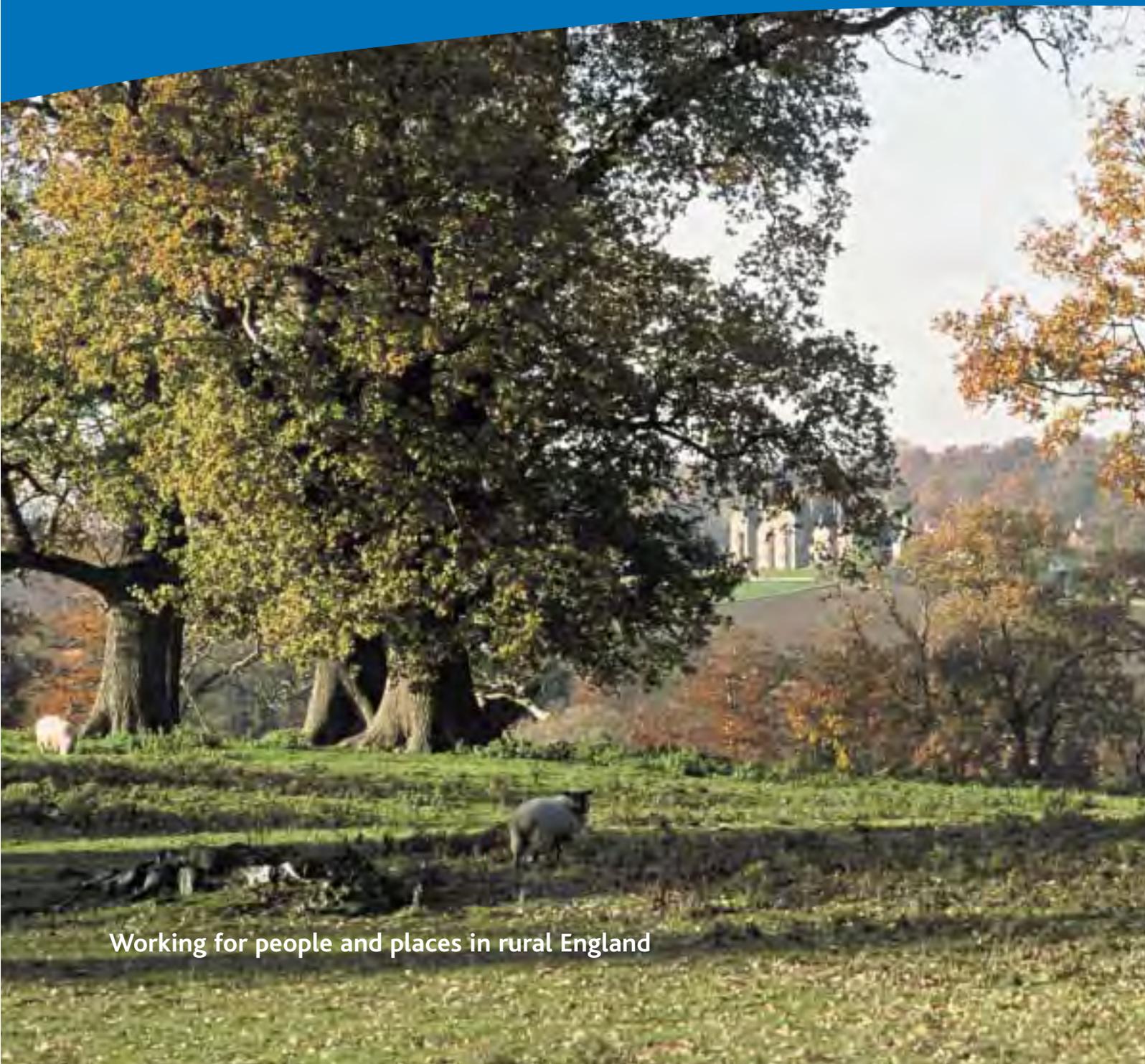


Preparing a Heritage Management Plan



Working for people and places in rural England

Acknowledgements

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Preparing a Heritage Management Plan

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The scope of this guidance

This technical guidance is designed to help **estate managers** prepare a Heritage Management Plan (HMP) for heritage property that has been:

- granted conditional exemption from capital taxation: or
- designated as the object of a Maintenance Fund (MF)

under the Inheritance Tax Act 1984 as amended by subsequent legislation.

It may also be used on a voluntary basis to prepare management plans for heritage property that has been exempted or designated without an HMP being required or in anticipation of submitting a claim for conditional exemption. The guidance is based on real Heritage Management Plans that work well in practice.

The guidance has been prepared by representatives of the Country Land and Business Association, the Countryside Agency, English Heritage, English Nature and Historic Houses Association. Inland Revenue Capital Taxes have reviewed this document and have offered no objections.

This document does not provide advice on other legislation such as town and country planning, listed buildings and ancient monuments, nature conservation and wildlife, environmental protection, health and safety, or disability.

A separate summary document has been prepared for owners and other interested parties to explain how the Heritage Management Plan process works (*Conditional Exemption and Heritage Management Plans - an introduction for owners and their advisers*, 2004).

Other relevant publications include:

- **CCP 527 Site Management Planning: A Guide** (Countryside Commission, 1998) explains the general approach to land management planning and presents a framework for management plans. Part one is particularly helpful as an introduction to management planning for those new to the subject.
- **Conservation Management Plans** (Heritage Lottery Fund, 2004) sets out a general approach - that has been adopted by English Heritage - for conservation and management of the historic environment.
- **Management Guidelines for World Cultural Heritage Sites** (Feilden BM and Jokilehto J, ICCROM Rome 1993) provides advice on management of World Heritage Sites.
- **Informed Conservation** (English Heritage, 2001) provides detailed advice on conservation projects.
- **Brief for the preparation of a condition survey and outline repair proposals** (English Heritage 1999).
- BS 7913 : 1998 **Guide to the principles of the conservation of historic buildings**
- **The Repair of Historic Buildings: advice on principles and repair** (Christopher Brereton, 1995), (English Heritage publication)
- **Forest Nature Conservation Guidelines** (Forestry Commission, 1990),
- **Woodland Rides and Glades: their management for wildlife** (2nd Ed.) (JNCC {Joint Nature Conservation Committee} 1993).
- **Plan Preparation Brief for Consultants** (Countryside Agency, 2004). The brief explains the role of consultants, summarises the contents of a plan, identifies when specialist surveys may be required, sets out the requirements relating to liaison and consultation with third parties, and includes recommended contract terms and conditions.

Heritage Management Plan (HMP) preparation

Why prepare an HMP?

The Inheritance Tax Act 1984 as amended by subsequent legislation requires an owner to agree detailed steps with Inland Revenue Capital Taxes to fulfil general undertakings to maintain and preserve the property and repair outstanding buildings as a condition of the tax exemption. The legislation does not specifically refer to a Heritage Management Plan (HMP). However, modern undertakings normally require preparation of an HMP.

The benefits of an HMP include:

- overall assessment of the property specifically with respect to the conditional exemption undertakings;
- agreed statement of the significance of the property;
- agreed baseline condition survey;
- agreed approaches and actions to maintain the outstanding importance of the property;
- cost-effective solutions to long-term management liabilities via strategic work programmes;
- clear system for monitoring and review;
- cross-compliance for other estate plans;
- common understanding between owners, Inland Revenue and the advisory Agencies that is a helpful basis for 5-yearly (quinquennial) inspections; and
- framework for applications for grant-aid and/or development proposals.

The Countryside Agency, English Heritage, English Nature (the Agencies), the Country Land and Business Association and the Historic Houses Association recognise the importance of traditional property management practices and that properties need to be financially viable.

An HMP demonstrates how management of the property can work positively with the undertakings. Agreeing the HMP with the relevant Agencies and implementing its proposals ensures that:

- the plan complies with the undertakings to maintain and preserve the property;
- the status of the designated heritage property is not at risk.

When to prepare an HMP?

Most HMPs are prepared under a 'deferred condition' ie preparation of an HMP is required within 24 months after exemption or designation. This approach means that the HMP can use information from reports prepared by the relevant Agency(ies) on the outstanding interest of the heritage property and can directly refer to the undertakings without delaying formal designation.

The HMP is prepared by the owner or their agents and approved by the Agency(ies) through a process of consultation, negotiation and agreement. An HMP cannot be imposed upon a owner.

Some owners prefer to prepare their HMP after the Inland Revenue has advised that their property qualifies but before signing undertakings. The owner will have a clearer understanding of the content of the HMP before signing, but the process of signing undertakings will be delayed.

In either case the final undertakings will usually make specific reference to implementing the approved HMP.

In some cases an owner may choose to prepare and implement an HMP in anticipation of submitting an application for conditional exemption or designation. These 'informal' HMPs can provide useful management tools. The Countryside Agency offers informal advice on the preparation of such HMPs. English Heritage will comment, where necessary, on proposals affecting their interests. English Nature will advise on the designated nature conservation sites.

Who is involved in HMP preparation?

The most important person involved in HMP preparation is the owner. The owner is bound by the undertakings and has a personal interest not only in the legal responsibilities but also in the positive future of the property. The owner is usually the person who knows the property best - its history, its outstanding qualities, its current management and its potential.

Some owners may wish to prepare the HMP themselves. This is achievable where he or she has professional training or relevant experience and/or the property is small or not particularly complex. Larger or complex estates often have professional advisers and estate managers who have the relevant skills and in-depth knowledge of the property to prepare a robust HMP in close consultation with the owner.

Some owners will not have the experience, training or resources to prepare an HMP and may find the prospect a little daunting - employing an HMP consultant to work closely with them in preparing the plan may be the way forward (see *Plan Preparation Brief for Consultants*, Countryside Agency, 2004).

Specialist help may sometimes be required, for example for an archaeological or invertebrate survey. It can also be a useful experience to step back and see the property from another point of view. It is important not to underestimate the work required in preparing an effective Heritage Management Plan.

Early consultation and discussion with the Agencies (the Countryside Agency, English Heritage and English Nature) and other consultees helps inform the scope of the HMP while the plan is still at an early stage. The Agencies and consultees can:

- indicate any specific management requirements;
- indicate available information or resources; and
- comment on specific management proposals that affect their interests.

This can save time in the long run.

The HMP needs to be formally approved by the Agencies with an interest in the property. Owners are advised to provide each relevant Agency with a copy of the draft plan and allow them at least six weeks in which to comment. Once agreed, a copy of the final approved plan should be sent to each of the relevant statutory Agencies, to the monitoring agent (if one is appointed) and to Inland Revenue Capital Taxes.

The HMP (excluding commercially or financially sensitive parts) can be deposited, on a voluntary basis, with the local planning authority or County Records Office as an important addition to the national knowledge resource.

The Countryside Agency currently offers discretionary grants up to 50% of eligible costs of HMP preparation: contact the National Heritage Unit for further information (see **Useful contacts**, page 31). The Countryside Agency may also offer discretionary grant aid towards the costs of other survey work which may inform or underpin a Heritage Management Plan.

HMP process

Key steps in preparing and implementing an HMP

- 1 agree the scope and purpose of the HMP
- 2 collect information
- 3 describe the property and assess its significance
- 4 agree baseline condition
- 5 set aims and objectives to implement the undertakings
- 6 develop a work programme
- 7 monitor the progress against the programme
- 8 review at 5-yearly intervals.

The process of preparing a Heritage Management Plan is as important as the product (the plan document itself) and should help answer these key questions:

- what is really significant about the property?
- how can the property be maintained and preserved, taking account of the significance and the circumstances?
- when can objectives be met, realistically?

Format of an HMP

The HMP is a working document. Estate managers have to take account of change, both from the natural factors and from financial and policy changes.

The monitoring and review stages offer an opportunity to revisit the plan as time goes by and to, for example:

- refine earlier objectives;
- amend the work programme to take account of changes or opportunities; or
- add more detail to the description if new information comes to light.

Aspects that are more or less unchanging for the life of the plan (such as geology, history, designations, assessment of significance, long-term vision and aims) can be presented as a separate section from the more dynamic parts of the plan (such as objectives, work programmes, grant regimes, financial plans).

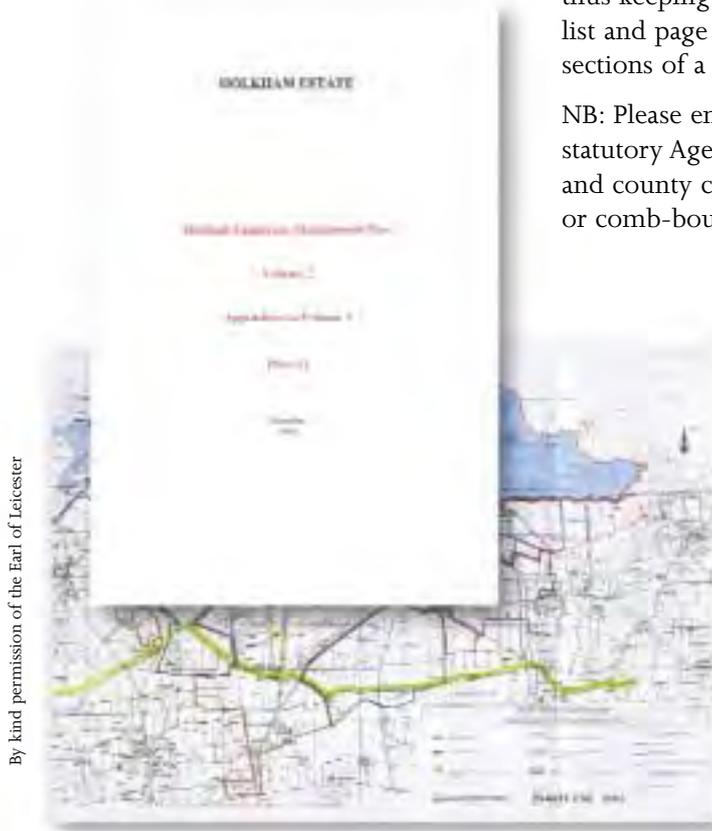
Presenting the HMP as a series of separate sections can aid academic research or public access to useful information about the landscape, history, archaeology or biodiversity without compromising security or financial or commercial management.

Maps, pictures and photographs are very useful components of an HMP and can be used to show geographical locations and patterns of distribution or to record the condition of elements. These are essential for baseline records. Putting maps etc. in a separate volume allows direct cross-reference between the text and the maps.

