate to a decline in suitable habitat and food sources rather than the number of that particular species found on site on the day you counted them.

Remember, the decision to decrease, maintain or increase the significance of any particular aspect of the green space must be reflected in the aims and objectives and the resulting work plan.

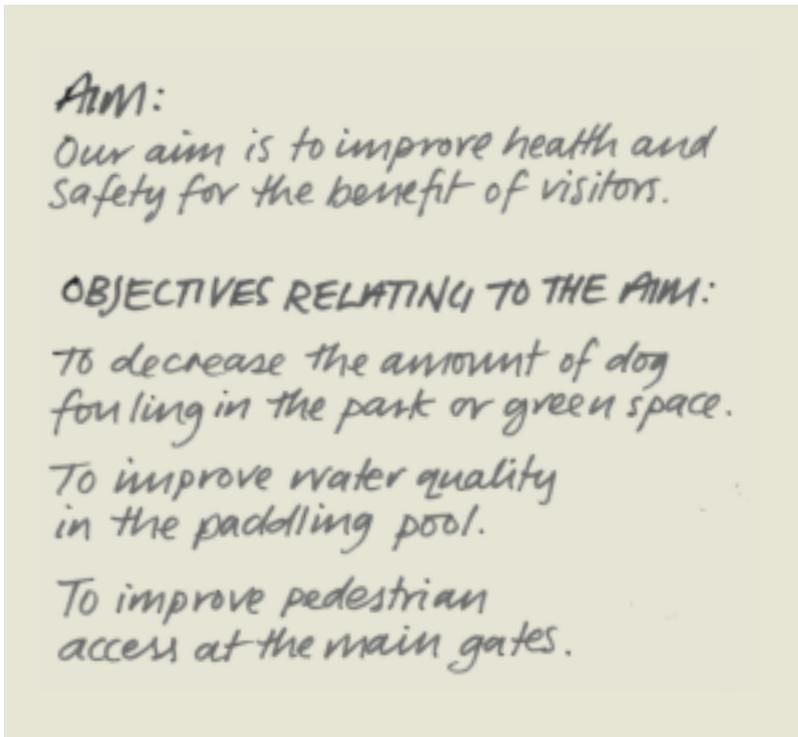


Aims and Objectives

Aims are not the same as objectives, although the objectives do arise from the aims. Aims are fairly general statements of intent; they provide a framework to describe roughly the direction that site management should follow. They focus on outcomes rather than more specific outputs.

Objectives underpin the aims, and describe more specifically how the people responsible for the site intend to achieve the aims. It is likely that each aim will give rise to several objectives.

Here is an example of the difference between aims and objectives:



It is worth mentioning at this point that the objectives do not have to define each component of work that is required. This is covered in more detail in the work plan section of this guidance, which will throw further light on this example.

The aims and objectives represent the areas of priority for whoever is responsible for the green space. They drive future management of the site and most directly influence the allocation of valuable resources. The aims and objectives should be substantially informed by the needs and aspirations of visitors and the wider community. If time, effort and money are going to be spent on the site, they should directly relate to one or more of the aims and objectives.

Periodic assessments of management's performance must focus on their success in achieving the stated aims and objectives. It is therefore important that if circumstances change and a previously identified aim or objective becomes redundant or in need of modification, the management plan is revised to reflect this change. If this is not done, the periodic assessments will be worthless and management may attract criticism that is based on out of date information.

When you come to the practical writing of a management plan, it may be worth considering producing a draft set of aims and objectives fairly early on. These will reflect the known concerns of management and focus largely on issues and areas of conflict that have already been identified or have been forecast based on existing knowledge. As investigations continue and you accumulate and assess more supporting information, the draft aims and objectives can be revised and updated.

Some of the case studies reviewed made use of a technique that involved 'ideal' aims and objectives. Here, management identify what they would really like to achieve as the 'ideal'. As each ideal aim or objective is considered further, and issues such as a lack of adequate resources are identified, a modified and achievable version of the aim or objective is then created. This modified version replaces the original 'ideal' only for the lifespan of the management plan. The original ideal aim or objective remains as a longer-term aspiration. In some ways, these 'ideals' perform a similar function to the 'vision' discussed earlier, and writers of management plans need to consider which suits their purpose better. You may want to refer to both the 'vision' and the 'ideal', but take care that they do not simply say the same thing in two different ways.

It is also worth considering how aims and objectives will be linked in to the work plan by setting SMART targets, i.e. targets that are:

SPECIFIC
MEASURABLE
ACHIEVABLE
REALISTIC
TIME-RELATED

This will help when monitoring annual action plans as it will be clear what you were trying to achieve.



