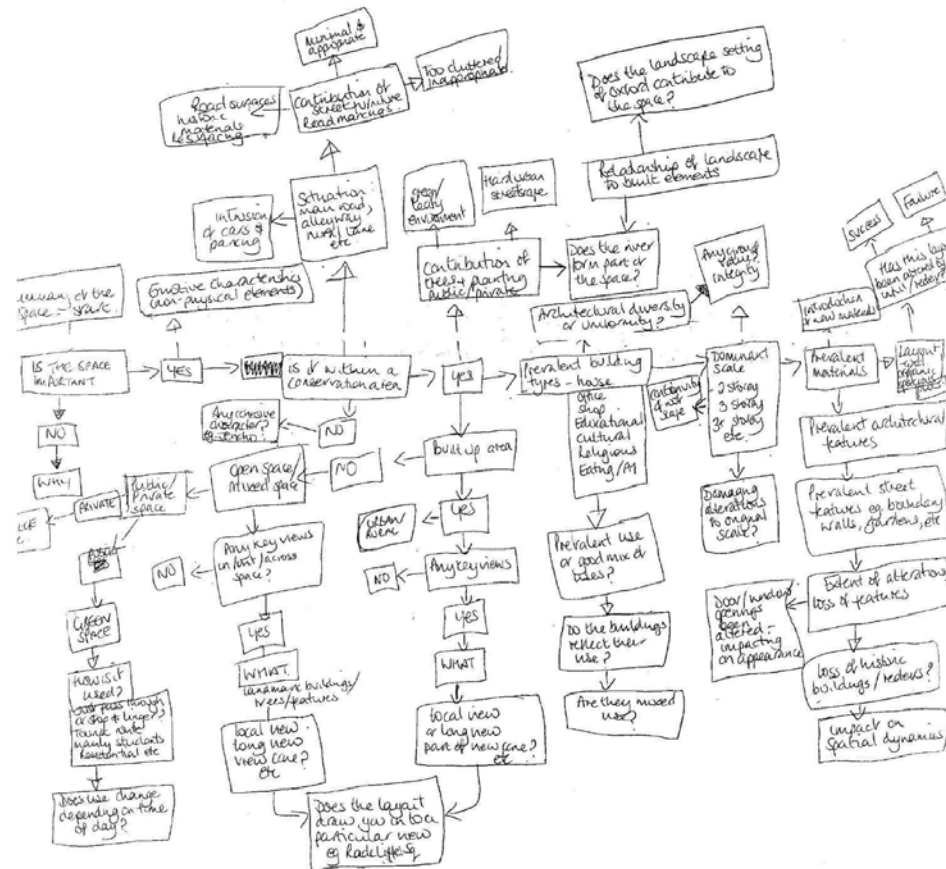


How we developed The Oxford Character Assessment Toolkit



Origins of the Character Assessment Toolkit

Background

The Toolkit was developed in response to a need to improve the robustness of assessments of character that inform planning decisions.

It will be used to enhance the assessments made by a number of participants in the planning process including developers, council officers and members of the public.

This is a means of improving understanding and awareness of character.

A pilot study to develop the Toolkit was funded by English Heritage as a Capacity Building Project.

Oxford City Council worked in collaboration Oxford Preservation Trust as well as other community groups, including the Oxford Civic Society and Oxfordshire Architectural and historical Society.

The project's brief was:

"... A pilot study to develop a robust checklist of indicators (or 'metrics') that will enable planning and other professional staff and lay people (including councillors) to identify key elements that contribute to forming character and to measure the significance/value of a Conservation Area that will be based on a robust methodology. The study will be written up and disseminated as best practice to other local planning authorities and interest groups partnerships."

Origins of the Character Assessment Toolkit

Reasons for Project

Planning Policy

- Changing policy framework
- Statutory requirements
- Absence of character assessment guidance

Planning Practice

- The need to effectively manage change
- A lack of historic analysis in planning decisions can lead to a misunderstanding of heritage assets
- Potential conflict between development and the desire to conserve our heritage

Economic Pressure

- High level of economic activity in the city
- Development pressure

Perception

- Belief that Oxford was changing beyond recognition

Community

- Enable community involvement
- Enable the articulation of opinions on development and conservation projects

Skills

- Improve understanding of heritage issues
- Enable interaction with the planning process

Evidence base

- To inform the planning process
- To protect historic assets

Project Setting/Environment

Oxford's Historic Environment

Oxford is a unique city. Elements of its built environment can be traced back over one thousand years. There is great depth to the City's built heritage. Designated heritage assets in the city include:

1580 Listed Buildings

11 Scheduled Monuments

11 Registered Parks and Gardens.

17 Conservation Areas covering nearly 20% of the city's area

This volume of heritage assets creates significant pressures on the local authority's planning and heritage services as they seek to address conflicts between conservation and the need for new development.

Proportion of listed buildings	Oxford	National Average
Grade I	12.2%	2%
Grade II*	7%	4%

Policy and Targets

Policy Framework

There has been a trend in planning and conservation policy to move decision making from a relatively rigid framework of prescribed measures to a more considered and reasoned approach to justify change based on research and evidence. This is exemplified by English Heritage's Conservation Principles and the move from PPG 15 & 16 to PPS5 Planning for the Historic Environment.

However, this move to a more evidence based system has not been accompanied by guidance as to how evidence should be gathered. This project should therefore produce a framework that can gather evidence on the character and significance of an area in order to assist the decision making process.

Within Oxford, the Toolkit will need to support the Oxford Local Plan, Conservation Area Appraisals and any future local policy framework such as the forthcoming Oxford Heritage Plan.

Capacity Building Targets

The project met English Heritage's targets of promoting best practice standards and skills for professionals and local communities to better understand the historic environment and make more informed assessments and realistic management plans.

The framework established by the Character Assessment Toolkit will be usable across the region by other local authority/amenity group partnerships.

The toolkit project adds to the capacity and commitments of local communities to champion the conservation and enhancement of their own local environments.

The toolkit project promotes best-practice standards and skills for the conservation, documentation, interpretation and sustainable enjoyment of the resources of England's historic environment.