There may be other existing plans for the property, for example whole farm plans or forestry plans. Each different plan serves different, often very specific, purposes and will be a useful source of information. It is a good idea to review any existing plans to make sure that they complement the HMP and do not inadvertently jeopardise the status of the designated heritage property. It can be helpful to think of the Heritage Management Plan as an 'umbrella' over the existing specialist plans and surveys. The HMP can cross-refer to them as separate documents or can include them as appendices.

HMPs can be presented as a series of comb-bound reports - this is inexpensive and keeps pages from being lost. Some HMPs include Geographical Information Systems (GIS) for cross-referencing with other plans and maps. Some owners find that their HMPs work best in a loose-leaf format - for example in a ring binder - which allows new pages to be added, and superseded pages to be archived, thus keeping the plan up-to-date. A good contents list and page numbering helps to ensure that all sections of a loose-leaf plan are present and correct.

NB: Please ensure that the copies sent to the statutory Agencies, Inland Revenue Capital Taxes and county council/unitary authority are spiral - or comb-bound.



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A Heritage Management Plan

Contents of a Heritage Management Plan

Heritage properties range in size and complexity, and so do HMPs. Treat this guidance as a menu - include relevant topics only. Make sure the HMP:

- relates to the undertakings;
- covers all aspects of the property;
- contains an appropriate level of detail; and
- is comprehensive, clear and easy to use.

Keep any text brief - use short written descriptions to provide background, interpret images and help explain issues such as significance. Make good use of maps.

The key components of an HMP are:

Purpose of the plan
Description and history
Assessment of significance and summary of current condition
Management issues
Aims
Management objectives
Specific objectives related to condition
Work programmes
Monitoring and review
Appendices and maps

Each component is discussed in more detail below. See the fictitious HMP for Northanger Abbey prepared for illustrative purposes and attached as an Appendix at the end of this document (see pages 34-55)

1.0 Purpose of the plan

This short introductory section

- Explains the purpose of the plan and summarises the undertakings (cross-referred to the full undertakings in an appendix of the HMP)
- Identifies the parties involved in the plan preparation process:
 - the owner/s;
 - the estate managers/land agents/consultants/specialists;
 - statutory Agencies, local authorities or other organisations;
 - local residents, tenants, businesses, visitors etc.

Some owners like to include in this section a short explanation of their overall approach to the management of their property or present a 'vision' for its future.

Please include the date, author and status on the front cover or flyleaf of the HMP.

2.0 Description and history

This section comprises a factual description of the property and a summary of its history.

Be brief! The purpose of this section is to provide an overview of key aspects and features as context for management decisions. The place for additional detail is in the management objectives section (see page 15), with supporting background information in the appendices, eg baseline condition surveys, extracts from listed buildings descriptions etc (see Appendices and maps page 28).

If the HMP includes areas additional to the designated property, distinguish clearly between exempt and non-exempt property.

This section should include:

- Location and extent of property and ownership(s).
- Brief description of the physical character of the property.
- Summary description of statutory designations, assessments and policy context.
- Summary of the significant stages in the history of the property.

2.1 Location and extent of property and ownership(s)

- Include a description of the general location and geographical context.
- Identify the relevant parishes and authority areas (eg District, County, RDA).
- Give the area (in hectares and acres, for cross-reference with modern and historic documents) of the designated heritage property (and identify any other areas included in the HMP on a voluntary basis).
- Explain the ownership(s).
- Include map of designated property, HMP area and ownership(s) (in separate volume if preferred).

2.2 Brief description of the physical character of the property

- Describe geology, topography, drainage, climate.
- Describe soils and land use including agriculture, forestry, commercial development and sporting activities.
- Describe vegetation including field boundaries, woodlands and habitat types.
- Cross-refer to maps where helpful (in separate volume if preferred).

2.3 Summary description of the statutory designations, assessments and policy context

Include:

- landscape, historic environment or nature conservation designations;
- published landscape assessments;
- relevant planning policies;
- designated historically associated chattels (cross-reference to chattels inventory kept separate from HMP for security);
- existing public rights of way and permissive access including access to interiors of outstanding buildings and to historically associated chattels and regular events.

Cross-refer to:

- maps where helpful (in separate volume if preferred);
- appendices.

(see Checklist of Responsibilities of relevant advisory agencies page 32 for further guidance)

2.4 Summary of significant stages in the history of the property

The level of detail should ensure that the development of the property can be understood. This should include:

- evidence based upon documentary research (refer to estate maps, Ordnance Survey, enclosure awards and title maps, estate and family papers, aerial photographs, paintings showing topographical views of the property; consult the County Record Office, County Sites and Monuments Record and the local studies library);
- evidence supplemented by fieldwork to confirm the condition/extent of key historic environment features (look for physical evidence of features discovered in historical documents);
- a chronology setting out major phases of development and associations with significant people (including owners, designers, artists, writers and visitors) and summarising the evolution of the property, eg the designed landscape, the farmed landscape, notable buildings, significant phases of woodland change, relationship between evolution of landscape and features of significance such as habitats.



Sledmere Estate HMP. Courtesy of Sir Tatton Sykes Bart.

Documentary evidence of the property's history

Cross-refer to:

- key features of historic significance (historic buildings, archaeology, designed landscapes, wider historic environment);
- maps where helpful (in separate volume if preferred);
- appendices eg Landscape History.

2.5 Specialist surveys

It may be necessary to employ a specialist to undertake certain aspects of this work, eg:

- condition surveys of listed buildings (use an architect or chartered building surveyor preferably accredited in the conservation of historic buildings);
- archaeological surveys;
- historic landscape research;
- parkland tree surveys (for example an arboricultural survey will be helpful where there may be conflict between public access and older trees).



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Specialist surveys

3.0 Assessment of significance and current condition

This section identifies and explains the outstanding interest of those key aspects and features for which the property has been designated. It will include:

- A brief description of features/elements within exempt area - photographs or maps can be helpful.
- An assessment of significance including statement of outstanding interest - explain why the property and each feature is significant, eg its association with a national figure.

For each key feature:

- provide a brief description;
- explain why it is significant in its own right;
- explain its contribution to the outstanding interest of the designated property;
- assess its potential vulnerability and state what is required to retain the heritage qualities (significance) for which the property was designated.

Using the assessment of significance to inform management decisions will help conserve the outstanding interest of the property and retain conditional exemption status. It can also help resolve management conflicts.

Assessing significance relies on subjective judgements based on clear reasoning. Don't simply rely on designations - explain why the feature is significant. Assessment of significance will help target resources to maintain and preserve the key significant features and can also help develop more creative approaches to less significant features or less important aspects of the key features.

Start with a general statement about the significance of the property as a whole in relation to the regional, national or international context. Refer to the reasons for conditional exemption or designation for maintenance fund purposes and record any statutory designations.

Then identify the important features within the designated area, ie those which make a contribution to the outstanding qualities for which it was granted exemption. Cross-refer to photographs or maps if helpful.



Sledmere Estate HLMP. Courtesy of Sir Tatton Sykes Bart.

Identify and explain outstanding interest

3.1 Brief description

- Report on physical aspects eg for listed buildings note briefly the architectural styles, materials, designers/builders.
- Summarise current condition (with cross-reference to detailed baseline condition survey in appendix).

This section may address issues relating to current condition where a feature or aspect is particularly vulnerable (cross-refer to detailed baseline condition survey in an appendix). However, it may be more helpful to present information about current condition alongside management objectives (see page 15).

NB: The detailed baseline condition survey is a very important part of the Heritage Management Plan. This is an agreed statement between the owner and the Agencies on the condition of the property at the outset. The advisory Agencies will refer back to this baseline condition survey as a benchmark against which to monitor compliance with the undertakings. A good baseline condition survey will also often help support applications for grant aid.

See **Brief for the preparation of a condition survey and outline repair proposals** (English Heritage 1999)

3.2 Assessment of significance

Include:

- summary assessments of significance from the Countryside Agency's formal assessment report to Inland Revenue (for applications for conditional exemption for outstanding land dating from 2003 onwards);
- brief statements of significance prepared by English Heritage will be available from 2006/07 for properties on the forthcoming unified list (as proposed by the Department of Culture Media and Sport in the Historic Environment Protection Review);
- extracts from the notification paper for Sites of Special Scientific Interest prepared by English Nature setting out the significance of these designated sites of nature conservation importance;
- references to other published material about the property.

Use the assessment criteria on page 11 to assess the significance of other features/aspects of the property in the national, regional and local context.

3.3 Contribution to the outstanding interest of the property

- Consider how the feature relates to the historical development of the property (cross-refer to section 2.4 summary of history, plus any relevant appendices).
- Assess its contribution to local distinctiveness (eg local vernacular building style; particular estate identity).
- Assess its contribution to local/regional/national environment (eg assemblage of habitats, contribution to Biodiversity Action Plan)
- Consider how historically associated chattels can provide information/better understanding of the key people and/or the development of the property.

3.4 Assess vulnerability

- Use this section to pick up points identified in the summary of condition that are key to the conservation of significance.
- Flag up issues that will be dealt with in the next section on management issues and the further sections on management objectives.
- Identify implications for the overall heritage significance of the property bearing in mind its conditional exemption status.

Criteria for assessing significance

- **Existing designations:** any feature or part of the area with an archaeological, architectural, geological, historic, nature conservation or landscape designation that has already been assessed as 'significant'. Such designations represent a consensus of professional opinion of its importance.
- **The property as a 'historical document':** is there any significant evidence of the past that is obvious in the present (eg architectural styles, settlement/field patterns, archaeological remains, designed views)? Are there any significant cultural associations(eg was the ornamental landscape designed by a famous landscape designer, or an important previous owner)? Is there evidence of significant creative thought? Is the property/feature associated with historic or cultural events, people, artefacts or stories that go towards the story of England? Does the property/feature illustrate a significant stage or culture in national history? Do chattels contribute to an understanding of the property/feature (eg a topographical painting, furniture made specifically for the house when it was built or altered)?
- **The aesthetic value of the property/feature:** does it have/contribute to high scenic value (for example, part of an Area of Outstanding Natural Beauty, National Park or local designation such as a Special Landscape Area)? Is there harmony, contrast, interest in the scenery? Is there a strong sense of place (and what contributes to distinctiveness)? Is there tranquillity, or timelessness, or a strong association with a specific era?
- **The property as a 'scientific resource':** any features that have scientific interest either singly or in combination? For example, are there any good examples of physical geography (eg fossil beaches, revealed strata, drumlins, river systems)? Are there habitats or species of interest? Do any of the individual habitats complement each other to become more than the sum of their parts (for example the proximity of high forest, scrub and pasture together may be particularly important for bat species, or the network of tall hedges linking coppices may be interesting for a range of fauna)?
- **The rarity or representativeness of the property:** are there any elements/features/aspects that are nationally rare? Or notably representative?
- **The condition of the property:** are the features of significance in good condition? Is there clear evidence of the design? Are important features or designed layouts still intact?

4.0 Management issues

This section discusses the main management issues that arise on the property. These may include:

- conflicts between different uses;
- conflict between conservation and economic objectives;
- problems arising from previous or existing management regimes;
- conflicts between Heritage Management and other existing agreed management plans;
- implications of compliance with safety or access legislation for the character and/or conservation interest; and
- options for limited resource allocation.

There are 4 principal aspects to bear in mind for each management issue:

- Current management
- Constraints/concerns/conflicts
- Relationship of management to significance
- Future management opportunities

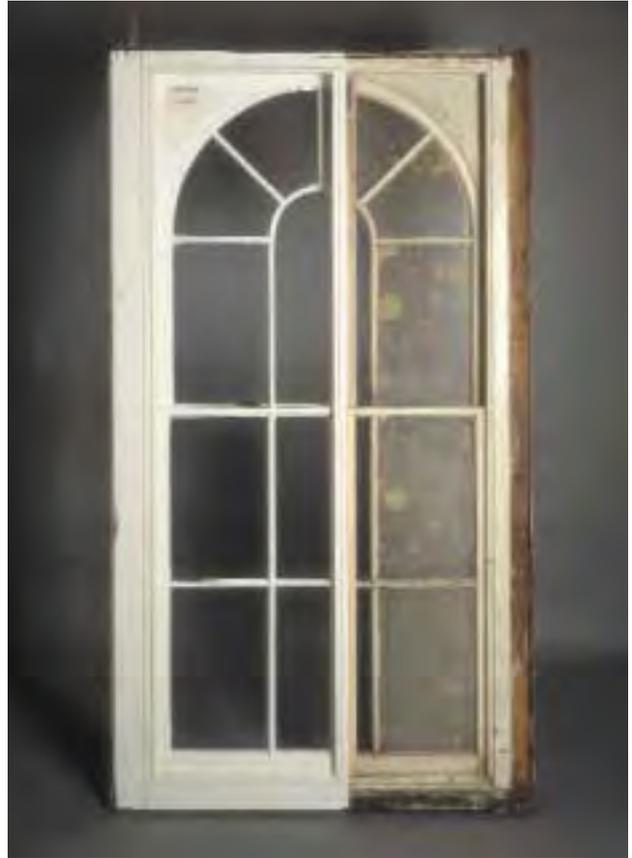
4.1 Current management

- Briefly explain how the property and its features are managed.
- Note past and current management approaches.
- Assess effects of any recent management changes.
- Identify social and economic factors or issues relevant to the outstanding importance of the property and its viable management eg agri-environment scheme payments, the shoot, commercial re-use of redundant buildings, affordable housing requirements.
- Summarise current or proposed arrangements for repair, development or change of use of land or buildings including any major repair/conservation tasks (eg programme for works, repairs done by own maintenance staff, repairs done by contractors).
- Briefly describe any regular cyclic maintenance programmes (eg buildings redecoration or designed landscape maintenance that is required, on an annual and on a five-yearly basis).



© P. Greenhalf

Hedge maintenance



By kind permission of Windowcraft of Holkham

5 year window maintenance

4.2 Constraints/concerns/conflicts

- Summarise resource issues eg staff, time, capital/revenue funding, grants (financially or commercially sensitive material can be put in a separate section with restricted readership).
- Summarise aspects of existing tenancy agreements relevant to management of heritage property.
- Cross-refer to any existing management plans or agreements eg World Heritage Site Management Plans, Forest Plans, Woodland Grant Schemes, agri-environment agreements, Whole Farm Plans (can be included in appendices or kept as separate but related documents).
- Identify specific works required to bring the property up to the standard of repair required by the undertakings.
- Identify conflicts and concerns and explain how it is proposed to resolve different/conflicting interests setting clear priorities and targeting resources.
- Identify any remaining/unresolved concerns.