Setting priorities for maintenance provides a rationale for not doing other works, that will be understood by the community.
Photography by Peter Neale

PART 2

CONTENT AND
STRUCTURE OF
THE PLAN

HOW WILL WE
GET THERE?



How will we get there?

The next section of the management plan,

How will we get there?

identifies how the aims and objectives will specifically be achieved.

Work plan

The work plan follows on from the setting of aims and objectives to define more specifically the elements of work that are required to achieve each objective and therefore each aim. The work plan should be described for each year of the management plan, so as to make the plan easier both to understand and to implement.

The work plan should generally reflect management's priorities, the highest priority work being set for completion in year one.

The example given previously of aims and objectives based on health and safety issues can now be continued to illustrate how the work plan relates to individual objectives.

Objective 1: To decrease the amount of dog fouling in the park or green space.

Work plan items that relate to this objective might include the following:



Local environmental quality is a top consideration of the public
Courtesy of ENCAMS

1. Set up a dog-walkers user group, obtain feedback from the group and enlist their support.
2. Design and produce a leaflet that explains the hazards associated with dog fouling and encourages responsible dog ownership.
3. Include in the leaflet information about dog fouling legislation and its potential enforcement.
4. Check the validity of current byelaws and amend as necessary.
5. Distribute leaflets to dog-walkers and make them readily available at established outlets.
6. Train staff to discuss the issues face to face with dog-walkers.
7. Develop a local media campaign.

The work plan should identify the following information for each component of work:

- who is responsible for completing the work;
- when the work should be completed;
- the resources that are required to complete the work (staff time, money, materials, information, training, etc.);
- a clear reference to the objective to which the work relates;
- where appropriate, a clear reference to the geographic location of the work;
- a clear reference to any other individual or organisation that needs to be involved in the work, such as a consultative or user group;
- the outputs required to consider the work complete;
- where appropriate, the method to be used to determine that the work has been completed to the required standard.

Finance

In the first stage of the management plan, you should have made an assessment of the financial resources that are currently available to spend on the park or green space. This assessment should have included a breakdown of current revenue budgets and expenditure, any income generation that occurs and the current level of capital expenditure.

The challenge that now faces you is to determine whether or not current financial resources are enough to achieve the aims and objectives and to complete the tasks identified in the work plan. Where the work is largely to be completed by existing members of staff or volunteers, it is likely that the majority of the calculation will be based on whether or not there is a sufficient staff resource currently available.

Where the work is to be completed under a maintenance contract, the calculation will need to be based on unit cost. The timetable for completing the management plan should include sufficient time to negotiate costs with the contractor. Failure to allow sufficient time may compromise your negotiating position.



The community may wish to raise funds for specific activities, features or even long-term care
Photography by Dinah Kenyon

Many action plans are likely to identify a requirement for some degree of capital expenditure. Within local authorities, it is increasingly likely that the amount of capital money available to spend on the green space is not a fixed sum from one year to the next, making it difficult to predict whether or not there will be sufficient capital funding available to complete the work required to achieve the aims and objectives. If this situation applies to the area of green space for which you are responsible, you will need to base your prediction of the likely level of capital money on the following considerations:

- capital expenditure over the last five years and the trend in capital expenditure (whether it is going up or down);
- feedback from senior managers, elected members and, where appropriate, trustees or treasurers.

Any shortfall in capital money will need to be communicated to decision makers to make them aware of the deficit in service and conservation terms which will result. You will need to consider the options available to you to acquire new capital money and close the funding gap. You might consider the following options, currently available at time of going to press:

- applications for national grant schemes such as the Heritage Lottery Fund (HLF) Public Parks Initiative or the New Opportunities Fund (NOF);
- developing funding proposals for nationally and regionally controlled schemes and initiatives such as New Deal, Business Improvement Districts (BIDs), Neighbourhood Renewal or Liveability initiatives;
- bidding for locally distributed money for projects and initiatives such as crime reduction schemes;
- bidding for local authority capital funds;
- section 106 agreements and planning gain agreements negotiated through the Local Planning Authority from any commercial developers who may be active near the green space;
- the sale of assets, where the sale of the asset will not damage or devalue the green space itself and the benefits gained outweigh any potential loss;
- increased income generation, from successful marketing of facilities, the introduction of new charges, increases to existing charges or the introduction of new facilities, products or services where a market demand has been identified;
- new business partners requiring a franchise or lease agreement;
- local business sponsorship or benefactors;
- launching a campaign and public appeal, enlisting the help of local individuals, business organisations, schools and youth clubs, community groups and volunteers.

The acquisition of capital money increasingly relies on successfully bidding or applying for money, in competition with other worthy proposals.