Aims and Beneficiaries

Aim of the Project

The aim of the project was to produce a framework to:

- Identify character
- Assign significance
- Assist evidence gathering
- Enable understanding
- Be open to all
- Enable communities
- Be usable in any area

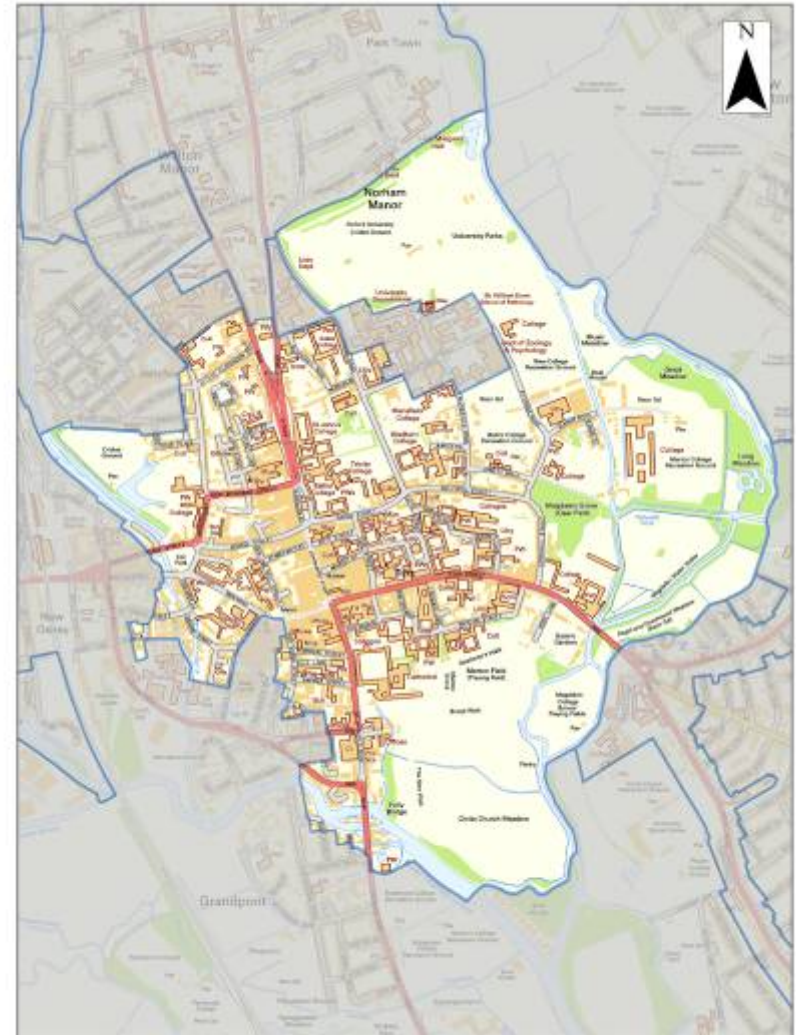
Beneficiaries

The toolkit should help a range of users:

- Planning staff
- Elected members
- Architects
- Planning consultants
- Built environment specialists
- Developers
- Building Owners
- Homeowners
- Individuals
- Amenity groups

The Study's Trial Area

The project was developed and trialed in the Central (City and University) Conservation Area (Fig. 1) The area was chosen both because it is deeply historic and because it has a wide range of modern developments and a wealth of features which inform and test the project design.



The Study Area: Oxford Central Conservation Area

Scale: Not to Scale

Setting up the project

Stakeholders and Oversight

The project was driven by three partners;

- English Heritage (EH),
- Oxford Preservation Trust (OPT) and
- Oxford City Council (OCC).

All the partners contributed both financially and intellectually. A steering group made up of the three partners was established to define the initial parameters, as well as providing oversight and a sounding-board for ideas. Direct administration of the project was undertaken by Oxford City Council where a dedicated officer post was created for the project.

Working Group

A working group was created to pilot the toolkit and provide feedback. The working group would consist of members of the Civic Society, Oxford Preservation Trust, Oxford Building Record and Oxford University.

Research

A prerequisite of the project was a thorough review of existing law, guidance and literature.

The literature review took a multidisciplinary approach with texts and ideas drawn from:

- Landscape Character Assessments
- Urban Design
- Architecture
- Building Conservation
- Heritage
- Archaeology
- Selective attendance to seminars and conferences also took place to reinforce core skills and knowledge.
- Initial ‘inspiration’ surveys of the Central Conservation Area were also undertaken.

Developing a toolkit: First steps

Initial Phase

Key Headlines

- Identification of character features
- Initial 'test drive'
- Production of questionnaire to move to pilot study

As a precursor to formulating a framework, it was necessary to make a number of assumptions about who would use the Toolkit.

Thought web

The initial thought process and discussions resulted in a 'spiders web', a loose diagrammatic framework of the information that needed to be gathered to assess the qualities and values of a place (Fig 2).

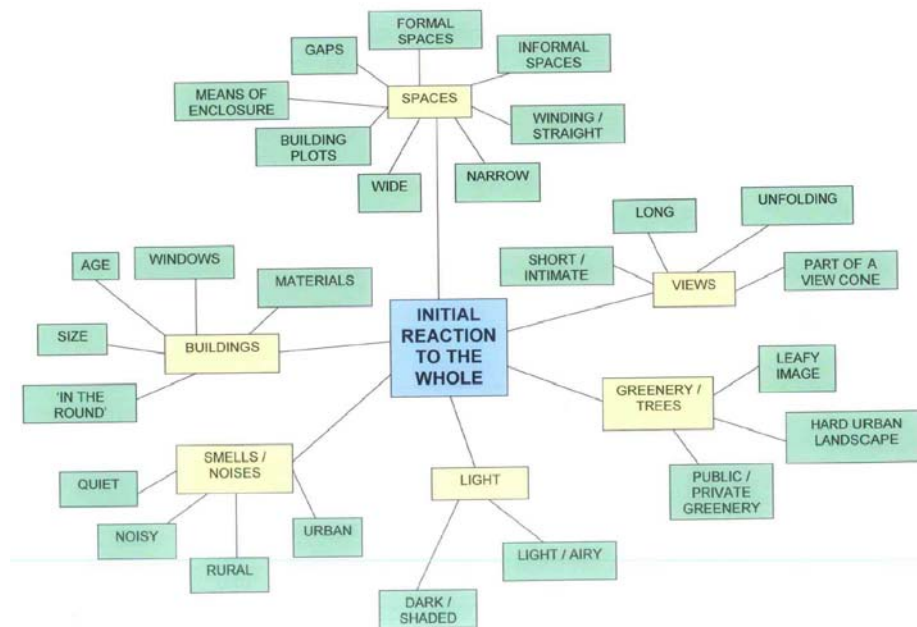


Developing a toolkit: First steps

Ordering the thoughts

The next stage was to form a more orderly 'spider's web' where character indicators were sorted into 'families' (Fig. 3).

This gave structure to further thought and discussion about features of an area or building that need to be taken into consideration when making an assessment of value, significance and contribution. Informal surveys of the Central Conservation Area were undertaken to provide further inspiration to the process. The resulting lists, while not exhaustive, incorporate the major elements that should be considered in assessing the character of an area in the majority of instances.



Developing a toolkit: First steps

Creating a survey form

This in turn led to a flow-chart question process, taking each element identified in the spider's web and asking **“is the contribution that the feature makes to the overall character of the area good or bad?”** against each feature.

INITIAL REACTION	CONTRIBUTION			COMMENTS	NUMERICAL VALUE -5 to +5	
	POSITIVE	NEUTRAL	NEGATIVE		-	+
Buildings						
Spaces						
Views						
Light						
Greenery						
Noise						
Use						
Smell						
Other						
SPACES	POSITIVE	NEUTRAL	NEGATIVE	COMMENTS	NUMERICAL VALUE -5 to +5	
					-	+
Formal spaces						
Informal spaces						
Gaps between buildings						
Means of enclosure						
Building plots						
Widelopen						
Narrow/enclosed						
Winding/straight						
Relationship to built elements						
Quality of public realm						
Use						

Developing a toolkit: Stage 2

Pilot 1

The first meeting of the working group was held on the 7th October 2008. Following an introduction to the project members of the working group were allocated streets to survey within the Central Conservation Area. Two surveyors were assigned to each street so that their results could be compared.