© Charles Meecham

Redundant farm buildings - a management concern

4.3 Relationship of management to significance

- Set out how the significance of the property and the conditional exemption status will inform management decisions.
- Describe any special management required to protect key features identified in Assessment of Significance section (see page 9), eg taking significant archaeological features out of arable cultivation wherever possible.



© English Heritage

Protect key features through management



© English Heritage

4.4 Future management opportunities

- Identify short-term opportunities with assessment of likely success and realistic estimated programme for implementation.
- Set out longer term aspirations and indicate what needs to be done to achieve these goals.
- Identify resources to resolve management issues eg grant assistance, additional public opening, re-use of redundant buildings.

Long-term planning is an important part of the successful management of heritage properties. Small inputs on a regular basis over a long period can maintain the property, prevent major problems developing and will be achievable within normal resources. However, major repair or restoration schemes may be essential to overcome past neglect or catastrophic events. Don't forget to include longer term maintenance or management that need to follow on from major repair or restoration schemes.

Conservation questions

The 'conservation questions' approach can help inform management decisions by asking:

- does this action conserve (or enhance) the significance of the designated property?
- if not, does it have a neutral effect?
- if not, can it be amended so that it has a neutral or conserving effect?
- if not, will this jeopardise the significance of the feature or property or the conservation aims/objectives or compliance with the undertakings? (If the decision is taken to continue with the action despite its negative impact, set out the reasons and review the decision at HMP review).

Undertakings which only require the owner to preserve and maintain, without setting any specific standard, will be satisfied by works to arrest a deteriorating condition or to protect vulnerable features if thereafter only routine maintenance is necessary.

5.0 Aims

- This section sets out the overall aims (broad policies) for managing the designated heritage property taking into account its various uses and interests, conservation of the designation status and the practical realities of normal management.

Some people like to present the aims as a 'vision' at the front of the plan - a clear statement of the overall purpose to maintain and preserve the outstanding national importance of the designated property.

Sometimes it is helpful to present several specific aims each relating to a different aspect of significance, particularly if the property is complex.

If the vision and/or aims are based on a thorough site assessment then they will normally remain unchanged throughout the life of the plan.

There are 2 main types of aims:

- Mandatory requirements
- Voluntary enhancements

5.1 Mandatory requirements

Conditional exemption creates a responsibility, as set out in the undertakings, to maintain and preserve the outstanding interest of the property based upon the core concepts of the Inheritance Tax legislation, ie to:

- maintain outstanding land and preserve its character;
- maintain, repair and preserve outstanding buildings;
- provide reasonable public access.

These principles of conditional exemption can be expressed in terms similar to the principal aims of the HMP making clear their mandatory character by explicit reference to the undertakings, for example:

AIM 1 to maintain [name of the outstanding land] and preserve its character in accordance with the undertakings

AIM 2 to maintain repair and preserve [name of the outstanding building] in accordance with the undertakings

AIM 3 to provide public access in accordance with the undertakings

NB outstanding land often includes outstanding buildings and/or other buildings that contribute to its interest.

Additional information - such as summarising the character or drawing attention to particular aspects of significance - can be helpful, for example:

- to manage [name of property] as a traditional country estate and preserve its character in accordance with the undertakings as implemented by the management objectives set out in section X;
- to pay particular regard to the conservation of the features of significance described in section Z.

These types of aims are designed to conserve the outstanding interest for the benefit of present and future generations. Such conservation-focused aims, linked to a clear understanding of significance, will inform management objectives, day-to-day decisions, routine maintenance and the HMP review. They will normally preclude sudden or fundamental changes to significant features or aspects whilst allowing for appropriate change in response to social, environmental or economic forces. This management approach will not jeopardise the conditional exemption status of the designated heritage property.

5.2 Voluntary enhancements

Many owners aim to continue the tradition of continuous improvement established by previous generations, or wish to improve the economic viability of the property. The conditional tax exemption requirement is to maintain land and preserve its character or to maintain, repair and preserve property - as the case may be. Work that is **additional** to this is considered to be 'enhancement' and is therefore **voluntary**. It is up to the owner to decide when or whether to implement any voluntary enhancements - neither the advisory Agencies nor the Inland Revenue can require the owner to complete voluntary enhancements.

It is important to distinguish voluntary enhancements from mandatory requirements. If these two different types of aim are kept separate it will avoid confusion:

- during compliance monitoring inspections by Agencies; or

- when applying for agri-environment scheme grants using words such as ‘enhance’, ‘restore’ or ‘improve’ eg to **enhance** the nature conservation value across the estate; to **restore** the ornamental landscape of [name] Park where such restoration clearly goes beyond what could be required under conditional exemption; to **improve** the economic viability of [name] Farm.

Make sure any voluntary enhancement aims complement the mandatory requirements of the undertakings by asking the conservation questions outlined **Conservation questions** (page 13).

6.0 Management objectives

This section contains the most important statements to be included in the HMP, covering all aspects of managing the property. Objectives can be arranged by feature or management area and/or by interest or topic.

- Management objectives set out the detailed steps to be taken to implement the undertakings and the HMP aims.
- Complex properties may need more than one objective for any given feature/area/interest including general and specific objectives, whereas other plans may achieve good management with a few simple objectives.
- Try to make sure that objectives are SMART, ie:
Specific (to the purpose of the HMP and to the feature/area/interest eg does the objective achieve the aim? Will it comply with the undertakings? Does it address the relevant management requirements?)

Measurable (to help monitor progress)

Agreed (with the relevant Agencies)

Realistic (don’t set impossible goals)

Timetabled (by reference to the detailed work programmes in section 8 - see page 27).

Objectives can be:

- general;
- specific;
- long-, medium- or short-term;
- deleted once completed, eg at HMP review;
- a statement of purpose eg ‘develop and maintain a coppice with standards rotation in [name] Wood’;
- a statement of prescription ‘to coppice [name] Wood in 5 compartments each on a 15 year rotation, beginning with compartment 1 in 2005’.

6.1 General objectives

These set the context for more detailed objectives and address issues such as:

- management approach;
- historical understanding;
- significance;
- maintenance and repair methods;
- development proposals and consultation;
- tenants;
- access by the Agencies.

6.1.1 Management approach

It is helpful to include a general management objective to preserve the property in accordance with the undertakings. The conservation questions (page 13) can be included as part of this objective.

Some HMPs include a related objective to help make sure that all people involved in management have a good understanding of the significance or outstanding interest of the whole, or specific parts, of the property and will not inadvertently jeopardise the conditional exemption status. This can state that a high standard of management will be applied, that consultants and contractors will be properly briefed and that staff training will be provided where necessary.

Sledmere Estate HLMMP. Courtesy of Sir Tatton Sykes Bart.



Historical maps inform management decisions

6.1.2 Historical understanding

This HMP objective requires that conservation work, repair and restoration schemes and reviews to the HMP should be properly informed by reference to available historical information.

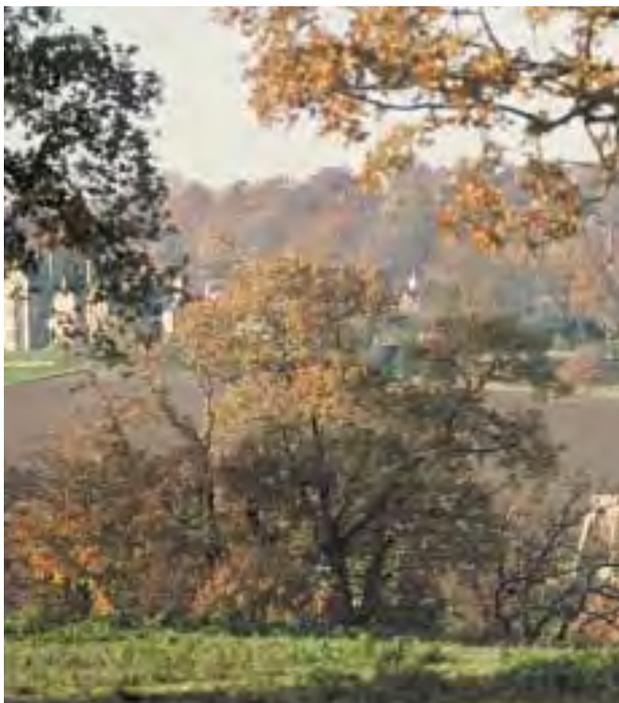
6.1.3 Significance

In more complex HMPs it can be helpful to include a general objective to conserve the features of significance, including a requirement to strike a balance between different aspects or features when planning or undertaking work.



© Simon Warner

Conservation maintenance and repair using traditional techniques



© P Greenhalf

Identify significance to help strike a balance between scenic, historic and scientific interests and the requirements of access, agriculture and forestry.



© English Heritage

6.1.4 Maintenance and repair methods

HMPs normally include a general objective that all maintenance and/or repair will be carried out in accordance with agreed conservation principles using appropriate/traditional techniques and materials.

By kind permission of the Victoria Hotel, Holkham



Proposals that preserve outstanding interest and enhance commercial viability
Proposed extension to Victoria Hotel, Holkham

6.1.5 Development proposals and consultation

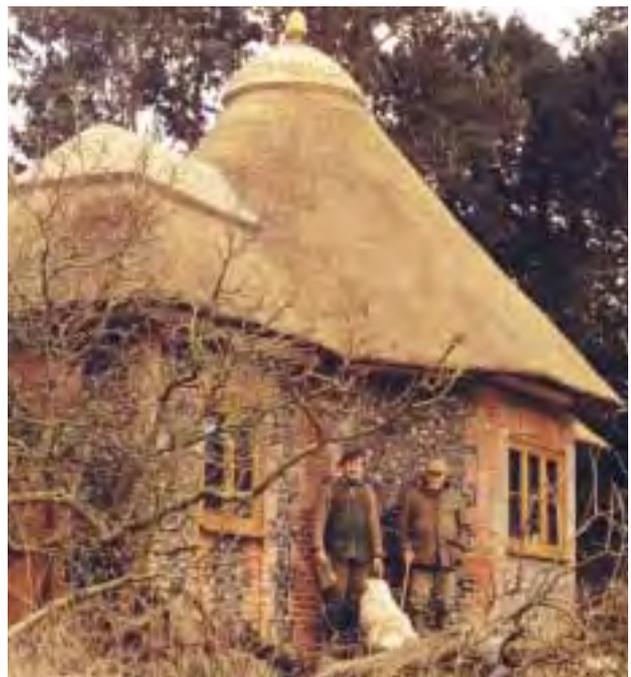
Where various new developments or new uses are likely during the life of the plan, the HMP can include a general objective stating that new development or new uses will be permitted provided proposals will preserve or enhance the outstanding interest of the property. This 'conservation change management' approach can ensure that improvements to the property and social and economic benefits can be provided without jeopardising the conditional exemption status.

This is normally accompanied by a general HMP objective to consult the relevant Agency over any significant works that may affect the property. Assessment of applications for planning permission or other formal consents will take account of statutory designations but not conditional exemption nor designation as the object of a Maintenance Fund. It is therefore theoretically possible that planning permission could be granted for a proposal that jeopardises the outstanding interest of the property. Consulting the relevant advisory Agencies will help protect owners from inadvertently undertaking works that might reduce the significance of a feature/area/interest and thereby jeopardise the status of the designated heritage property.

The objective can helpfully list the types of works that would benefit from consultation, eg:

- the demolition of the whole or part of any significant building or structure;
- all significant new building or engineering works¹;
- alterations to any significant building or structure;
- any significant change of use²;
- the sale or disposal of any historic maps, plans, documents or other archive material which in any way contributes to an understanding of the designated heritage property (simply so that the Agency can make arrangements for copying the material if necessary);
- the amendment or review of any plans which are required to accord with the objectives of the HMP (eg Woodland Grant Scheme); and
- any departure from the aims or other provisions of the HMP.

NB: Consulting Inland Revenue Capital Taxes before the sale or disposal of any part of the property will help protect owners from inadvertently jeopardising the exemption as a whole.



Courtesy of Anthony Meynall, Berry Hall

Proposals that preserve outstanding interest and enhance commercial viability
Conversion of the Buttery at Berry Hall to bed and breakfast accommodation

¹ including agricultural and forestry buildings and farm and estate roads and fences.

² including any agricultural improvement or intensification or forestry operation that would affect the scenic or other qualities of the designated heritage property.

6.1.6 Tenants

Where there are existing tenancy or licence agreements, the HMP normally includes a general objective to inform existing tenants or licensees of the heritage status of the property and the HMP requirements, and to use best endeavours to encourage tenants or licensees to comply with the requirements of the undertakings and the HMP.

Where new tenancy agreements are anticipated, the HMP normally includes a general objective to include restrictive covenants or lease clauses that require the new tenant to comply with the requirements of the undertakings and the HMP.

6.1.7 Access by the Agencies

The HMP is a formal document that demonstrates the steps to maintain (repair) and preserve the designated property as agreed with the relevant Agencies. It is therefore helpful to include a general objective providing for access, at reasonable times and at reasonable notice, by appointment by any person authorised by the relevant Agency for inspection and plan monitoring purposes.

7.0 Specific objectives related to condition

For each key feature or area:

- Describe the feature, referring to supporting information.
- Summarise condition (cross referring to detailed baseline condition survey appendix).
- Summarise current management practice.
- Assess the potential vulnerability of each of the significant features or aspects and state what is required to retain its heritage qualities (ie its significance).
- Set objectives identifying the work necessary to meet **mandatory requirements** to maintain and preserve the outstanding land or maintain, repair and preserve the outstanding buildings including any work required to bring the quality of the exempt property up to the required standard.

Clearly identify, as **voluntary enhancement**, any works proposed that are over and above the requirements of the undertakings.

- Check each objective with the HMP sections on history, assessment of significance and management issues and with other objectives using the ‘conservation questions’ approach (see page 13), to ensure cross-compliance.
- Where necessary, set out the steps to be taken to resolve any potential conflict between objectives including a brief summary of the reasons for decisions.

Specific objectives by topic in alphabetical order

7.1 Agriculture

HMP agricultural land management objectives normally focus on measures required to preserve the character of the outstanding land and its key features of significance in a manner that complies with current codes of good practice and good husbandry while maintaining the viability of the farming enterprise.

The relevant codes of practice are the DEFRA (formerly MAFF) *Codes of Good Agricultural Practice for the Protection of Air, Soil and Water* (1998), and the *Code of Practice for the Safe Use of Pesticides on Farms and Holdings*, known as the ‘Green Code’, (1998). The rules of good husbandry are those contained in Schedule 8, Part 1, of the *RICS Model Farm Business Tenancy Agreement* (2nd edition) plus the satisfactory control of pests, vermin and weeds.