To be successful, any proposal will need to be well considered, well presented and ideally have some advantage over the others.

The existence of a management plan will help to reassure the grant-awarding organisation that you have the capability to manage the site and deliver the project. Securing an award such as a Green Flag Award will provide even more reassurance and may provide you with the competitive advantage you need.



PART 2
CONTENT AND
STRUCTURE OF
THE PLAN

HOW WILL WE KNOW
WHEN WE HAVE
ARRIVED?

How will we know when we have arrived?

This section sets out ideas on tracking progress and checking that, after all the effort and time you have put in, you have got to the 'right' place.

Monitoring and review



Maintaining dialogue with key officers and stakeholders will ensure the project remains on the right track.
Courtesy of The Countryside Agency/
Doorstep Greens

Monitoring and review allow you to keep the process of management planning alive after the document is written. They also give you the opportunity to keep dialogue going, to continue to involve key officers and stakeholders and to celebrate success as you achieve your aims.

As mentioned earlier, it is useful to think about which sections of the plan will need updating and when. Much of the site description and policy context in the first section of the plan are unlikely to change from year to year for most sites. Similarly, the second section is also likely to be fairly static but will need to be reflected upon annually. It is the last part that will probably be the most dynamic section of the plan if it is being used effectively.

By setting out a work plan clearly linked to your objectives with measurable targets, it should be relatively straightforward to see where you have and have not succeeded in delivering change on the ground.

What is important is to set up a process and timetable for monitoring and to ensure that one person is responsible for leading on this, preferably the author of the plan or the site manager. The management plan needs to identify clearly which components of the plan will be updated and when.

A useful way to approach this section is for the team involved in producing the management plan to continue to meet quarterly or bi-annually to oversee the delivery of the work plan. Then it will be easy to produce next year's work plan and also review your objectives. The management plan should set out who is in the team, how often they will meet and how annual performance will be reported.

Assuming that the management plan has gone through some approval and adoption process by the local authority and its partners, significant changes need to be agreed with stakeholders and documented. Other changes mentioned above will only affect annual service plans so will not change the thrust of the management plan. Knowing what is for managers to change and what needs wider political approval is essential.

Earlier in this guide it was suggested that the Green Flag Award criteria could be used as a means of deriving actions for the work plan. As well as performing this very useful function, they can also be used to measure performance management. By scoring the desk and field criteria, a baseline figure is arrived at for the site, against which progress can be measured annually.

Other items that could be updated annually are:

- User surveys and community consultation.
Again, these can be used as a performance management tool. You can ask people to rate the quality of the site, how satisfied they are with the site or its facilities and what additional improvements they would like to see made. All this information can help you check that you are on the right track from the most important point of view – that of the end user. It also presents an opportunity for the site 'friends' group to assist with user surveys, and even be involved in monitoring progress of the work plan.
- Finances.
Although you may have put together a cash-flow forecast for the next three or five years, budgets can be changed annually and the plan needs to be flexible enough to respond to changing circumstances.

Finally, there needs to be a precise time period for review and a process described.

CASE STUDY Lickey Hills Country Park

*BIRMINGHAM CITY
COUNCIL APPLIES
A PERFORMANCE
MANAGEMENT
APPROACH TO ITS
AWARD-WINNING
COUNTRY PARK*



At Lickey Hills, the management team has taken the idea of performance management one step further and has produced an annual performance plan (APMP). In essence, the management plan does not contain a detailed five-year action plan - it has objectives but these are not translated into SMART objectives. The APMP does this and ties work into the corporate objectives (which can change annually - important to remember when updating or revising a plan). This clearly identifies targets, outputs, responsibility and resource and training implications. The plan has defended the site against cuts - and site staff are now consulted on service wide cuts. It has changed the mindset in senior management to allow these staff the autonomy to develop their site.

Tying into corporate objectives ensures that the value of green space is understood at a senior level. Lickey Hills Country Park, Birmingham (Green Flag Award winner)
Courtesy of Ranger Service, Birmingham City Council

"Since the first plan was written in 1992, initiatives such as Investors in People, Best Value Improvement Plans and Business Planning Groups have led to the Division adopting a more structured approach. The Parks Division has now had to become more business like and the Lickey Hills plan is a good example of how this process is delivered or translated at site level."

Head Ranger, Lickey Hills Country Park



CASE STUDY Wellington Park,
Wellington, Somerset

TAUNTON
DEANE BOROUGH
COUNCIL USES A
MANAGEMENT
PLAN TO PLOT
IMPROVEMENTS
AND ACHIEVE THE
GREEN FLAG
AWARD.