Feedback from Working Group

The process made individuals consider their historic environment in more detail.

- Maps were provided for directions but proved very useful to annotate comments on.
- Initial reaction section needs to allow for general comments.
- Questionnaire was more complicated than necessary.
- Confusion as to what the questionnaire was asking.
- Tick boxes only useful in conjunction with text
- Guidance notes needed to explain terminology.
- The use of photographs to illustrate features would help
- The questionnaire implies that all features contribute equally to character

Lessons Learnt

The initial design was compromised by the professional knowledge of the designer. Do not assume that because a professional understands the concepts that a non-professional will.

Surveys are analysing forms and spaces. Other tools that help describe forms and spaces, such as maps and photographs, greatly simplify the analytical process.

The need for both tick-boxes and quantitative scoring is open to question.

While the features that contribute towards character have proved to be robust. There is a need to find out the which features in a particular space have a greater influence on that places character.

Developing a toolkit: Stage 2

'Toolkit' Project - Draft Guidance Notes

Outcomes

As a result of this first workshop we produced guidance notes for people filling in the questionnaire. These included:

- Explanation of the Toolkits purpose
- Text description of character features
- Photo illustrations

We also redrafted the questionnaire

- Removing the neutral tick box
- Including a comments section for the initial reaction

We decided to provide maps for future pilot tests

And we assessed the use of tick boxes and the issue of hierarchy in second pilot stage

The Oxford Character Assessment Toolkit



1. Introduction

Oxford City Council has a statutory duty to have special regard to the preservation and enhancement of the historic environment when it considers proposals for change. It strives to ensure that decisions are based on an informed analysis of the significance of a heritage asset and has embarked upon a programme of appraisals for its 16 conservation areas. This work is matched by an identified concern from local residents and amenity groups that the ever increasing pressure for change is threatening the special character of Oxford eg. unlisted buildings, substantial rear gardens and corner plots, trees, the subdivision of properties, streetscape etc are all elements that are vulnerable.

ii. Street furniture

Street furniture can enhance or detract from a place. Ideally, the pieces should be kept to a minimum, be of an appropriate design and be placed in a position that will not cause harm to either the user or the streetscape. In addition to the modern additions to street furniture there may also be some traditional examples which add a further element of character and history to an area eg. [lamp](#) columns, boot scrapers, metal kerbs, railings, historic post boxes etc.



iii. Road markings and traffic management

Poorly integrated traffic management systems can threaten the character and appearance of a streetscape. The cumulative impact of signs, road markings, speed bumps, road islands etc can damage the visual amenity of an area as well as its usability and may prove a discouragement to people using the space.

Developing a toolkit: Stage 2

We also redrafted the questionnaire

- Removing the neutral tick box
- Including a comments section for the initial reaction

We decided to provide maps for future pilot tests

And we assessed the use of tick boxes and the issue of hierarchy in second pilot stage

SPACES	NEGATIVE	POSITIVE	COMMENTS	NUMERICAL VALUE -5 to +5	
				-	+
Formal spaces					
Informal spaces					
Gaps between buildings					
Means of enclosure					
Building plots					
Wide/open					
Narrow/enclosed					
Winding/straight					
Relationship to built elements					
Use					
Paving materials					
Street furniture					
Impact of traffic					
Usability					

Developing a toolkit: Stage 2

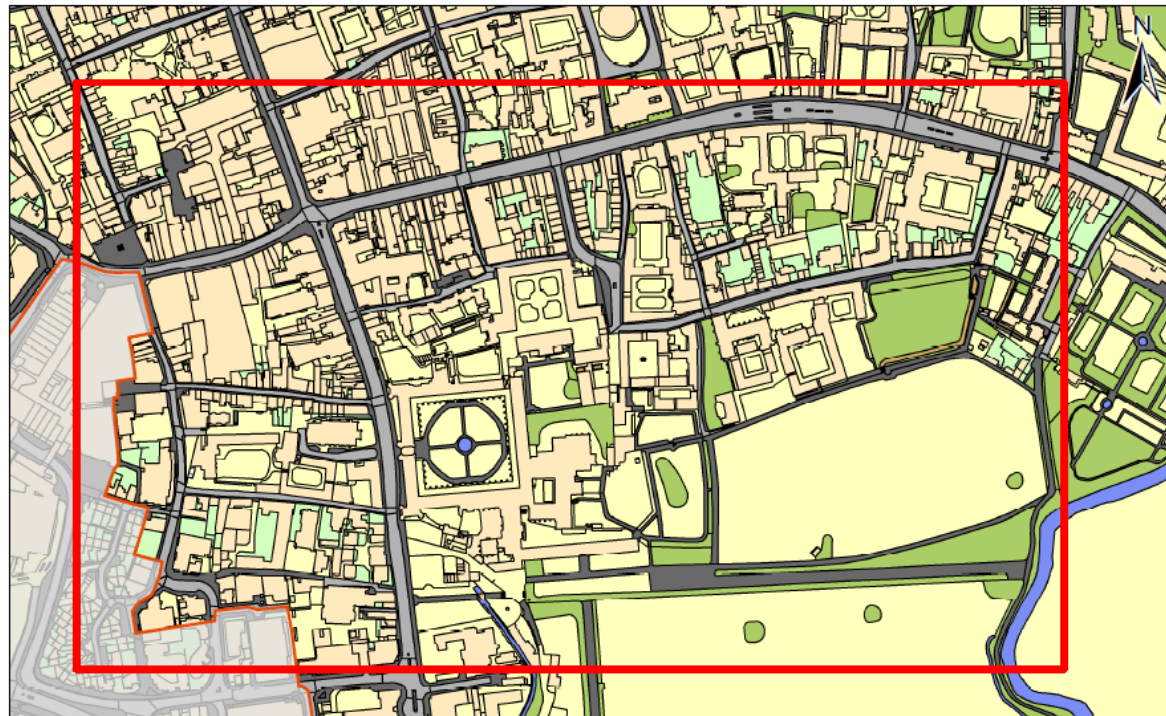
Pilot 2 Key Headlines

Importance of language to make the Toolkit accessible

Scoring is controversial but necessary

Establishment of a hierarchy of features

The Working Group was assigned new streets to survey and reconvened on the 16th of January 2009 to discuss their views.



Character Assessment Toolkit Pilot Study 2 Area

Scale: 1:3,500

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Ordnance Survey 100019348.