Specific HMP objectives normally demonstrate how the general undertaking to maintain the land and preserve its character can be implemented on the ground, for example protect stone walls, continue to manage hedges in the current manner, retain permanent pasture, protect existing trees in arable areas and/or hedgerows, retain farm ponds etc.

This section often includes objectives that relate directly to agri-environment scheme prescriptions, such as: provide 6-metre field margins; create beetle banks; reduce fertilizer inputs; restore stone walls; gap up hedges; etc. Unless these are specific requirements of the undertakings they need to be clearly identified as **voluntary enhancements** and cross-referenced to the baseline condition survey in order to be eligible for agri-environment scheme payments.

HMP agricultural objectives can include additional measures such as integrated crop management techniques, organic farming or conservation of key features and habitats. Unless specifically required by the undertakings, these types of measures need to be clearly identified as **voluntary enhancements**. Cross reference to a 'Whole Farm Plan' can be helpful.



© P. Greenhalf

Traditional hedge management



© Nick Turner

Protect drystone wall



© P. Greenhalf

New hedgerow planting: voluntary enhancement



© English Heritage

Protect archaeology by careful management

7.2 Archaeological features

HMP objectives normally set out the measures taken to identify, record and/or protect specific above or below ground archaeological features.

HMPs can include objectives to take significant archaeological features in arable areas out of cultivation (subject to existing tenancy agreements), to manage grassland and/or to remove scrub and trees in a way that will not damage the archaeological significance.

HMP objectives that restrict cultivation to specified depths can help to conserve the outstanding interest where archaeological features remain subject to permitted cultivation under existing agreements.

It is helpful to include an objective to seek advice from English Heritage on proposals affecting battlefields and scheduled ancient monuments. It is also helpful to include a similar objective regarding seeking advice from the local authority archaeologist for archaeological features.

Contact the County Archaeologist or English Heritage for further guidance on setting archaeological management objectives.

7.3 Archives

For archives exempt as historically associated objects, the HMP objectives can be a useful way of setting out the steps to conserve the archives eg storage in appropriate environmental conditions, depositing in Records Offices, cataloguing, allowing appropriate public access as agreed with IRCT.

This approach can also be taken on a voluntary basis for archives which have not been exempted.

7.4 Buildings and other structures that contribute to the conditional exempt status

HMP objectives normally specify the basic requirements of conditional exemption ie to keep buildings in good repair, the standard of work, the conservation requirements for the fabric of the buildings, annual maintenance programmes and the need for subsequent five-yearly fabric inspections by suitably qualified people.

BS 7913 : 1998 *Guide to the principles of the conservation of historic buildings* and the English Heritage publication *The Repair of Historic Buildings: advice on principles and repair* (Christopher Brereton, 1995) offer guidance on conservative repair methods for a variety of building types and materials.

HMP objectives can also be used to address the issue of temporary buildings, major repair or restoration projects, re-use of redundant buildings and/or construction of new buildings

It is helpful to include an objective to seek advice from English Heritage on proposals affecting Grade I and II* listed buildings, registered parks or gardens, battlefields and scheduled ancient monuments; and to include a similar objective regarding seeking advice from the local planning authority conservation officer for all listed buildings and the local authority archaeologist for other features of the historic environment.

Contact English Heritage for further guidance on setting building conservation management objectives.



Conservation repair of outstanding buildings

Courtesy of HHA archives



Public access to chattels

7.5 Chattels (historically associated objects)

HMP objectives normally:

- set out how the undertakings for access can be implemented;
- set out the mechanism for recording the movement of chattels or for updating the inventory; and
- give details of any specific planned repair or conservation work including environmental measures for chattels.

It is helpful to include an objective to seek advice from English Heritage on proposals affecting chattels.

Contact English Heritage for further guidance on conservation objectives for chattels.

By kind permission of the Earl of Leicester



Courtesy of Anthony Streeten



Conservation of veteran parkland trees

7.6 Designed landscapes

HMP objectives normally identify management proposals for specific features or aspects of the designed landscape both in their own right and/or to address management issues. For example, an objective could identify conservation of veteran parkland trees as both historic environment features and for nature conservation value with tree surgery where necessary for public safety plus a programme of new parkland planting.

HMP objectives can include proposals to repair or restore the designed park or garden or specific features in accordance with a restoration plan. This should be based on historical research using approved repair or restoration principles and included as an appendix or referred to as a separate document.

Contact English Heritage for further guidance on setting management objectives for parks and gardens of special historic interest. The Garden History Society may be able to offer advice.

7.7 Scientific interest including nature conservation and geological heritage

HMP objectives normally state a commitment to continue to conserve the general outstanding scientific interest and/or any identified features of scientific significance which contribute to the conditional exempt status eg specific habitats, species or geological features.

The HMP can also include objectives designed to address the relevant priorities of the local Biodiversity Action Plan priorities and/or SSSI conservation objectives, including works required to bring any SSSI up to favourable condition. NB works need to be clearly identified either as mandatory requirements or voluntary enhancements, as agreed with English Nature.

It is helpful to include an objective to seek advice from English Nature on the scope and design of surveys and on the detailed management objectives.

Contact English Nature for further guidance on setting nature conservation and/or geological site management objectives.



Botanical survey

7.8 Recreation and access

Provision of reasonable public access is a key condition of tax exemption. Public access is a clear public benefit of the conditional exemption scheme that is readily understood and appreciated by the public. HMP objectives for recreation and access normally set out how the undertaking to provide reasonable public access will be implemented. A general objective confirming the commitment to provide the agreed public access and recording the mechanisms for publicising the access can be supplemented by specific objectives addressing any works needed to implement the access provision.

HMP objectives can define and describe monitoring arrangements for sensitive areas which are subject to access, for example recording annual visitor statistics and maintaining a photographic record of condition.

Objectives that provide improved access over and above the requirements of the undertakings such as car parks, picnic areas, improved access for people of all abilities, additional events, educational visits and links to public transport need to be clearly identified as **voluntary enhancements**.



© McCoy-Wynne

Clear waymarking helps people stay on the right path



© McCoy-Wynne

Maps show permissive access routes



© Jos Joslin

Consider access for all abilities

7.9 Sporting

Sporting activities are a traditional feature of an agricultural estate and frequently contribute to the commercial viability of the property. In some cases the sporting interest is responsible for the key features, for example moorland management for grouse habitat or development of coverts within an agricultural landscape. Good HMP objectives will strike an appropriate balance between the sporting interest and the significant features or aspects of the property, bearing in mind the undertakings to maintain the land and preserve its character and the need to avoid compromising the exempt status.

Cross-checking objectives during HMP preparation can result in specific objectives that retain important sporting activities whilst modifying current practices, for example to restrict public access at certain times of the year, to develop alternative drives to reduce potential conflicts with the public, to relocate game crops out of the designed landscape park, and/or to give priority to wild game species.



Strike a balance between the different interests of shooting, agriculture and outstanding land

© McCoy Wynne

7.10 Woodland

The HMP woodland objectives can help conserve any woodland that contributes directly or indirectly to the status of the designated heritage property and can help ensure forestry management does not compromise the designation.

The general woodland objective - for properties where woodland is a significant feature or contributes to other aspects of significance (eg nature conservation) - normally seeks to manage the woodlands in order to:

- conserve their landscape, historic, and wildlife interest; and
- maintain commercial viability where this does not conflict with other aims/objectives of the plan.

The HMP normally includes an objective relating to a long-term woodland management plan that complies with all relevant aspects of the HMP. This can be in the form of a new or existing Woodland Grant Scheme agreement or a Forest Plan, or can be a new woodland plan designed to suit the specific needs of the property.

Where a woodland plan already exists that does not fully accord with the HMP the objective normally states a commitment to amend the woodland plan at its next review in consultation with the Forestry Commission.

The Forestry Commission's *Forest Nature Conservation Guidelines* (1990), and the *JNCC Woodland Rides and Glades: their management for wildlife* (2nd Ed. 1993) offer useful guidance.

Specific HMP objectives can include commitments to replace conifers with local native species, to favour natural regeneration rather than planting, to plant cricket bat willows rather than poplars (reflecting changing markets), to manage rides for nature conservation, to improve the age structure of the woodlands, to fell certain areas without replanting to protect archaeology, or to create new plantations as part of parkland restoration or habitat creation.

Proposals to remove conifer plantations in parklands without replanting in the same location can be considered favourably by the Forestry Commission where this is an essential part of an approved HMP parkland restoration project.



© Chris Chapman

Woodland can be a key feature of outstanding land

Some HMPs include an objective to attain environmental certification status to improve the marketability of the timber products as well as to meet other HMP objectives.

It is helpful to include an objective to seek advice from Forestry Commission on the preparation of woodland plans or their amendment.



By kind permission of the Earl of Leicester

New planting in historic parkland

8.0 Work programmes

This section is the most 'active' part of your plan, subject to monitoring and review. It can be helpful to keep this section as a separate document.

The HMP normally includes one or more of the following work programmes:

- proposed work programme(s) for the first five-year plan period
- longer term work programme(s) eg over 25 years including both fairly firm proposals, such as agreed works set out in a Forest Plan, and more tentative aspirations;
- regular routine maintenance tasks, eg window painting cycle;
- 'one-off' tasks, eg major repair to building, construction of visitor centre, restoration of Victorian planting scheme (don't forget to allow for subsequent routine maintenance or regular refurbishment).

The work programmes set out the timescale for delivering the actions identified in the management objectives. Work programmes:

- help allocate resources (staff, time, finance);
- identify priorities;
- offer a phased approach to major projects;
- provide a framework for monitoring;
- can form the basis for annual monitoring reports to Inland Revenue Capital Taxes;
- are flexible (a statement of intent, not a binding contract) and subject to review in changing circumstances;
- can distinguish between mandatory requirements and voluntary enhancements;
- can be designed to reflect different timescales;
- cover all key significant feature or aspects (eg agricultural landscape, buildings repair and maintenance, designed landscapes, development proposals, nature conservation, plans and strategies, recreation and access management, woodland management);

Work programmes are usually set out in tabular or 'chart' form, normally with calendar periods (months, quarters, years) across the top and tasks (cross referenced to management objectives) down the side.

9.0 Monitoring and review of plan

The HMP is a statement of intent and relies upon implementation backed up by a system of monitoring and review.

- This section is a statement of requirements in relation to annual meetings, monitoring, plan reviews and access by statutory Agencies.

Annual monitoring meetings can provide a useful opportunity to bring together the different people involved in the overall management to check that objectives are being followed, monitor progress of planned works, and identify any changed circumstances. This is also an opportunity to amend the work programme if necessary. The HMP annual meeting can be timetabled to provide up-to-date information for inclusion in the annual report to the Inland Revenue.

It can be helpful to invite representatives from the relevant Agencies to the annual monitoring meeting if:

- the HMP proposes significant management actions or changes;
- the management issues are particularly complex.

This is an effective way of consulting the Agencies over proposals for the forthcoming year.

Monitoring implementation of the HMP will usually continue on a day-to-day, week-by-week basis as works are carried out. It can be helpful to make specific reference to the HMP when inspecting tenanted or licensed property.

HMPs need to be reviewed from time to time to reflect changing circumstances, for example, completion of objectives, new challenges and/or new opportunities. Experience suggests that 5-yearly reviews offer the best balance between planning the work and carrying it out. This can be programmed to use information from the formal quinquennial inspection carried out by the relevant Agencies.

Review means reassess and refocus rather than completely rewrite. Certain sections of the HMP, such as history, are unlikely to change but may be extended to include additional material, eg material arising from historical research. Aims and objectives that are long-term general statements of purpose are unlikely to require amendment. Specific objectives may need to be amended, or deleted if completed.

New objectives may be proposed, new opportunities or resources may be identified and new work programmes agreed. Any amendments or additions will need to be checked to ensure cross-compliance with the undertakings and the rest of the HMP, for example by using the ‘conservation questions’ approach (see page 13).

10.0 Appendices and maps

- To keep the plan itself as concise as possible, place all supporting information and maps etc. in the appendices.
- Appendices can be part of the HMP document or presented as separate volumes.
- Use appropriate scales and graphics for maps so that the relevant information can be presented clearly.

10.1 Baseline condition survey

This is an essential part of the HMP. Including a good baseline record - that states the condition of the property at the time the undertakings were signed - ensures that the relevant Agency has something objective against which to assess compliance. A good baseline record helps support applications for agri-environment scheme payments.

The baseline condition survey will address all relevant aspects of the property eg agricultural landscape, designated nature conservation or geological sites, other important habitats and geological features, outstanding buildings/structures, other buildings/structures, archaeological sites.

Map the extent and condition of key agricultural landscape features eg hedges, hedgerow and field trees, stone walls, park fencing, traditional orchards, traditional hedge banks, copses/spinneys, ditches, ponds, etc.

Photographs are very useful as a ‘snapshot’ of condition provided the photograph is clear and date-referenced. Record each building elevation, use ‘fixed-point’ photography for habitats and key landscape views if possible (ie take the photograph from a spot that can be easily identified so that a photograph can be taken again from the same place in future). For extensive features - eg hedgerows, ha-has, stone walls - a video record may be more helpful.

10.2 Other appendices

HMP appendices may need to include the following items (depending upon the type of property):

Access: map current rights of way and permissive routes. Note arrangements for access to property and access for events etc. Identify any areas which are sensitive to wear and provide a baseline condition record of vulnerable features.

Archives: catalogue archive material with outline descriptions of those most relevant to obtaining an understanding of the historical development of the property.

Buildings Condition survey (fabric inspection): this should be carried out by a chartered architect or buildings surveyor experienced or accredited in the conservation of historic buildings. It needs to record the condition of buildings and identify any necessary repair or maintenance works (prioritised and costed). It should be updated every 5 years. See **Brief for the preparation of a condition survey and outline repair proposals** (English Heritage, 1999)

Buildings Schedule: Mark the location of the buildings on plans, using 1/500 diagrams to identify buildings within groups. Take photographs of exteriors of all buildings, including all elevations, plus any evidence of damage or any interesting or significant details - photographs provide quick and useful evidence of condition at time of designation.

Chattels inventory: NB. This inventory is normally kept separate from the Heritage Management Plan (for security reasons). For compliance monitoring purposes, English Heritage recommend that each asset is described on a current room-by-room basis (including measurements where appropriate and a note of current condition). Include a statement explaining the close association and significance of the chattels’ contribution to the appreciation of the main building or its history. This might be backed up for example by quotations from past inventories, sales catalogues and invoices, estate papers, family histories and historic photographs. A full catalogue is required for books in libraries. There should be a photographic record including a photograph of the building(s) within which the chattels are located if the building itself is not itself included in the exemption. There should also be a scheme to record any subsequent movement of chattels (for example from one room to another). These records will bear testimony to the preservation of the chattels in

accordance with the undertakings given to the Inland Revenue. For further guidance contact English Heritage.