Good planning is reflected in winning standards at Wellington Park, Wellington, Somerset (Green Flag Award winner)
Courtesy of Steve Cuthill and Taunton Deane Borough Council

The site-based team at Wellington Park carried out an evaluation based on the Green Flag Award as part of the process of producing the management plan. Their first in-house assessment against the criteria failed the site and identified key areas for improvement. Less than a year later they won the Award.

As it was the first management plan the authority had written, it also represented a pilot to see how service areas could be brought together in a holistic approach. The plan process has also been replicated at a second site and staff have shown a willingness to get involved again and work together as a team.

"The ideal is to nominate one site manager and get the budgets all released to his/her control during the process so that when the plan goes live, this is not an issue and there is no need to ask others for money to do routine tasks."

Taunton Deane Borough Council Officer

Annex A: Heritage Lottery Fund management planning requirements

Applicants to the Heritage Lottery Fund (HLF) Public Parks Initiative (PPI) are required to produce two separate management plans of different types:

Conservation management plans

'A conservation management plan is a document that helps you to care for a heritage asset or group of assets. It explains why an asset is significant and how that significance will be retained in any future development, use, alteration, management or repair. It is usually a detailed document, prepared by a specialist, normally in consultation with different stakeholders.'

This plan differs from traditional management plans because it is explicitly driven by significance, and how that will be managed.

'A conservation management plan or statement differs from any other kinds of plans because it focuses on the needs of the heritage asset rather than your business needs. At the centre of the conservation planning process, is understanding the asset's significance – why it has value to people.'

The conservation management plan is produced prior to commencement of any works and focuses primarily on the restoration requirements and capital improvement of a site. It provides the detailed information required to justify and prove the need for investment.

In order for applicants to demonstrate that they have an adequate understanding of the asset, they are expected to include the following information:

- A description of each of the different types of heritage that make up the asset;
- An analysis of how the asset has changed through time;
- How the asset is currently managed;
- How people use the asset today;
- Any gaps in knowledge about it.⁷

Integral to a conservation management plan is an assessment and understanding of the heritage significance of the place and a heritage 'impact assessment'. The heritage impact assessment should answer the following five questions:

- What is the need for the new work?
- What are the benefits of the new work?
- Could your project harm part of the asset or put the asset at risk in any way?
- Do you understand the site well enough to make an informed decision?
- Will the benefits outweigh any harm/can you avoid risks to the asset?⁷

The conservation management plan is generally expected to present the site description and any assessment or analysis in a format that concentrates on specific 'character zones'. Any subsequent thematic assessment such as visitor use, ecology etc, will need to be clearly referenced and applied to each of the character zones.

Ten year management and maintenance plan

Whilst this management plan is more in line with a traditional management plan, its emphasis is on how the capital investment provided by HLF will be looked after. Applicants are required to use the information that is included in the conservation management plan to help them to prepare the ten year management and maintenance plan.

This plan should show how applicants intend to maintain the asset as a whole and any new works. This should take the form of a maintenance plan which includes the following information:

- Arrangements for annual inspection of the asset;
- A detailed schedule of items to be inspected and maintained, including immediate, annual and longer-term actions;
- The timing of maintenance work;
- The costs and resources needed for maintenance;
- Who will be responsible for the work;
- Arrangements for keeping an ongoing maintenance log.

There is a degree of assumption that the vast majority of the site's capital investment needs will have been included within the investment made by HLF, and therefore the ten year management plan will have a strong maintenance rather than development and improvement emphasis. However, HLF's remit does not always allow them to fund all of the potential capital needs that may have been identified by the applicant. If the applicant intends to address these further investment and improvement needs within the ten year timeframe, and include them within the same 10 year management and maintenance plan, they will need to take care to ensure that the document still adequately addresses HLF's requirements, and demonstrate that any further identified works can be implemented without negatively impacting on the heritage asset and the HLF investment.

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Current CABE Space guidance and research documents can be found at www.cabespace.org.uk

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Case Studies

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New River Loop, Enfield
Queen Elizabeth Country Park, Hampshire
Burnham Beeches, Buckinghamshire
Wellington Park, Taunton Deane
Lickey Hills Country Park, Birmingham
Wetley Moor Common, Staffordshire Moorlands
Leckhampton Hill, Cheltenham
Stoneleigh Park, Brownhill Nature Garden and High Crompton Park, Oldham
Southcrest Woods, Redditch

Photography credits

Page 37, Vicar Water Country Park, Newark and Sherwood (Green Flag Award winner)
Photograph courtesy of Michael Penty

Page 41, City of London Cemetery and Crematorium (Green Flag Award winner)
Photograph courtesy of ICD Photography

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