Developing a toolkit: Stage 2

Feedback from Working Group - General

- **Language** – in guidance needs to be more open to non-cognates and not planning orientated.
- **Glossary and detailed definition of key terms** – needed as part of the guidance.
- **Confusion over scoring** – some participants felt it was too subjective
- **Proforma questionnaire** – incorporate into the guidance notes
- **Images** – required to illustrate guidance.
- **The guidance is not an exhaustive** - Need to qualify this in the guidance, for e.g. features and materials may only provide examples.
- **Hierarchy of features** – request for this to be taken into account
- **Remove tick boxes from the survey.**
- **Cover sheet needed** - listing details of:
 - Surveyor
 - Street
 - Time of day
 - Weather conditions



Developing a toolkit: Stage 2

Feedback – in detail

Language – The concern regarding language has raised interesting issues as to how an acceptable level of planning and architectural terminology can be achieved. This needs to be understood without the text losing meaning or becoming too wordy.

The toolkit is intended to encourage all sectors of the community to enjoy and care for the historic environment by developing a more informed understanding of its parts. It is for both professionals and non-professionals and children will be encouraged to be involved as part of their curriculum studies and therefore the language has to be understood by all sectors of the community.

The interpretation of certain words was questioned, as well as the complexity of the language. Heritage and planning specialists we use certain words on a daily basis and do not question what is meant by them. However, outsiders may have a different understanding of their meaning. For example, the word ‘space’ had been used in different contexts to explain the area between built elements e.g. a road, or to a whole place (buildings and gaps) or in asking questions ‘how does the view contribute to the character of the space’ where space has a general meaning.

Glossary – This is particularly necessary where one word can be interpreted in different ways and an alternative word has been used to avoid confusion.

Confusion over scoring – The scoring is subjective, but how an individual values something is subjective. Gathering the evidence of such subjective experiences is necessary to find out how heritage assets are valued by the local community. It adds greater weight to the Toolkit being an analytical tool rather than purely a descriptive framework

Using maps – The annotation of features on maps by the surveyors added the production of a visual element to the description of character, rather than a purely textual description. This visual element enables a clearer and more concise description of character to be produced. It also allows for the changing physical footprint of a place to be recognised without detailed description.

Outcomes

- Language simplified in the guidance notes.
- Descriptions in guidance explained further.
- A ranking system was introduced to enable the character groups to be listed in order of importance for the assessment place or area.
- Glossary of key terms produced.
- Tick boxes removed
- Cover sheet introduced

Developing a toolkit: Stage 2

Example of updated survey sheet

SECTION 2: THE SURVEY

1. 'INITIAL REACTION'

The initial reaction is a quick summary of what you see when you first enter the space. Each of the elements requires a tick in the 'Negative' or 'Positive' boxes, a brief comment of how you initially perceive the feature to contribute to the space and allocate a figure between -5 and +5 to its contribution. The last column enables you to rank the importance of the features that make up the character of the space.

INITIAL REACTION	COMMENTS	NUMERICAL VALUE - 5 to +5		RANKING 1-9
		-	+	
SPACES				
BUILDINGS				
LONG/SHORT VIEWS				
LIGHT/DARK				
SURFACES				
GREENERY				
USE				
NOISE				
SMELL				
GENERAL COMMENT				

DEFINITION OF TERMS

- Spaces** What is the space? A space is the gap between buildings including streets, squares, forecourts, parks and open green spaces.
- Buildings** Are there buildings in the space? How do they contribute to the space? Eg. Is it an urban street with buildings forming a continuous frontage down either side of the road eg. Commarket or is the space much more open in character with only a few buildings.
- Long/Short Views** When standing at the approach to the space or within the space itself, what can you see? Is there a long view that takes in the full extent of the space eg from one end of Broad Street to the other or due to the layout of the space, only short views are possible eg. New College Lane/Queen's Lane.
- Light/Dark** Is the space light and airy or dark? Do buildings, trees, the width of road etc influence the amount of light that comes into the space?
- Surfaces** Road and pavement surfaces. Does there appear to be any historic surface or is it all tarmac? Is it in good condition?
- Greenery** Is there any type of planting that contributes to the street character? Eg. trees, creepers, window boxes, lawns etc.
- Use** The way the space is used can influence the character of an area. Is it a vibrant commercial street with lots of activity, a predominantly academic area or a quiet residential area. Many spaces have more than one use

Stage 3 An improved pilot

Pilot 3

Key Headlines

Usability improved

Guidance refined

Objectives of project met

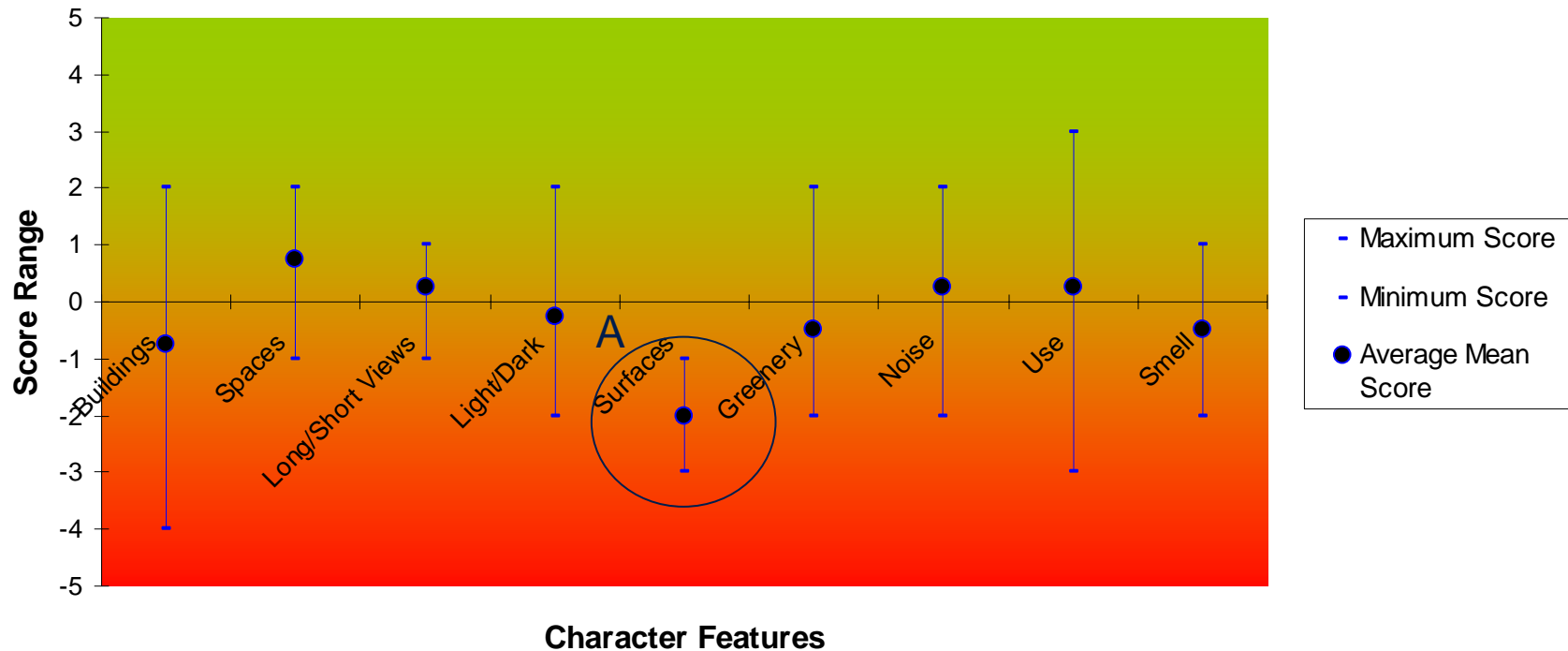
The redrafted guidance notes and questionnaire were incorporated into one document and reissued to the working group. This new format was to be tested in a single location so that results could be compared. Little Clarendon Street was chosen because it tends to polarise opinions of the casual observer. With a juxtaposition of building styles and no pre-Victorian or listed buildings facing the street, the area requires a more considered and in-depth study of its character and attributes.