Designated area: Include a map of designated property and indicate the extent covered by HMP (if different) plus details of any related ownerships.

Designation documents: Copy relevant extracts from statutory designation documents to provide a single reference point for the HMP. These may include:

- listed building descriptions;
- scheduled monument descriptions;
- registered park/garden descriptions;
- excerpts from conservation area appraisals;
- SSSI/cSAC/SPA notifications;
- National Park/AONB/regional countryside character area landscape assessments, planning policies etc.

Include maps showing extent of statutory designations

Designed landscape: Include:

- copies or photographs of the principal historic surveys and maps;
- map(s) analysing evolution of designed landscape;
- restoration proposals;
- parkland tree survey;
- map of key designed landscape features, eg important vistas, walks, carriage drives etc.

Historic environment: Include:

- copies or photographs of the principal historic surveys and maps;
- fieldwork reports eg geophysical surveys;
- archaeological drawings;
- extracts from Historic Environment Records.

Map historic environment features, cross-referenced to schedule of historic environment features, briefly describing each feature and noting its present form and condition.

History: Include a chronology recording key dates and events; a list of sources; a description of the history of the property related to key associated people and physical evidence.

Land-holdings map: Show tenure with schedule of tenanted holdings including type and length of leases

Land-use map: Identify cultivated land/permanent pasture/woodland with details of current crop management/livestock production if relevant or useful. Also include agri-environment scheme maps and schedules (eg Countryside Stewardship, ESA), and geology and/or soils maps if useful.

Maintenance plan: Identify routine works with programme for buildings and other structures.

Other relevant plans: eg Whole Farm Plan, Woodland Grant Scheme, Forest Plan, SSSI Management Agreement.

Proposals: Include maps, drawings, design statements, schedules for proposals such as parkland replanting, hedgerow restoration, new buildings.

Sporting: Describe type(s) of activity (eg shooting, fishing, hunting) within the area, where appropriate stating whether it is in hand or let. Give details of nature and extent of activity eg timing

Undertakings: Include a copy of the Inland Revenue Capital Taxes undertakings (anonymised if necessary)

Woodland: Give a compartment-by-compartment record of all existing woodlands with information on species, age, condition and management. Where woodland is historically important, compartment notes should, where possible, give details of previous timber crops/management referenced to relevant historical information.

Conclusions

A good Heritage Management Plan helps you manage your property and pass it on to future generations. The process of preparing an HMP is as important as the end product, but it is the **implementation** of the plan that really matters. Successful implementation of a good plan will ensure you continue to achieve compliance.

These guidance notes represent current good practice and will be updated as more and more owners come up with better ways of making HMPs work for them. Please contact the Agencies, CLA or HHA if you have any suggestions for improving the guidance.

Glossary

Terms used in this guidance note in the context of Heritage Management Plans for conditionally exempt properties or properties designated as the object of a Maintenance Fund

Aims - the broad policies which will underlie the overall management of the property and indicate the intended balance that is to be struck between its various uses and interests.

Baseline record - a record of the extent and condition of the whole or parts of a property (including land, archaeological features, buildings and structures, chattels, and flora and fauna) and its management, normally taken at the start of a plan.

Chattels - objects historically associated with a building of outstanding historic or architectural interest (as distinct from objects designated as being of national interest in their own right, which are outside the scope of this guidance)

Compliance - the continuing fulfilment of the undertakings.

Conditional exemption (or heritage relief) - heritage property is exempt from Inheritance Tax provided the owner fulfils certain conditions as follows:

- maintain outstanding land and preserve its character
- maintain, repair and preserve outstanding buildings
- provide and publicise reasonable public access.

Exemption depends on compliance with the undertakings.

Conservation - all the processes of looking after a property so as to retain its significance, including the management of change¹, ie:

- managing the land in a manner which conserves its natural and man-made features;
- managing the buildings and objects such that they are properly maintained and preserved; and
- avoiding changes or development which would adversely affect the scenic, scientific or historic interest of the land or the historic and architectural qualities of the buildings.

Designated heritage property - property designated by Inland Revenue Capital Taxes as qualifying for exemption from capital taxes or which is the object of an approved maintenance fund, or both, comprising one or more of the following:

- an area of land of outstanding scenic, historic or scientific interest;
- buildings of outstanding historic or architectural interest and their amenity land; and
- chattels which are historically associated with such buildings.

[Section 31(1) Inheritance Tax Act 1984]

Maintenance - the routine work necessary to keep the fabric of a building, garden, landscape or other artefact in good order.

Objectives - state how the aims are to be pursued by defining what is to be achieved by management in both the longer and the short term within each interest use or each part of the property.

Preservation - Conditional exemption of outstanding heritage property does not necessarily require its preservation as a 'museum piece' but rather dynamic protection of its significant features. Just as the property which today counts as 'national heritage' reflects the experience and use of centuries, so it will change and adapt as social, environmental and economic circumstances change.

Reasonable public access - used in this document to mean:

- affording reasonable public access to the outstanding buildings
- access for walking and riding on existing rights of way and permissive paths, supplemented where necessary by new access; and
- publicising the availability of such access.

Repair - work beyond the scope of regular maintenance to return a building, garden, landscape, or other artefact to good order by remedying defects, significant decay or damage caused deliberately or by accident, neglect, normal weathering or wear and tear. The object of repair is to return a building, garden, landscape or other artefact to good order.

¹ 'Conservation' is not to be confused with 'preservation' which is concerned with maintaining an identified state of no change.

Restoration - the alteration of a building, garden, landscape or other artefact which has decayed, been lost or damaged or is thought to have been inappropriately repaired or altered in the past. This should only be undertaken where there is good information and where the restoration itself does not harm features or aspects of significance. The object of restoration is to make the building, garden, landscape or other artefact conform again to its design or appearance at a previous date.

Note: In these guidance notes the term **restoration** is used only in connection with landscapes.

Significance - means aesthetic, historic, scientific, social or spiritual value for past, present or future generations.

Sustainability in relation to HMPs - Heritage properties are designated for their outstanding importance for the nation. UK government policy is based on sustainable principles² and therefore the management of heritage property should follow such principles. This involves managing change so that the maximum significance is passed on to the next generation conserving the property in a manner which “negotiates the transition from past to future so as to secure the transfer of maximum significance”³. The process of preparing an HMP includes identifying those features which are of significance and providing for their conservation so that their essential character and qualities are not eroded or lost.

Undertakings - these are what the owner agrees to do in order to maintain the property (and repair outstanding buildings), preserve its character and provide reasonable public access. They are agreed as detailed steps with Inland Revenue Capital Taxes as a condition of the tax exemption.

Work programme(s), works - programme of recurring and non-recurring items or projects. Recurring items may include annual maintenance tasks relevant to heritage management. Non-recurring items or projects normally have to be completed in a specific year or within a defined period.

Useful contacts

Inland Revenue Capital Taxes

Heritage Section
Ferrers House
PO Box 38
Castle Meadow Road
Nottingham
NG2 1BB
Website: www.inlandrevenue.gov.uk/heritage
Tel: 0115 974 2490

Countryside Agency

John Dower House
Crescent Place
Cheltenham
Gloucestershire
GL50 3RA
website: www.countryside.gov.uk
Tel: 01242 521381
(ask for the National Heritage Unit)

English Heritage

44 Derngate
Northampton
NN1 1VH
website: www.english-heritage.org.uk
Tel: 01604 735400
(ask for your local regional office for designation enquiries or for the casework manager Stephen Nelson for HMP enquiries)

English Nature

Northminster House,
Peterborough,
PE1 1UA
Website: www.english-nature.org.uk
Tel: 01733 455000
(ask for your local regional office)

Country Land and Business Association

16 Belgrave Square
London
SW1X 8PQ
Website: www.cla.org.uk
Tel: 020 7235 0511

Historic Houses Association

2 Chester Street
London
SW1X 7BB
Website: www.hha.org.uk
Tel: 020 7259 5688

² 1987 Brundtland report defines sustainable development as “development that meets the needs of the present generation without compromising the ability of future generations to meet their own needs”.

³ Holland, A, and Rawles, K, 1993, ‘Values in Conservation’, ECOS 14(1), 19

Checklist of responsibilities of relevant advisory agencies

Countryside Agency

National Parks
Area of Outstanding Natural Beauty
Countryside Character Area
Heritage Coast
Open Access Land

English Heritage

World Heritage Sites (also contact ICOMOS UK)
Scheduled Ancient Monuments
Grade I and II* listed buildings
Historic Battlefields
Park/garden of Special Historic Interest (English Heritage Register)
Historic Landscape Character (where available)
National Monuments Record

English Nature

National Nature Reserves
Sites of Special Scientific Interest (SSSI)
candidate Special Areas of Conservation (cSAC)
Special Protection Areas (SPA)
Wetlands of International Importance (Ramsar Sites)
Veteran Trees
Regional Important Geological Site
Wildlife and Countryside Act Schedule I species
Red Data Book species
BAP target species
Ancient Semi-Natural woodland
Geopark
Natural Areas

Environment Agency

Nitrate Sensitive Zones
Potable water supplies

Local Planning Authority

Conservation Areas
Green Belt
planning policies and proposals
local landscape designations
local wildlife designations* eg Site of Importance for Nature Conservation (county site), Local Nature Reserve
Historic Environment Records (previously known as Sites and Monuments Records)
minerals and waste*
register of common land*
listed buildings

*higher tier authority eg County rather than District council unless Unitary Authority

Local highways authority

Rights of way

Assessment criteria for land of outstanding scenic, historic or scientific interest

Whilst the terms ‘outstanding scenic, historic or scientific interest’ are not defined in the legislation, the Memorandum *Capital Taxation and the National Heritage* (Inland Revenue, 1986) states that:

‘An area of land will be judged to be outstanding for its scenic interest only if it has qualities well in excess of scenic land of its general type. A starting point for consideration will be if the land is in one of the National Parks in England and Wales, in a designated Area of Outstanding Natural Beauty (AONB) in England, Wales or Northern Ireland or in a National Scenic Area in Scotland. Nevertheless within these identifiable areas there may be land which will not meet the high standards applicable to conditional exemption. Conversely there may be some land outside such areas which will qualify. Buildings on the land, and trees and underwood, may share in the exemption if they contribute to the scenic interest. The Countryside Commission and the Countryside Committee for Northern Ireland will advise in what respects the land is of outstanding interest. Relevant factors might include diversity of land form and feature, relative relief, vegetation cover including trees and woods, presence of water, land use and man-made features, or the contribution which the land makes to its wider setting, all assessed by national and not regional or local standards...

Land may be of outstanding scientific interest because of its flora (natural or cultivated), fauna, geological or physiographical features. Subject to the appropriate conditions being met ... and the scientific quality of the land being confirmed at the time of the exemption claim, land qualifies for conditional exemption if it is within a Site of Special Scientific Interest notified by the Nature Conservancy Council under Section 28 of the Wildlife and Countryside Act 1981 in Great Britain ... Some land outside these identified areas might qualify for exemption if it is of the requisite standard. Buildings on the land, and trees and underwood, may share in the exemption if they contribute to the scientific interest ...

In order to qualify as being of outstanding historic interest land must have a very special historic significance in national or international terms. For example, it might be judged to be outstanding because of its association with a particularly important historic event. Earthworks, archaeological sites or archaeological landscapes which have been scheduled as ancient monuments will clearly be eligible for consideration for conditional exemption, but each case will need to be considered on its merits. Buildings on the land, and trees and underwood, may share in the exemption if they contribute to the historic interest.’

Criteria for assessing Scientific interest

Guidelines for the selection of Biological SSSIs can be downloaded from the Joint Nature Conservation Committee (JNCC) website:
www.jncc.gov.uk/publications/ssi/default.htm

Northanger Abbey

Example Heritage Management Plan for illustration

This fictitious example shows the level of detail normally given in an HMP for a medium-size country estate.

- These square symbols cross refer to the Heritage Management Plan Guidance notes under each section heading, to show how this example plan relates to the guidance.

Northanger Abbey Estate

Heritage Management Plan

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* (Note: Appendices and Maps have been listed for illustration purposes but not included, except for Appendix 1: Undertakings)

1.0 Purpose of plan

- Explains the purpose of the plan and summarises the undertakings (cross-referred to the full undertakings in an appendix of the HMP);
- Identifies the parties involved in the plan preparation process:
 - the owner/s;
 - the estate managers/land agents/consultants/specialists;
 - statutory Agencies, local authorities or other organisations;
 - local residents, tenants, businesses, visitors etc.

In July 2003, following the death of Col. Tilney, the Inland Revenue designated under section 31(1) of the Inheritance Tax Act 1984:

- Northanger Abbey, with the adjoining ruins, as “a building for the preservation of which special steps should ... be taken by reason of its outstanding historic or architectural interest” (“the Abbey”)
- the park and further land shown edged green on Map 2 as land “essential for the protection of the character and amenities” of the Abbey (“the park”);
- further land shown edged blue on Map 2 as land of “outstanding scenic, historic or scientific interest” (“the heritage land”);
- chattels listed in schedule 1 of Appendix 1 as “objects historically associated” with the Abbey.

In July 2003 the Revenue also gave a direction under Schedule 4 to the 1984 Act in respect of the transfer by Col. Tilney’s executors of the separate property known as Woodston Parsonage to the trustees of a maintenance fund (the “MF”).

A copy of the undertakings given to support the designations and directions is attached as Appendix 1. This Heritage Management Plan has been prepared in accordance with the undertakings among other things to maintain, repair and preserve the Abbey and the historically associated chattels, and to maintain the heritage land and preserve its character (together referred to as “the exempt property”).

The preparation of this Heritage Management Plan was carried out by Mr. Henry Tilney, Col. Tilney’s heir, with assistance from his land agents and architect. Specialist surveys were prepared by Excellent Ecologists Ltd. and Acme Archaeologists Trust, with historical landscape research carried out by Ms. Lancelotte Brown to inform the preparation of this plan (see Appendices 6, 8 and 10). The Countryside Agency, English Heritage and English Nature provided assistance in the development and consultation stages and approved this plan. The preparation of this plan was grant aided by the Countryside Agency.

2.0 Description and history of Northanger Abbey estate

- Location and extent of property and ownership(s)
- Brief description of the physical character of the property
- Summary description of statutory designations, assessments and policy context
- Summary of the significant stages in the history of the property

Location of the estate

The Northanger Abbey estate (“the estate”) lies in [] District in the county of Gloucestershire and extends to approximately 728 hectares (1800 acres). It is located about 30 miles north of Bath as shown on Map 1 - Location.

The Heritage Plan area

The areas designated comprise the principal house, the Abbey ruins, the park comprising the gardens of the Abbey and its parkland as shown outlined in green on Map 2 - Land tenure and heritage area boundary, plus the woods and Home Farm, as shown outlined in blue on Map 2, totalling approximately 340 hectares (840 acres) .

Ownership

The estate (outlined in red on Map 2) is owned by Henry Tilney.

Henry Tilney also owns Woodston Farm, a separate estate which is not included for management plan purposes. Parsonage House, Woodston is owned by the trustees of the MF.

Physical character

The estate is situated amongst the outlying foothills to the north of the limestone Cotswold Scarp (see Map 3 - Geology). The Abbey lies at the centre of gently undulating parkland in a low-lying valley with gentle hills rising to 160 metres AOD to the north and east. There are numerous springs across the lower slopes which feed into the network of ditches and small streams on the lower lying land. (see Map 4 - Topography and Drainage).

This part of England is noted for its mild climate and early spring season. The higher parts of the hills are wooded with oak-ash-hazel woodland which acts as a shelter belt for the parkland, house and gardens, further improving climatic conditions. Spring at Northanger is usually one week ahead of that in nearby Vale of Evesham.

The surrounding estate farmland comprises mixed arable land on the brown earth soils of the better drained lower slopes with meadows for the dairy herd on the silty clay soils of the low lying land and pasture for sheep on the thinner well-drained calcareous soils of the steeper limestone slopes (see Map 5 - Agricultural Land Classification).

The meadows are bounded by dense tall hedgerows, whilst field boundaries of the higher pastures are in poor condition comprising post and wire fencing with hawthorn trees that represent former hedges. The parkland boundary wall is a noticeable local feature which runs alongside the public road.

The former woodpasture of the original deer park is evident in the numerous veteran oak trees within the landscape parkland.

Other Statutory Designations

See Map 6 - Designations, and Appendices 2 - 5, 7 and 9 for notifications and descriptions.

Both the Abbey and Woodston estates lie entirely within the Cotswold Hills Area of Outstanding Natural Beauty.

The Abbey is a Grade I listed building. The Lodge Gatehouse and the Lodge Gates and Gate piers (and Woodston Parsonage) are all Grade II. Northanger Park is listed Grade II* in the English Heritage Register of Parks and Gardens of Special Historic Interest in England. The remains of the Abbey are a Scheduled Ancient Monument. See Appendices 3-5 for list, schedule and register descriptions.

Northanger Wood and part of the Park are SSSIs. All of the hill woodland is ancient semi-natural woodland. See Appendix 7 for details.

Relevant planning policies are set out in Appendix 9. These include:

*1 a general policy to conserve the outstanding landscape quality of the Cotswolds Hills AONB

*2 a general policy to conserve the landscape character of Countryside Character Area 107: Cotswolds, and local landscape character area Northanger Hills, with reference to the Landscape Appraisal Supplementary Planning Guidance.

*10 a general policy regarding agricultural development including farm buildings which refers to advice set out in the Countryside Design summary Supplementary Planning Guidance.

*11 a general policy requiring high standards of design for new development to respect local character which refers to the Countryside Design Summary Supplementary Planning Guidance.

*23 a general policy requiring protection of the historic environment including listed buildings, scheduled ancient monuments and registered parks.

A brief history of the estate

(See Appendix 10 for fuller account)

Northanger (Northungar) is recorded in the Domesday Book with a population of 14, which would perhaps equate to an actual population of around 60-70, and as held by Bictric Snow, Lord of Tewkesbury, but confiscated by William I, who endowed part of the Northanger manor as a convent under the jurisdiction of Tewkesbury Abbey.

The convent prospered until the dissolution of the monasteries in the 16th century when it passed to Francis Tilney, a judge. The estate has remained in the ownership of the Tilney family.

Francis Tilney retained a large portion of the mediaeval Abbey buildings to provide a comfortable house, reusing some of the stone from the outlying buildings. There is little other evidence of work dating from this period, although the estate accounts note that there were extensive repairs to the deer park boundaries at a time when other deer parks were being disemparked for agriculture.

His descendant, an 18th century General Tilney, undertook extensive works to the Abbey and the surrounding grounds. He demolished the range of Abbey buildings to the south of the quadrangle and replaced them with two neo-classical wings east and west of the central part of the house. He also constructed the stable block to the north of the Abbey, new lodge buildings and gates at the southern approach, and new extensive walled kitchen gardens with numerous hothouses and a pinery.

Works to the grounds included the laying out of shrubberies, a grove of fir trees and a new carriage drive through the former deer park which was improved in the landscape style. A plan of the grounds dating from 1795, and overmarked in ink, shows the lodge buildings near their existing position, a sinuous carriage drive and new plantings of tree groups across the park and in the approximate location of the existing shrubberies (see Map 7).

The collection of books in the Library and the Staffordshire pottery collection were begun by General Tilney in the late 18th century. The fine funerary monument in the church was erected by General Tilney in 1786 in memory of his late wife.

Woodston Parsonage dates from the late 18th century, and was part of the extensive improvements carried out by General Tilney, including the Parsonage walled kitchen garden. His younger son and eventual heir, also a Henry Tilney, took on the Woodston property and carried out further improvements. Although the property remained in the family, the Parsonage was rebuilt in the late 19th century. This valuable house is now in the MF and is to be sold as soon as possible.

The novelist Jane Austen visited Northanger Abbey in 1802, and described the house and grounds in her novel Northanger Abbey.

The 19th century saw little change to the house or landscape. Parts of the Northanger woods and the Parsonage plantations were felled and replanted with conifers in the interwar years of the early 20th century, and the parkland was subdivided into separate fields by post and rail fencing for horses in the 1960s.

3.0 Assessment of significance

- Brief description of features/elements within exempt area - photographs or maps can be helpful
- Assessment of significance including statement of outstanding interest - explain why the property and each feature is significant, eg, its association with a national figure

For each key feature:

- provide a brief description;
- explain why it is significant in its own right;
- explain its contribution to the outstanding interest of the designated property;
- assess its potential vulnerability and state what is required to retain the heritage qualities (significance) for which the property was designated

The estate

Although there are numerous individual features within the estate that are of outstanding interest in their own right, their relationship with each other and with the topography of the estate combines to create a landscape of high scenic value. The visible evidence of different periods in the estate's development creates a great sense of time-depth. The retention of ancient woodland, veteran trees and extensive agriculture in the parkland, meadows and hillside pastures provides good habitat which is important for nature conservation. The management of the estate is generally sympathetic and has retained most features in good condition. The combination of these factors makes the estate a very good example of a small English country estate.

The estate is also notable for its association with Jane Austen, who used the Abbey as the setting for her novel *Northanger Abbey*, published posthumously in 1818.

Significant individual features within the estate are noted below (see Map 7 - Location of significant individual features and Appendix 11 - Photographs, photo numbers 1- 12).

Northanger Abbey

The Abbey

A country house with a fascinating combination of neo-classical and mediaeval features and evidence of time-depth. The Abbey is the single most important feature of significance upon which the designation of the estate depends. It is a Grade I listed building and therefore of outstanding importance in its own right, for its interest as an example of neo-classical improvement and mediaeval origin and for its association with the novelist Jane Austen. The seven bay, three storey south front with its wings has a neo-classical appearance. However, the rear elevation still shows its mediaeval origins with the original windows retained as demonstrated by the pointed form of the Gothic arch and the casement windows (although the glass dates from the 18th century). Inside, while the front (south) rooms have fine neo-classical interiors in the plainer style of the late 18th century, the rear part of the house is formed from the remnants of the convent. Externally, the Abbey porch has been retained as the front entrance and two sides of the quadrangle are rich in Gothic ornamentation. It is the unique manner in which

the neo-classical is linked with the mediaeval that gives the house its very distinctive character. See photograph 1.

Abbey ruins

Beyond the house to the north, parts of the original Abbey outbuildings remain as picturesque ruins set in lawn. Their original plan form and their relationship with what is now the house is apparent from the ruins which are a scheduled ancient monument in recognition of their national importance. See photograph 2.

South Lodge

The gatehouse, gates and gate piers are listed Grade II. Constructed in the 18th century by General Tilney, they incorporate decorative stonework taken from the Abbey, important for historical and architectural interest. See photograph 5.

The shrubberies

The ornamental shrubberies to the east of Northanger Abbey comprise a mixture of shade-tolerant evergreen and deciduous shrubs leading to the grove of "Scotch firs", referred to as of gloomy aspect in the novel *Northanger Abbey* by Jane Austen, but forming an attractive feature of the grounds against the backdrop of the Northanger woods. The shrubberies were probably laid out by General Tilney in the 1790s for his wife, with possible influences from Repton, and are important as an integral part of a model Georgian country house estate. See photograph 3.

Walled kitchen gardens and hothouses

Between the shrubberies and the rising woodlands to the north lie the south-east facing walled kitchen gardens, constructed by General Tilney in the 18th century. The garden walls and the timber glasshouses are all listed Grade II. They are important both architecturally and for their completeness, as well as being exceptionally well documented. General Tilney's letters, journals and steward's accounts contain several references to the construction and stocking of the numerous walls, the large variety of fruit trees, the numerous hothouses, and the pinery. These were also referred to in the novel *Northanger Abbey*. The surviving structures of the kitchen garden combine with the good documentary record to provide an excellent historical resource. See photograph 4.

The Park

The Park, including the veteran oak trees SSSI (photo 6) and Northanger Wood SSSI (photo 7), is also designated as land essential for the protection of the character and amenities of the Abbey. The layout of the carriage drive, tree groups and shrubberies are attributed to Repton but the only evidence is a brief correspondence between Tilney and Repton referring to an invitation to visit Northanger which had to be postponed.

The Park retains much of its former mediaeval deer park character. Many of the numerous individual oak trees are older than the 18th century parkland design which accentuated the undulating landform by concentrating new planting on knolls. A carriage drive curves through the parkland and terminates at the Lodge gatehouse, gates and gate piers at the southern boundary of the park. The Park is Grade II* on the English Heritage Register of Parks and Gardens of special historic interest for its historic interest as a former deer park and English landscape park, its expression of time-depth and the intactness of the Georgian ornamental landscape. The design of the landscape parkland has taken full advantage of the natural topography of the area and the presence of woodlands on the hills to the north and east, creating a sheltered landscape of attractive composition in keeping with the picturesque aesthetic of the 18th century. The parkland is permanent pasture which has been the dominant land use since the Dissolution (except for a brief period during World War II) and is an essential component of the parkland scene.

Veteran oak trees SSSI

Part of the parkland is also designated as an SSSI for the numerous veteran oak trees and for the associated diverse invertebrate population including lichen and the Purple hairstreak butterfly, *Quercus quercusiana*. The oldest trees are great pollarded oaks, approximately 400-500 years old. These date from the former deer park and were incorporated into the landscape park as picturesque elements. Several of the trees are outstanding specimens. See Appendix 17 - Tree Survey for location and details of individual specimens.

The woods

Northanger Woods SSSI is predominantly oak ancient semi-natural woodland with some ash and field maple communities and some evidence of replanting. The woods accentuate the shape of the low hills and provide an attractive backdrop to the Abbey and adjoining steep hillside pastures of semi-improved grassland. The woods are a good example of managed semi-natural woodland, with rich, diverse ground flora. They are of national scientific interest and contribute to the scenic interest and landscape character of the Park. See photographs 7 and 8.

Home Farm

Home Farm meadows: the scenic land designated as of "outstanding scenic, historic or scientific interest" is a mosaic of small irregular fields bounded by tall broad hedges of good diversity with hedge banks, ditches, streams, numerous hedgerow trees and species-rich grassland communities. It is of historic interest for its mediaeval enclosures, scientific interest for its habitat and scenic interest for its strong sense of place and countryside character. See photograph 9.

Sporting interests

The []shire Hunt meet at the Abbey approximately [] times a year during the season. The late Col. Tilney had also established a successful pheasant shoot with a reputation for high birds. The estate lets a number of shooting days every year and provides shooting lunches. These sports are typical of a country estate. They contribute to its significance as outstanding land in terms of:

- the land management and landscape features required to support the sports;
- continuing the long-established tradition of country recreation at Northanger Abbey.

The source of income from the shoot is likely to become increasingly important.

House contents

The collection of books in the library, the Staffordshire pottery collection, the dining room furniture made for the house, the black and gold cabinet in Japanese style and a number of paintings depicting the estate in the last quarter of the eighteenth century have been granted exemption as historically associated objects.

Both the collection of books in the library and the Staffordshire pottery collection were begun by General Tilney in the late 18th century. It has been possible to confirm from the library catalogue commenced by the General that no books were ever sold although the inventory notes certain books lent to named persons that were not returned. Individual books are also of note since they are directly referred to by characters in Jane Austen's *Northanger Abbey*, for example *The Mysteries of Udolpho* by Mrs. Radcliffe, and include marginal notes considered to be by Jane Austen herself.

The Staffordshire pottery collection is of exceptional quality. The dining room furniture, which dates from the late 1780s, was specially ordered for the room from a local cabinet maker, Pudneys, and made to a design that, while echoing the Chinese taste, cleverly imitates the columns and vaulted ceiling of the room. The Japanese cabinet is described in Chapter 21 of Jane Austen's novel in which she parodies the style of the Gothic novel. The paintings depict the Abbey and the surrounding landscape before and after their alteration in the last quarter of the 18th century. Research has shown them to be unusually accurate depictions of the landscape of the period making them of outstanding significance for both their quality and historic interest.

The objects are of significance due to their historical associations with the Grade I house - hence their tax exemption. They are also of interest for their historic associations with Jane Austen's novel.

4.0 Management issues

- Summary of the main management issues.
- Conflicts between different uses.
- Conflict between conservation and economic objectives.
- Problems arising from previous or existing management regimes.
- Conflicts between Heritage Management and other existing agreed management plans.
- Implications of compliance with safety or access legislation for the character and/or conservation interest.
- Options for limited resource allocation.