Meeting Feedback:

- Usability much improved.
- Language could still be improved further.
- The ranking element would be better off at the end of the questionnaire and needs further explanation.
- It was suggested that ranking numbers were grouped to make use and interpretation easier.
- Guidance should set out how results will be used.
- Guidelines should indicate the importance of public participation.
- A new character feature required - condition of buildings
- Working group confirms that the toolkit is now a useful tool that achieves the objectives it set out to accomplish!

Stage 3 An Improved Pilot

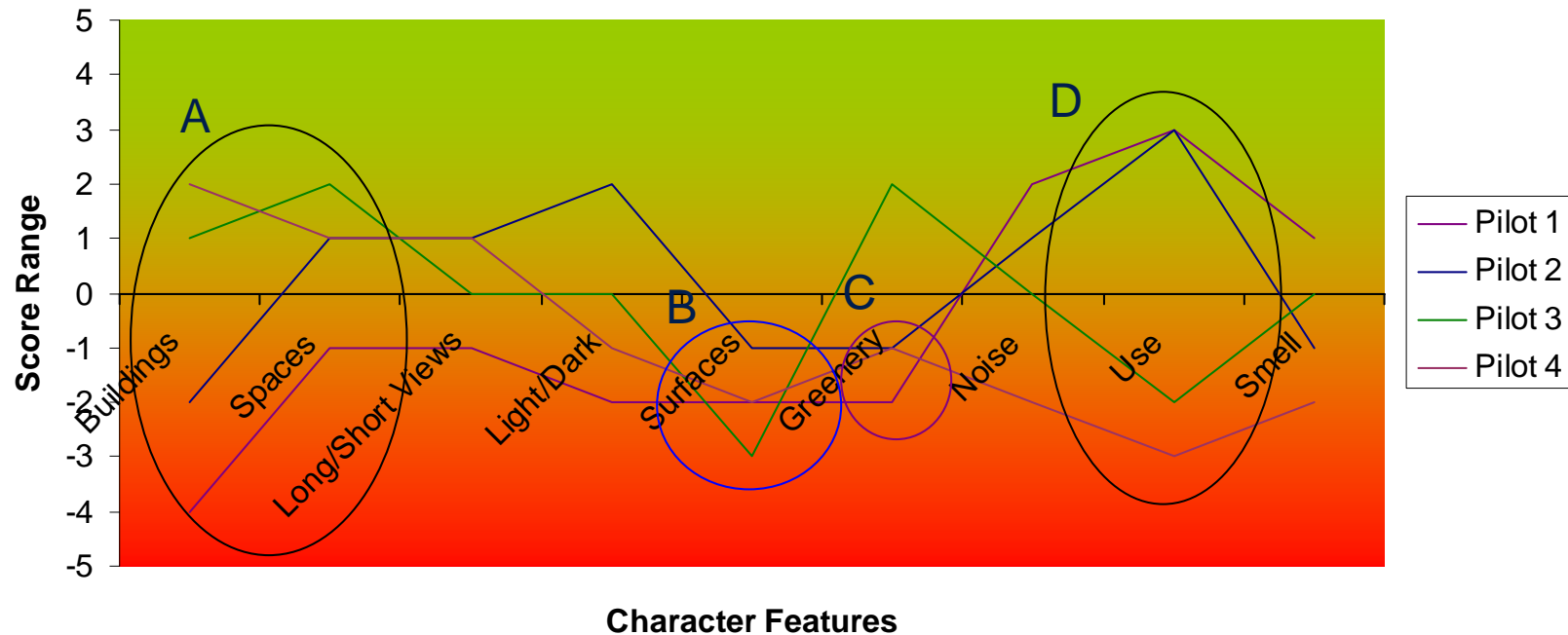
Little Clarendon Street Pilot - Initial Reaction



A – An example of agreement in the scoring between the four pilot assessments – a narrow range of scoring and all in the negative part of the range – Here it appears to be the absence of greener. Nevertheless it would be useful to compare the comments recorded by the assessors to determine how this has a negative impact on the area's character.

Stage 3 An Improved Pilot

Little Clarendon Street Pilot - Initial Reaction



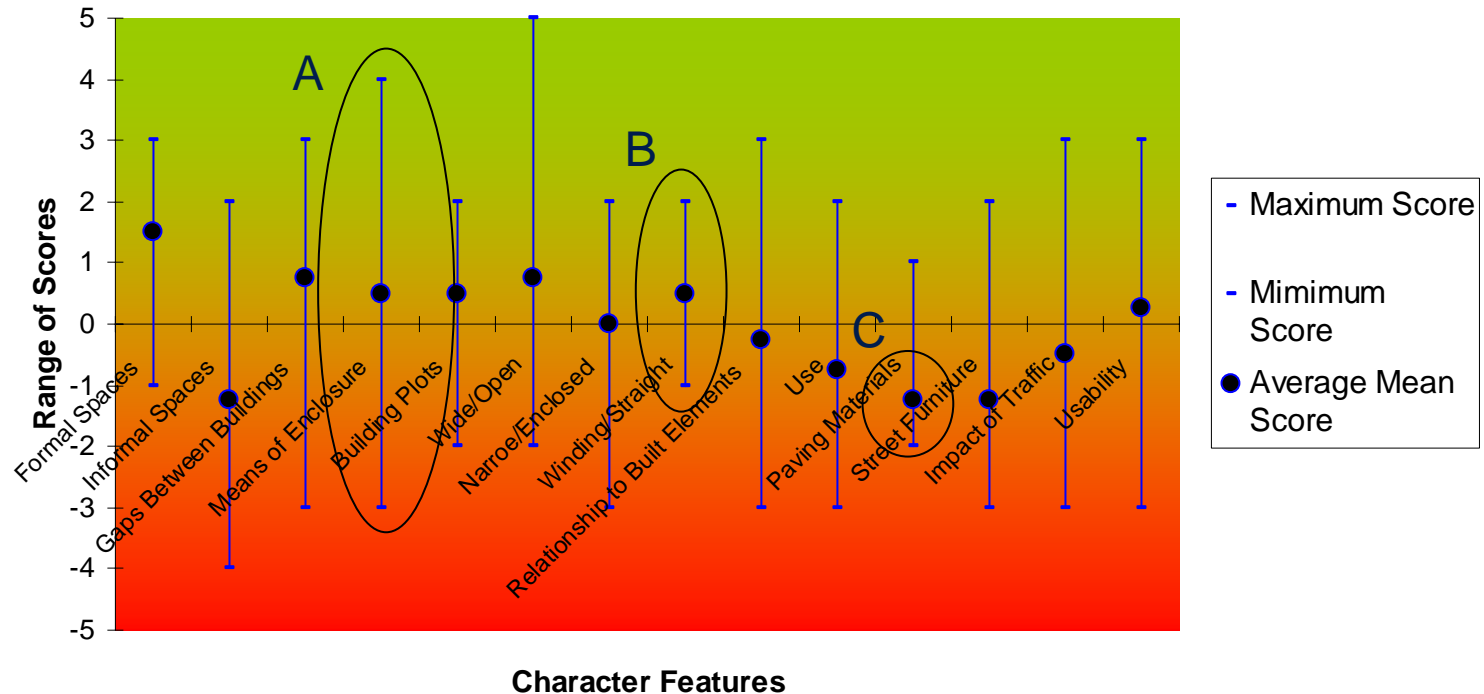
A – Relationship between scores suggests similar appreciation of relative value of character features, e.g. buildings less positive than spaces, despite disparity in scoring

B and C – clustering of scoring suggests a greater degree of consensus

D – Evidence of polarised opinion with two clusters – Again, it would be interesting to compare the comments of the assessors to discover why such divergent opinion resulted.

Stage 3 An Improved Pilot

Little Clarendon Street - Spaces Pilot Scoring



A – Broad range of scores (e.g. between -3 and +4) with average mean near the centre of the range indicates a lack of consensus on the value of this feature

B – A narrow range of scores (e.g. between -1 and +2) suggests greater consensus on the value of a feature, although the central mean still suggests no strong focus of opinion

C – A narrow range of scores with average mean focused at one extreme suggests a stronger consensus on the value of this feature

Stage 3 An Improved Pilot

Hierarchy	Pilot 1	Pilot 2	Pilot 3
1	Use	Use	Buildings
2	Buildings	Light/Dark	Spaces
3	Spaces	Greenery	Use
4	Surfaces	Long/Short Views	Surfaces
5	Greenery	Spaces	Long/Short Views
6	Light/Dark	Surfaces	Greenery
7	Noise	Noise	Light/Dark
8	Long/Short Views	Smell	Noise
9	Smell	Buildings	Smell

Despite clear differences in the assessments of the relative importance of character features by grouping features into top, middle and bottom groups, it becomes clear that some commonality might be detected.

All three pilot assessors rated use as one of the three most important features, surfaces in the middle importance group and both noise and smell among the three least important.

Stage 3 An Improved Pilot

Lessons learnt

- Scoring does produce variations
- There is a degree of correlation on the hierarchy of features in an area.

Outcomes




- 'Condition of buildings' added as a character feature
- Hierarchy of features moved to the end of the questionnaire
- Hierarchy rankings grouped
- Layout of document revised
- Introduction added to guidance to explain how the project will be used.

TOOLKIT PROJECT
DRAFT GUIDANCE NOTES & QUESTIONNAIRE



CENTRAL (CITY & UNIVERSITY) CONSERVATION AREA

Stage 3 An Improved Pilot

<p>Building plots</p>	<p>Building plots refers to the actual piece of land the structure sits upon.</p> <ul style="list-style-type: none"> Do the properties fill the entire width of the plot such as in a commercial street or a terraced row, e.g. Cornmarket or St John's Street? Is there a variety of plot widths along the street? Is there uniformity in the way the buildings along the street fill the plot eg a continuous built frontage, a more spacious layout or a combination of layouts?  <p><small>© Crown copyright. All rights reserved. Oxford City Council, LA 1000 192-45 (2009)</small></p>
<p>Wide/Open Spaces</p>	<p>Wide and open spaces eg. a wide road such as Broad Street or green spaces such as Christ Church Meadow.</p> <ul style="list-style-type: none"> The space between the built elements is substantial light plays a greater role in the character of the area The space may be broken up into sections but the overall character is of a wide airy space e.g. St Giles which is divided into parking bays has an avenue of trees, clearly defined built edges and wide pavements. 
<p>Narrow/Enclosed Spaces</p>	<ul style="list-style-type: none"> Narrow and enclosed spaces are usually formed by a confined space between the building lines often accompanied by tall buildings (3+ storeys). The height of the buildings and the close proximity of the building lines limit the amount of light that can enter the space, accentuating the narrowness of the space and a continuous building line emphasises the enclosure.  <ul style="list-style-type: none"> An enclosed space is not just created by a narrow gap between two building lines, the space can be more substantial but due to a continuous building line and uniform scale of property, there is a clearly defined sense of enclosure to the space.

2. Spaces		
Feature	Comments	Numerical Value -5 to +5
Formal/Informal Spaces		
Gaps Between Buildings		
Means of Enclosure		
Building Plots		
Wide/Open Spaces		
Narrow/Enclosed Spaces		
Winding/Straight Spaces		
Relationship to the Built Elements		
Use		
Paving/Road Surfaces		
Street Furniture		
Impact of Traffic		
Usability and Accessibility of the Space		

Expanding the pilot study

Development Control and Council Member workshop

- Key Headlines
 - Provides a good framework to articulate views
 - Encourages more in depth thinking about features
 - Need for shorthand version

Part of the wider involvement/consultation process Development Control (DC) and Planning Policy Officers of the City Council's planning department were introduced to the toolkit to during March 2009. This involved a short seminar (presentation and question session) explaining how the toolkit could be used in the application/determination process. It was well received and the DC are willing to use it when they consider applications. There was a general consensus that the assessment process would initially take time but once they were used to it the process would become easier and quicker. The officers concurred that the toolkit is a useful tool, especially when making presentations to Area Committees and at Planning Inquiries/Appeals.

Elected Member training also took place in July 2009. The training had the dual purpose of introducing the toolkit project to the Councillors and how they could benefit from incorporating it into their decision making process, reducing the number of emotive decisions made and encouraging decisions to be based on an informed understanding of the impact of the development proposal and its context.

Expanding the pilot study

Meeting Feedback:

- Provides a good framework from which you can articulate views and reports.
- It helps to review initial preconceptions about a place, and helps you examine features that you previously ignored.
- Refine terminology. Ensure it is accurate while not being over complicated.
- It is a long document, but becomes more intuitive once it has been used two or three times.
- Need for a shorthand version for officers to use in the field.
- If this is to be used as part of the planning process, agents will need to be consulted.
- Scoring is open to manipulation.
- Should we be basing decisions on perception?