There are 4 principal aspects to bear in mind for each management issue

- Current management
- Constraints/concerns/conflicts
- Relationship of management to significance
- Future management opportunities

The four key management issues at Northanger Abbey are:

- balancing the need for an economically viable estate and conservation of the scenic, historic and scientific interest;
- the maintenance of a family home, with its park and gardens, so as to preserve its features of significance and cope with public access;
- potential conflict between conservation of the veteran trees and public safety; and
- potential conflicts between public access to scenic land and the sporting activities of the estate.

Key management issue 1: Economic viability

Current concerns

- The current agricultural economy yields poor prices for sheep meat and for milk. The sheep flock was making financial losses in the 1990s and the estate considered selling its milk quota.
- The income generated by the agricultural business is not sufficient to meet the high costs of maintaining the historic buildings fabric.
- Increased mechanisation and reduced labour force means that traditional boundary maintenance such as hedge laying has been neglected and there are insufficient resources to carry out this work. Continuing lack of maintenance will result in the loss of the hedgerows as a significant landscape feature.
- Increased stocking rates and changes in stocking practices could lead to conflict between pasturing of cattle and ground nesting birds.
- The most productive agricultural land is under arable and is managed intensively to maximise revenue whilst retaining hedges and hedgerow trees, and so far has helped subsidise the rest of the estate. There is potential conflict between deep ploughing and the health of hedgerow oaks, as demonstrated by the tendency of oaks alongside fields 1 and 5 to go stag headed. Continued deep ploughing will result in the loss of the trees which are a significant landscape feature.
- Income generated by the sale of shooting days forms an increasingly important part of the income from the estate.

Resolution of conflicts

- The estate decided to go for organic status for Home Farm in 1996 and has now achieved organic certification for the sheep, dairy and part of the arable land (to provide organic feed for the livestock). This is showing an increased financial return which is putting the estate on a better financial footing. However, it is still not sufficient to fund the major repair work required for the house, glasshouses and walled kitchen garden.
- A Countryside Stewardship Scheme has been put in place for the Home Farm and includes an element of hedgerow restoration on the hillside pastures (see Appendix 12).
- There is a Whole Farm Plan for Home Farm which includes landscape and nature conservation as priorities (see Appendix 13) and sets out grazing rotation practices which keep cattle out of fields 3 and 4 (favoured by ground nesting birds) during the breeding season.
- The new policy of including field margins alongside both sides of hedges which contain significant oak trees is intended to improve the health, condition and appearance of the hedgerow trees.

Remaining concerns

- The agricultural business cannot support the costs of repairing the significant buildings. There is concern that, as more farms enter organic schemes, future income will fall. There is also concern that designation as heritage property will affect eligibility for agri-environment scheme funding.

Key management issue 2: Maintenance of the fabric of the Abbey and walled kitchen gardens.

Current concerns

- The roof of the Abbey had deteriorated significantly over the last two decades. Extensive work is required to bring the structures up to the required standard. Work is also required to enable the public to visit the old Abbey kitchen which still contains some of the 18th century equipment installed by Gen. Tilney. These works are estimated to cost £1.2 million which is significantly more than can be funded from the agricultural business.
- There are significant outstanding repairs needed to the kitchen garden walls and the hothouses which are beyond the financial resources of the estate at present.
- Opening the house and walled kitchen gardens to the public carries a risk of personal injury to the public from structures in poor or deteriorating condition.

Resolution of conflicts

- A grant from English Heritage helped with the cost of phase 1 of roof repairs, and it is now weatherproof. The additional works required can be phased over the first five years of the plan period. Further grant assistance will be sought.
- The walled kitchen gardens have recently been developed as an organic plant nursery, focusing on rare and unusual herbs, fruit and vegetables. This is proving to be a popular tourist attraction as well as financially viable at present. A risk assessment of the walls, relating to public safety, is carried out annually.

Remaining concerns

- The significant costs of fabric maintenance cannot be met by the estate and substantial grant assistance will be required.
- Additional costs may be required as regulations change, for example new toilet provision for disabled visitors.

- Whilst maintenance costs will reduce to a more manageable sum for routine annual maintenance once the major repairs have been undertaken, any further damage caused by future cataclysmic events such as storms will require significant financial input which will prevent funding of other aspects of the management plan. The priorities and timing of operations in the work programme may need amendment from time to time to take account of changing circumstances.

Key management issue 3: Potential conflict between conservation of the veteran trees and public safety

Current concerns

- There is potential conflict between the tendency of the veteran trees to drop branches and the safety of people driving along the public highway which runs alongside the park, walking in the parkland or parking in the parkland during the autumn fair.
- The veteran trees in the parkland are of high importance for nature conservation, historic and scenic interest. Retaining dead wood in the canopy contributes to the trees' important habitat role.
- Carrying out tree surgery to all the veteran trees where there is a potential public safety risk is a high and recurring cost, which conflicts with the allocation of funds elsewhere on the estate notably to the maintenance of the buildings.

Resolution of issues

- Tree surgery needs to be prioritised through a formal risk assessment procedure. Tree surgery to trees alongside the public highway, carriage drive, principal historic pedestrian routes and trees adjacent to buildings needs to be undertaken in the first year of the plan to remove limbs of sufficient size and condition to be considered a high risk. Smaller branches and twigs are not considered a serious risk and do not need to be removed.
- Pedestrian routes associated with modern opening to the public and car parking can be restricted to the more open parts of the parkland, thus 'moving the target' (the public) away from the risk (the trees). This will also help reduce the risk of compaction on the root zones.

Remaining concerns

- There is still a risk that damage will occur. A programme of arboricultural inspections and risk assessments for those trees offering potential risk will need to be built into the work programme. These inspections will need to be carried out in winter, in summer and after significant storm events to assess whether additional tree surgery work is required.

Key management issue 4: Potential conflicts between public access to scenic land and the sporting activities of the estate.

- Visitors to the Abbey are to be offered a plan showing public rights of way across the estate and the additional paths made available to visitors to enable them to appreciate the landscape of the estate, the views of the Abbey itself and the views over the important Home Farm meadows. The Abbey and these additional paths will not be open to the public between [date] and [date] in any year, in order to minimise the danger to members of the public who might be on rights of way on the estate while a shoot or a hunt is in progress.

5.0 Aims

- Statement of overall aims (broad policies) for managing the designated heritage property, taking into account its various uses and interests, conservation of the designation status and the practical realities of normal management

AIM 1 To maintain the exempt property, preserve its character and repair outstanding buildings in accordance with the undertakings by managing the estate as a traditional country estate in accordance with the objectives of this plan.

AIM 2 To use management practices that are consistent with Aim 1 and which are designed to conserve the heritage qualities of the exempt property and the features of significance (described in section 3.3) through appropriate and sustainable policies and practices.

AIM 3 To protect the existing opportunities for public access including existing public rights of way and permissive paths and the access arrangements which are set out in the undertakings.

These policies underlie the management of the estate and indicate the balance which is to be struck between different interests, acknowledging that the objectives set out in the undertakings should be accorded highest priority.

The plan permits appropriate change in the nature, scale and timing of any work, which may follow from social, environmental or economic forces, where the change accords with the aims and objectives of this plan. The need to ensure continued economic viability of farming, forestry, horticulture and other commercial activities of the estate and the maintenance of the Abbey as home to the Tilney family are recognised and encouraged where these do not conflict with aims 1 and 2 of this plan. Fundamental changes to the heritage qualities and/or features of significance are not likely to comply with aims 1 and 2 or with the exemption status.

6.0 Management objectives

- Objectives set out the detailed steps to be taken to implement the undertakings and the HMP aims.
- Complex properties may need more than one objective for any given feature/area/interest including general and specific objectives, whereas other plans may achieve good management with a few simple objectives.
- Try to make sure that objectives are SMART: ie
 - S**pecific (to the purpose of the HMP and to the feature/area/interest, eg does the objective achieve the aim? Will it comply with the undertakings? Does it address the relevant management requirements?)
 - M**easurable (to help monitor progress)
 - A**greed (with the relevant Agencies)
 - R**ealistic (don't set impossible goals)
 - T**imetabled (by reference to the detailed work programmes in section 8).

OBJECTIVE 1: General

All management should be to the highest standard possible. This is important in all parts of the designated property and particularly so in relation to the management of features identified in section 3.3.

OBJECTIVE 2: Historical understanding and significance

The Historical information and features of significance will be consulted and taken into account before any significant work is undertaken within the estate or any significant amendment is made to the plan.

The history of the area (as summarised in section 2.5 and set out in Appendix 10), together with archaeological information, the tree survey and an inspection of the park have led to an understanding of the way in which the area developed and have all been taken into account when identifying the features of significance in section 3. It was essential to use these sources when preparing this plan, and it will also be necessary to refer to the history and archaeological information when implementing, amending or updating it. Proper regard will be paid to historical information about any feature or aspect in order to ensure that whatever is done respects and conserves its significance.

OBJECTIVE 3: Changes to the plan.

Any change to the plan should be checked according to the following:

- Does the proposal enhance the environment? The change may be made if there are clear environmental benefits which fulfil the aims and objectives of the plan and the conservation priorities.
- If the change does not enhance the environment, does it have a neutral impact? The change may be made if it does not conflict with aims and objectives of the plan and conservation priorities. The change must be carefully assessed and improved as much as possible.
- If the change has clear environmental disbenefits it should not be made unless there are exceptional circumstances when it may be essential to proceed with such a policy. In this case it must be improved as much as possible. Any change with environmental disbenefits must be documented by a statement setting out its disadvantages and why its inclusion is essential. It should be carefully reassessed at each review of the plan and deleted if at all possible.

OBJECTIVE 4: Buildings and structures - overall management objective.

To maintain, repair and preserve the features of Northanger Abbey and associated ruins as identified in section 3 of this plan.

OBJECTIVE 5: Buildings and structures - condition

To bring the buildings up to a standard of repair agreed with English Heritage (for Grade I and II* buildings) and the local planning authority Conservation Officer (for all listed buildings) which arrests, as far as possible, the current rate of deterioration and thereafter to maintain them to that standard.

OBJECTIVE 6: Buildings and structures - maintenance and repair methods

To maintain and repair the buildings in a manner which conserves their character and features by:

- following conservation principles of minimal intervention;
- retaining architectural details when repairs are carried out;
- matching traditional materials so far as possible; and
- redecorating at intervals appropriate to achieve Objective 5 as agreed with the relevant authorities.

OBJECTIVE 7: Buildings and structures - timing and monitoring

To carry out the works programme set out in 8 below and Appendix 16: Buildings Repairs Plan. To carry out with the estate's architect an annual inspection and review of the vulnerability assessment in 7 below and the Baseline Condition Report in Appendix 15. To carry out a quinquennial fabric inspection of the listed buildings. To use the results of the inspections to determine the repair priority for the next year.

OBJECTIVE 8: Historic Parkland

To conserve by good management the designed historic landscape, in a manner that retains the distinctive character of each of its features and areas, its amenity land and the setting for the Abbey.

OBJECTIVE 9: Chattels (historically associated objects)

To retain the historically associated chattels in the Abbey displaying them in rooms normally open to the public, maintaining them in good repair and, where necessary, managing the environment of the rooms in which they are located.

OBJECTIVE 10: Tenants

All existing tenants will be made aware of the heritage status of the property and the management objectives in this plan. The estate will use its best endeavours to ensure that all tenants and licensees comply with these objectives.

Before granting any new tenancy or licence, the estate will ensure that the prospective tenant or licensee agrees to be bound by a restrictive covenant that accords with all parts of this management plan that are relevant to their intended occupation of any land or buildings.

OBJECTIVE 11: Consultation on proposed change or development

In addition to the need for any statutory consents (including those under the Town and Country Planning Acts, Listed Building and Scheduled Monument legislation), not less than one month's prior written notice will be given to the Countryside Agency, English Heritage and English Nature (as relevant) for the following works within the exempt area if the works would affect its significance:

- the demolition of the whole or part of any significant building or structure;
- all significant new building or engineering works¹;
- alterations to any significant building or structure;
- any significant change of use²;
- the sale or disposal of any historic maps, plans, documents or other archive material which in any way contributes to an understanding of the designated heritage property (so that the relevant Agency can make arrangements for copying the material if necessary)
- the amendment or review of any plans which are required to accord with the objectives of the HMP (eg Woodland Grant Scheme); and
- any departure from the aims or other provisions of the HMP.

OBJECTIVE 12

To notify Inland Revenue of the sale or disposal of any part of the property.

7.0 Specific Objectives relating to condition

- Describe the feature, referring to supporting information.
- Summarise condition (cross-referring to detailed baseline condition report Appendix 15).
- Summarise current management practice.
- Assess the potential vulnerability of each of the significant features or aspects and state what is required to retain its heritage qualities (ie its significance).
- Set objectives, identifying the work necessary to meet mandatory requirements to maintain and preserve the outstanding land or maintain, repair and preserve the outstanding buildings including any work required to bring the quality of the exempt property up to the required standard.
- Clearly identify any works proposed that are over and above the requirements of the undertakings as **voluntary enhancement**.
- Check each objective with HMP sections on history, assessment of significance and management issues and with other objectives using the 'conservation questions' approach (see page 13), to ensure cross-compliance.
- Where necessary, set out the steps to be taken to resolve any potential conflict between objectives including a brief summary of the reasons for decisions.

¹ including agricultural and forestry buildings and farm and estate roads and fences.

² including any agricultural improvement or intensification or forestry operation that would affect the scenic or other qualities of the exempt property.

Current condition

The Abbey

The junction between the neo-classical front and the mediaeval rear of the dwelling has been a constant repair problem in recent decades, and probably since the last major alterations in the late 18th century. This has been made worse by the fact that maintenance of the complicated roof structure (a series of flat roofed areas and valley gutters combined with a pitched slate roof behind a parapet) has been neglected in the past. In addition, exposed areas of Abbey masonry, in places several feet thick, have become water porous. Recent repairs to the roof leadwork and attention to the masonry (grant aided by English Heritage) have prevented further deterioration of the main roof timbers and the internal plasterwork and decoration in the second floor bedrooms. A programme of repairs to the roof timbers, internal decoration, external render and windows is required. The detailed baseline condition is set out in Appendix 15: Baseline Condition Report.

Abbey ruins

The Abbey ruins were stabilised in the 1960s using cement mortar which has resulted in serious spalling of the masonry. Lime mortar will be used for any further stabilisation works.

The South Lodge

The South Lodge is in generally sound condition and currently requires only routine maintenance and redecoration.

Walled kitchen gardens and hothouses

The walled kitchen gardens and hothouses are in poor condition. The brick walls of the kitchen garden show signs of deterioration, with blown faces to the brickwork and extended cracks through their structure. The timber of the glasshouses is in poor condition and there are many missing panes of glass.

The Park

The parkland was subdivided by fencing in the 1960s which adversely affects the design intent of an open, rolling, grassy parkland. The permanent pasture is grazed by sheep except for the enclosure near South Lodge which is kept free of sheep from end of March until mid-September to provide an area for events. The adjacent enclosure is used for car parking associated with events, and is therefore subject to spiking, to relieve compaction, and oversowing at the end of September each year.

Veteran oaks

The veteran trees experienced major die-back in the drought of 1998 and display significant stag-heading, but have subsequently rallied. Dead wood is left in the canopy except where the tree is adjacent to areas of public access, such as the drive or South Lodge. No new trees have been planted in the park since 1939.

Shrubberies

The shrubberies comprise tall, overgrown evergreen and deciduous shrubs. There are no ornamental herbaceous plants any more although it is known that hyacinths were a feature of the pleasure grounds at the time of Jane Austen's visit. The path is narrow and overgrown and is currently an earth track, but is believed to have been originally constructed in self-binding gravel.

Current management

The Abbey

Following his father's death, Northanger Abbey has become the home of Mr. Henry Tilney and his family. One member of staff is employed - on a part-time basis (3 days a week) - in general buildings maintenance duties. He is responsible for minor internal and external works to the Abbey and all other non-agricultural buildings on the estate, including carpentry and painting. Major works such as roof repairs and specialist work such as conservation of the silk wallpaper are carried out by contractors under the supervision of Mr. Henry Tilney.

The Abbey ruins

The Abbey ruins are managed to stabilise their condition and present the ruins so that their relationship with the standing part of the Abbey may be understood.

South Lodge

South Lodge is let on a shorthold tenancy.

Walled kitchen gardens and hothouses

The walled kitchen gardens are in hand and used for growing organic herbs, fruit and vegetables.

[Similar details required of the management arrangements for the shrubberies, park, woodlands and Home Farm.]

Vulnerability and maintenance requirements

Mandatory requirements

The Abbey

The Abbey is in need of further leadwork replacement to its roof and repairs to structural timbers supporting both the flat and pitched roofs. Further internal redecoration is required, particularly to rear (north) and second floor rooms following the completion of the first phase of major roofing and penetrating damp repairs.

A fire control and management procedures guidance note is required and will be prepared in consultation with the Fire Service and English Heritage. The consultants to be used are to be agreed with English Heritage prior to the commencement of the work. The recommendations of the guidance note will be implemented as soon as possible.

The Abbey ruins

An ongoing programme of maintenance is required to prevent the ruins deteriorating further, including where necessary the removal of cement mortar and replacing with lime mortar. The setting of the Abbey ruins in a lawn will be maintained.

South Lodge

The South Lodge is generally in good order and only requires routine maintenance such as external redecoration every 5 years.

Walled kitchen gardens and hothouses

The walls and hothouses are in poor condition and require urgent attention to ensure that lengths of wall do not fall down and that further glass is not lost from the hothouses.

In view of their special significance, a separate specification, schedule of works and cost estimate will be prepared for the repair of the kitchen garden glasshouses and opportunities for funding will be investigated.

The Park

The permanent pasture (coloured green on Map 5) will not be ploughed.

The Chattels

The importance of the books has already been mentioned. The older books show signs of use and age, particularly those in the 18th century part of the collection which generally have cracked spines, damaged covers and foxed pages. They are vulnerable to high levels of humidity in the library and to further deterioration from handling by researchers and members of the family. The furniture and pictures are in generally good order but the light levels in the rooms where they are displayed will be reduced.

The exempt chattels will remain in rooms open to the public. Book conservation and humidity control measures are in the process of being investigated. There is a potential fire risk problem. A special report is being commissioned to address this issue

Voluntary enhancements

Walled kitchen gardens and hothouses

Future proposed works include the erection of new visitor facilities in the walled kitchen garden which are considered to be appropriate in this location. The design and siting of the facilities will be discussed and agreed with the Countryside Agency or its agents and English Heritage prior to the start of any work.

The Park

The restoration work detailed in Appendix 18 - Northanger Park Planting Proposals and Management Prescriptions will be completed.

Ancient trees will be retained as long as possible, using tree surgery where necessary in areas of public access, and felled only where essential. A proportion of dead wood, standing or fallen, will be retained for wildlife conservation where doing so does not detract from Objective 8. Replacement trees will be planted in places where losses have occurred, retaining, as far as possible, historic groupings of trees especially on the knolls.

The fencing alongside the carriage drive and within the parkland will be removed.

The Shrubberies

The path and ornamental planting of the shrubberies will be restored in consultation with English Heritage by:

- carrying out ground investigation of the shrubberies path to establish its exact width, location and materials;
- restoring the shrubberies path to its 18th century design;
- researching the 18th century planting of the shrubberies;
- planting the shrubberies with appropriate ornamental plantings reflecting known information for Northanger Abbey grounds in the 18th century.

The Chattels

Scanning of the most frequently requested books to create a virtual library for research is under consideration.

8.0 Work programmes

- Proposed work programme(s) for the first five-year plan period
- Longer term work programme(s), eg over 25 years including both fairly firm proposals, such as agreed works set out in a Forest Plan, and more tentative aspirations
- Regular routine maintenance tasks, eg window painting cycle
- ‘One-off’ tasks, eg major repair to building, construction of visitor centre, restoration of Victorian planting scheme (don’t forget to allow for subsequent routine maintenance or regular refurbishment)

Key * minor works/costs
 ** major works/costs
 *** very major works/costs
bold type: mandatory requirements
 regular type: voluntary enhancements

25-Year Work Programme

Item	2004-08	2009-13	2014-18	2019-23	2024+
NORTHANGER ABBEY GROUNDS					
Major repairs to Northanger Abbey	***				
Book conservation works	*	*			
Major repairs to glasshouses and kitchen garden walls		***			
Implement new visitor centre			***		
Planting of shrubberies	**				
Parkland planting	*	*	*	*	*
NORTHANGER HILLS ...etc.					

5-Year Maintenance Plan – Work Programme for initial 5 year period

Item	2004	2005	2006	2007	2008
NORTHANGER ABBEY AND PARK					
Carry out major repairs to the buildings and structures as scheduled in Appendix 16: Buildings Repairs Plan	***	***	***	***	***
Quinquennial inspection of listed buildings by qualified person(s)					*
External redecoration of Northanger Abbey			*		
Implement fire control and management procedures		**			
Implement book conservation works	*	*	*	*	*
Tree surgery to parkland trees along public highway, carriage drive, historic pedestrian routes and adjacent to buildings	**				
Prepare spec and schedule for glasshouses repairs, investigate funding		*	*		
Resurvey the fabric of the buildings in the exempt area					*
Plant replacement parkland trees	*	*	*	*	*
Remove sub-dividing fencing from parkland	*				
Investigate shrubberies path and agree restoration proposals with English Heritage			*		
Restore shrubberies path				**	
Research shrubberies planting			*	*	
Agree shrubberies restoration planting proposals with EH				*	
Carry out shrubberies restoration planting					**
Submit design of new visitor facilities to CA and EH					*
NORTHANGER HILLS ...etc.					

NB cross refer to Appendix 19: Financial Plan.

Schedule of Annual Maintenance and Inspections

Item	Spring	Summer	Autumn	Winter
Maintenance of buildings and structures	*	*	*	*
Inspection and risk assessment of walls, gates, gate piers	*			
Inspection and risk assessment of parkland trees		*		*
External redecoration of buildings other than the Abbey (rolling programme)		*	*	
Parkland replacement tree planting (rolling programme)				*

9.0 Monitoring and review

- Statement of requirements in relation to annual meetings, monitoring, plan reviews and access by statutory Agencies.

Reporting compliance with the Heritage Management Plan.

Annual meetings

Annual Meetings will be held from twelve months after the approval of this plan between Henry Tilney, the Countryside Agency, English Heritage, English Nature, or their agents, and whoever else they jointly agree to invite.

The owner will prepare an annual report (on a topic-by-topic basis) of activity within the heritage area, including a record of public access, and circulate it with the agenda in advance of meetings.

In cases where there has been partial compliance, details will be given of the position together with an explanatory statement setting out whether full conformity is anticipated in future years and, if not, what can reasonably be achieved. Any work not completed in its designated year will be carried forward to the next year and an appropriate programme adjustment made.

The meetings will review the implementation of the management plan including compliance with its aims and objectives and the yearly programmes of work. The minutes will report on conformity with the plan and record the progress made in implementing the works and other items in it. Copies of the report and minutes of the annual meetings will be sent to Inland Revenue Capital Taxes within one month of the date of the meeting.

Monitoring checks may be made each year at the annual meeting as part of the review and the findings will be recorded in the minutes of the meeting.

Review of the Heritage Management Plan

The content of this plan is to be reviewed every 5 years. All modifications or additions should be checked to ensure they comply with objective 3.

Access by statutory Agencies

The owner agrees that any person authorised by the Countryside Agency, English Heritage or English Nature, may at all reasonable times and on reasonable notice, enter and inspect the property by appointment to check that the management plan is being implemented and that no breach has occurred.

10.0 Appendices and maps

Appendix 1

Undertakings under section 31, Inheritance Tax Act 1984

- 1 I, **Henry Tilney**, as beneficial owner of property (“the Property”) comprising
 - the Grade I listed building Northanger Abbey
 - the land surrounding it and outlined in green (“the Green Land”) on the attached map (“the Map”) and
 - the land outlined in blue (“the Blue Land”) on the Map
 and of the chattels (“the Chattels”) in the attached schedule (“the Schedule”)

have applied for designation under § 31(1)(b), (c), (d) and (e), Inheritance Tax Act 1984 (“the 1984 Act”) for the purpose of claiming conditional exemption under §30 of that Act, in relation to the death of Col. Tilney on 3rd May 2002.
- 2 In this document which, together with the Map, the Schedule, and the Heritage Management Plan (“the HMP”) referred to below, is referred to as “the Undertaking”, I undertake as follows.
- 3 I undertake with respect to the Property and each of the Chattels that during my lifetime or until any earlier disposal whether of all or any of the Property or of all or any of the Chattels or both, whether by sale or gift or otherwise:
 - a To take the following steps for maintenance repair and preservation:
 - i Within X months after the date of designation to prepare the HMP in accordance with the current edition of “Preparing a Heritage Management Plan” in consultation with and to the reasonable satisfaction of the Countryside Agency, English Heritage and English Nature (“the Agencies”).
 - ii To take the steps set out in the HMP for the maintenance repair and preservation of Northanger Abbey, the Green Land and each of the Chattels having full regard to its historic and architectural interest of Northanger Abbey. This will include steps where necessary:

- to eradicate any dry and wet rot and any major beetle infestations;
 - to repair roofs and rainwater goods in permanent and suitable materials;
 - to repair stonework and brickwork in appropriate materials insofar as repairs are necessary to protect the fabric of the building;
 - to repair and repaint or treat external woodwork;
 - to carry out repairs necessary to maintain the historic interiors; and
 - to carry out any conservation repair necessary to the Chattels and keep them in an appropriate environment.
- iii To take the steps agreed and set out in the HMP to maintain the Blue Land and preserve its character including contributing buildings and monuments and to meet all relevant statutory requirements with respect to them.
- iv In addition to obtaining any statutory consents to consult the Agencies over proposals for the following works within the Property where such works may affect the fiscal designation status:
- the demolition of the whole or part of any outstanding or contributing building or structure;
 - all significant new building or engineering works;
 - significant alterations to any outstanding or contributing building or structure;
 - any significant change of use;
 - the significant amendment or review of any plans which are required to accord with the HMP, and any significant departure from its aims or other provisions.
- v To review the HMP with all or any of the Agencies at intervals of five years or thereabouts and to revise and update its prescriptions insofar as may reasonably be necessary and consistently with the relevant Agency's current guidance.
- vi To keep each of the Chattels at or otherwise associated with Northanger Abbey and, where necessary managing the environment of the rooms in which they are located.
- vii To maintain the existing network of public rights of way on the Green Land and on the Blue Land.
- b To take the following steps to secure reasonable access to the public:
- i To provide access to the exterior and the principal rooms of Northanger Abbey and access to the Abbey ruins and gardens on 28 days each year ("the access days") between Easter and the end of September including weekends and bank holidays.
 - ii To display each of the chattels on the access days in a room open to the public. Where the books in the Library are concerned this will amount to viewing their spines on the shelves. Access to the contents of each book will be available only by prior appointment and under properly invigilated conditions.
 - iii To notify Inland Revenue Capital Taxes ("IRCT") of the access days for each forthcoming year no later than the end of the preceding October.
 - iv In addition to access via existing public rights of way, to provide permissive footpaths open from [date] to [date] every year. These paths will run along the southern carriage drive through Northanger Park from South Lodge for 250 metres northwards. Then across the park northwest for 100 metres to enter Northanger Woods SSSI for 300 metres, emerging to run westwards across Home Farm Meadows for 500 metres before joining public footpath FP8. This is shown by the green dotted line on the Map.
- v To publicise access by:
- erecting and maintaining a notice board at the entrance to the property including a map of the permissive paths and public rights of way;
 - posting an entry in a publication of national circulation, such as **Historic Houses, Castles and Gardens** or **Hudson's Historic Houses and Gardens**;
 - notifying VisitBritain of the arrangements.

- c To take the following steps to publicise the terms of the Undertaking:
 - i To allow reasonable details of the arrangements, including where and when access without a prior appointment is available, to be published by the Inland Revenue (“IR”) on its website, or in any successive publishing medium, and via any other appropriate website and in any other reasonable manner it sees fit.
 - ii To provide, at reasonable cost, a copy of the Undertaking, without personal particulars, to any member of the public who requests it.
 - iii To provide details to local tourist information centres of the arrangements for access on the access days.
 - iv To provide IRCT with details of a person or firm the public and curators can contact with a view to arranging visits, appointments and loans, and obtaining further particulars and keeping IRCT informed of any change in these particulars.
- 4 I will send an annual report to IRCT, at or around the time of the anniversary of the date of designation, or such other date as we might from time to time agree. This report will give details of the year’s action to maintain, repair and preserve the property and of the record of public access.
- 5 I will notify IRCT immediately possession of the property is relinquished whether by sale, gift or otherwise, and of any change to any relevant circumstance.

I have read the attached Notes to the Undertaking which do not themselves form part of this undertaking.

Signed

Henry Tilney

On (date)

[Further appendices: Appendices in contents list to be included]



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