Lessons Learnt

- Planning is fraught with conflict. It will be necessary to explain that this tool should enable the articulation of views based on evidence and is not a tool to use 'against' officers.
- There is a need to overcome suggestions that the toolkit produces conclusions based on perception. While assigning numerical value to a feature may be subjective. The qualitative results produced are based on observable evidence.

Outcomes

- A shorthand version of the toolkit will be produced for officers to be used on site.

Expanding the pilot study

Wider Consultation

- A wider phase of consultation followed the completion of the third pilot study;
- As the overall aim is for the City Council to adopt the toolkit as part of the planning process it was necessary to test its functionality, robustness and usefulness;
- Applicants will be encouraged to use the questionnaire to undertake assessments in the application process;
- It was decided to consult a wide spectrum of 'planning customers', which can be split into three categories:
 - Agents (developers, architects, private planning practices, etc)
 - Amenity Groups
 - Public
- The Project Team worked with Oxford City Council's Consultation Officer who advised on the use of online consultation software. The software, known as INOVEM, allowed an online consultation platform to be built for the project. All relevant toolkit documents and a consultation questionnaire would be available in a single location. Individuals could be invited to join the consultation (by email with a direct link to the consultation web site).

Expanding the pilot study

Questionnaire

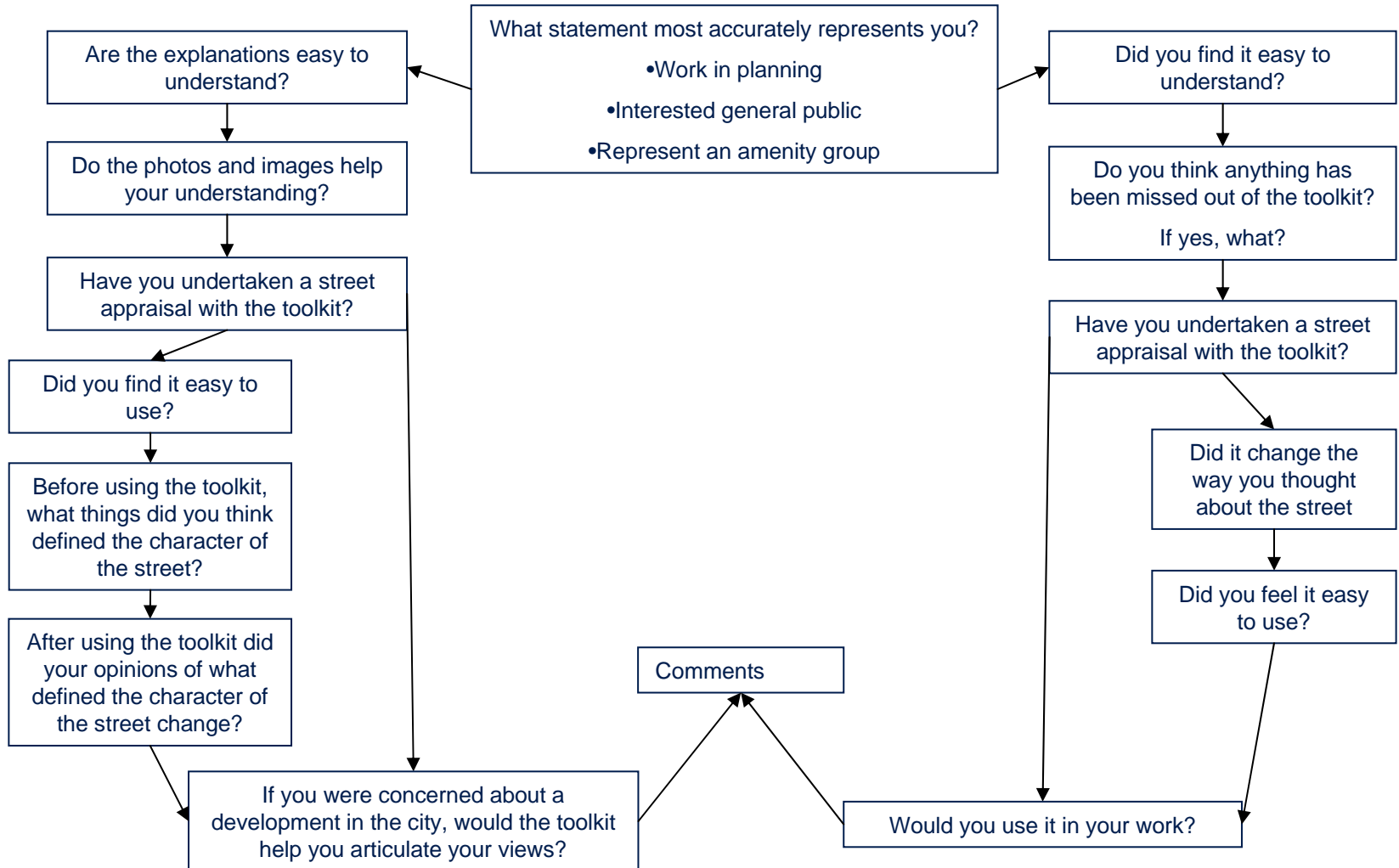
The online consultation process allows the development of highly adaptable questionnaire structures from which data can be interrogated and analysed. The first step was to define what information was to be gathered. The initial thought process for the questionnaire drew from experience gained from the Toolkit's development in the pilot studies. The themes drawn out from this on which to base the questionnaire included:

- Demographic of respondent
- Do people understand it?
- Have we missed anything?
- Does it help define character?
- Would it help people articulate opinions?
- Will it be useful?

The initial structures and questions were too complex. The flexibility of the online platform encouraged an over elaborate response to a relatively simple remit. Further comment was sought from the consultation officer resulting in a simpler and more focussed questionnaire.

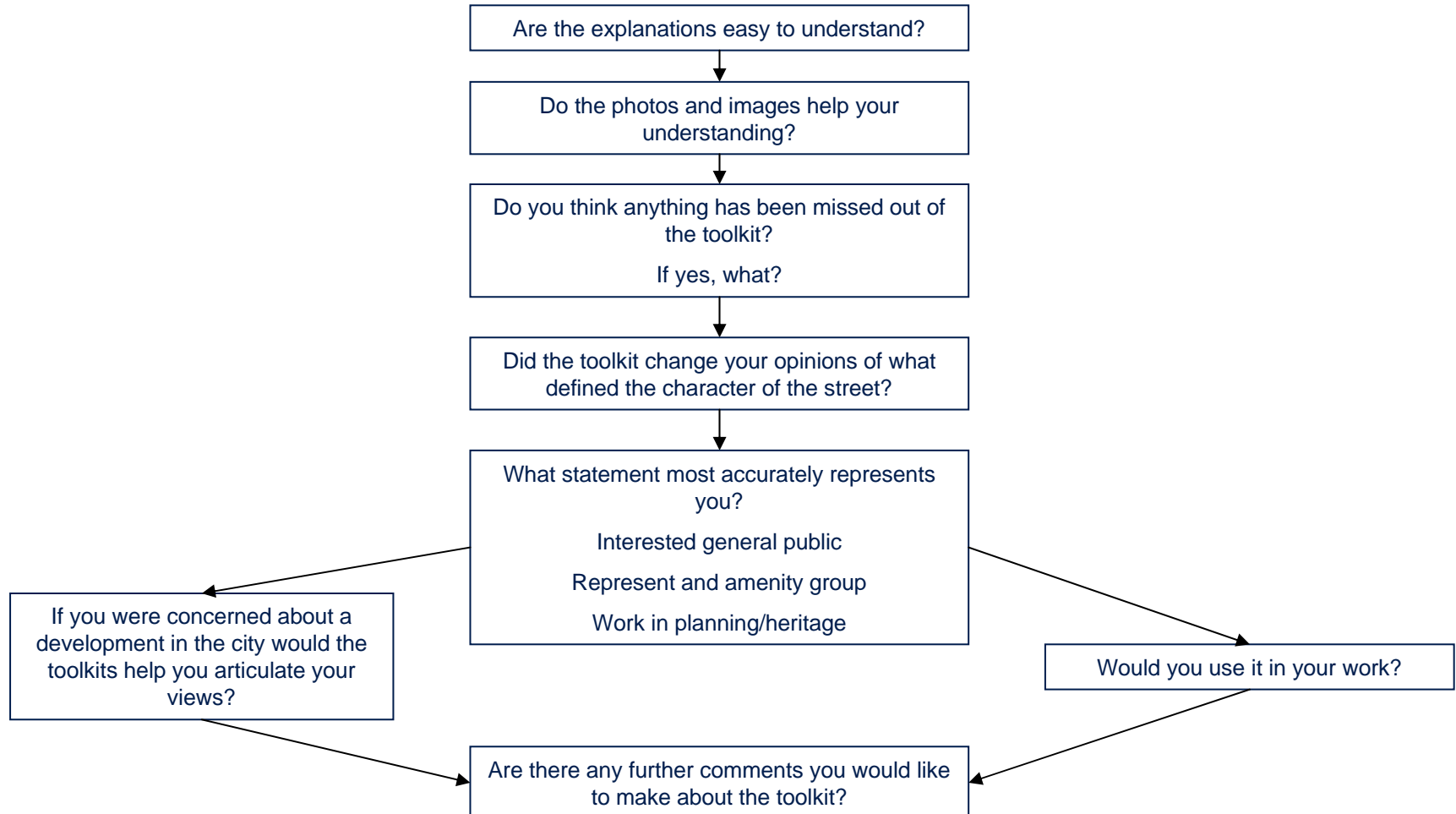
Expanding the pilot study

Questionnaire Format 1



Expanding the pilot study

Revised Questionnaire Format



Expanding the pilot study

Online Consultation

Measure to consult as wide an audience as possible included:

- Databases were used to select participants for **direct invitation** to the consultation, including:
 - The Planning Consultation Database;
 - The Planning Users Panel Database; and
 - The Oxford City Online Consultation Database.
- The Oxford City Online database includes **members of the public** who registered to participate in public consultations. Invitations were targeted to those who expressed an opinion in planning and heritage issues and, therefore, considered likely to respond;
- A wider pool of **planning agents** was selected from an online search;
- **Students** from Oxford Brookes Historic Conservation MSc were invited to participate via their course leader;
- The consultation was **advertised** on the council website;
- In total, 124 individuals and organisations were contacted directly regarding the consultation; 73 by email and 51 by letter.

The online questionnaire went 'live' on the 18th January 2010 and ran until the 1st of April 2010.

Expanding the pilot study

Questionnaire Feedback

- Of the individuals that responded, two thirds had surveyed a street to test the Toolkit.
- All respondents felt the Toolkit was easy to understand.
- 83% felt it was neither too long or too complicated and that it would not be possible to shorten the explanations without making them overtly technical.
- 80% of respondents thought a shortened 'quick guide' would be useful.
- Two thirds felt that the photos and images in the Toolkit helped a lot. A third felt they helped a little.
- The impact of traffic, in terms of speed, calming measures and parking, was identified as a missing element.
- The impact of refuse storage and litter on the character of areas was also identified as needing to be addressed.
- Two thirds felt the toolkit enabled them to define the character of an area a little, one third a lot.
- Half of respondents stated that it changed their initial perception of an area.
- It was widely felt that it would help people articulate their views in the planning process and that it would help inform the design process.
- All respondents felt that they would find the Toolkit helpful in the future. Two thirds a little and one third a lot.

Expanding the pilot study

Further Consultation

In December 2010, a meeting was convened with Oxford Preservation Trust to discuss the preparation of an historic environment evidence base for the West End Area Action Plan using the Toolkit.

It was suggested that a more face to face element of consultation would allow people that were less computer literate or lacked the resources to interact online to engage in the process of developing the toolkit.

A series of presentations and workshops were organised to explain the need for the Toolkit and how it works. The workshops took the form of a short presentation and a practical street survey.

Participants in the workshops included members of the local community as well as members of the Oxford Preservation Trust. The feedback from the workshops was positive, indicating that the project had met its targets. Much of the discussion in the workshops focused on the best way to use the toolkit in the field.

Expanding the pilot study

Comments from the West End Historic Context Study Workshop

The survey form

- The toolkit is somewhat overwhelming initially. However, after using it a couple of times it becomes more intuitive.
- While thorough, the length may put off members of the general public. A shortened 'quick guide' could help.
- Possibly use 'spirit of place' rather than general comments at the end.

Using it

- It provides a good structure for fieldwork. It works best if you become familiar with the street, taking photo's and notes, then return to the questionnaire at home/in the office. This allows you to take in more of the street and be more detailed in your comments.
- It does help define your view.
- You need to 'go on a journey' down the street. If you follow the questionnaire literally there is too much hopping about.
- Individuals need to define their space and talk about what adds to or subtracts from it.

The instructions

- Need to indicate this is a 'guide'. It could be taken too literally. It should be explained that different factors build into character. All spaces are different, therefore you need to react differently. If things don't fit don't use them.
- It is not clear how much detail is required. Instructions should state that you put in as much detail as you have time for and that it is not necessary to examine every building.
- Specific examples and pictures are very helpful.
- Definitions are helpful and thorough.

Towards the finished product

Lessons Learnt

- The need to provide further instruction on the use of the Toolkit in the street.
- The earlier findings that a shorthand version would be useful were confirmed.

Outcomes

- The instructions were further improved with more description on how to use the Toolkit in the street.

Next Steps

- Heritage Plan – The Oxford Heritage Plan is an ambitious project to develop a strategy to guide the management of the city’s heritage. This will inform planning and plans for economic regeneration, but should also influence the use of the city’s heritage assets in providing for the city’s housing needs, meeting the challenge of climate change, creating a healthier and more inclusive city, providing a high quality public realm for residents and visitors and building a safer, more inclusive city. The toolkit is expected to play an important role in ensuring that the character of the city’s environment is properly considered in achieving these strategic objectives
- Publication – The toolkit will undergo a process of editing, laying out and illustration to ensure that it is an accessible and interesting product for use.