**Character Assessment**

**What and why?**

New developments are very often criticised because their designs have nothing to do with, even damage, the character of the town or village in which they take place. This happens mainly because housebuilders in particular often propose standard, ‘off the shelf’, designs and local authority planning officers rarely have the time to undertake detailed assessments of every single town or village to produce the type of strong information that can stop such ‘anywhere design’ in its tracks.

Not just that but, even if they did have the time, it is **you** – the people who live in those towns and villages – who know the distinctive local character best and are best placed to analyse and describe it. And that could be a key component of your Place Plan.

This **Character Assessment Toolkit** is about starting you on your way to producing the sort of detailed local information that can stop the worst and help to produce the best, i.e. designs that are based on a proper understanding of what makes your place special and distinctive, and how that can be enhanced through new buildings. The Toolkit helps you to produce the level of information most appropriate for a Place Plan.

*(If you wish to go into more detail, your community could also produce a Village or Town Design Statement. These too can become Supplementary Planning Guidance, so be sure to discuss this with your local authority contact officer. If you have done or wish to do a Design Statement, there is then no need to do anything else about character and design for your Place Plan; just be sure that each refers to the other.)*

**How?**

Undertaking a Character Assessment is a significant task but also very important for many communities. At the same time, long experience shows that people really enjoy doing this sort of assessment work. The key thing is therefore to find as many people as possible to help out, and spread the load so that no individual does too much.

There are 3 stages to completing a Character Assessment of your area. All the forms and notes mentioned overleaf follow later. Your local authority should be able to provide you with relevant maps.

**Stage 1: Desk Work**

* This involves:
  + A. Looking through some **Background Material** about your area.
  + B. Defining some possible **Settlement and Landscape** **Character Areas**.
* The **Desk Work Guidance Note** (pages 3 and 4) describes this more fully.

**STAGE 2: Field Work**

* There is a **Settlement Survey Form** (pages 5 to 8) and a **Landscape Survey Form** (pages 9 to 12) to use for the field work.
* The aim is that several small groups (we suggest 2/3/4 people) will go out and complete a survey for each of the Character Areas identified in your Desk Work.
* Going out is crucial, even if people think they know the area well!

**Stage 3: Summarising**

* When all the surveys are completed, reconvene the ‘Character Working Group’ (see over).
* Share round all of the material – background material, character area maps and surveys – and put together a **Snapshot** **Character Summary.**
* **T**he **Summarising Guidance Note** (page 13) outlines how to produce a summary.

***NB. REMEMBER THAT THE FORM THAT FOLLOWS IS AN EXAMPLE ONLY.***

***IT SHOULD BE DISCUSSED WITH YOUR LOCAL AUTHORITY***

***AND PERHAPS ADAPTED AS A RESULT.***

**Desk work guidance note**

These tasks are best done by a small ‘Character Working Group’ (we suggest 4-6 people) sitting together in a room.

**A. Background Material**

* This can vary significantly from place to place but it can include:
  + Local history information, development of the town etc.
  + Basic planning information collected for other aspects of the Place Plan.
  + Photos from keen local photographers.
  + Information held by your local authority (so ask them!).
* Finish by drafting a short interim summary, just a page or so, that captures the key points from the various information sources.

**B. Defining Character Areas**

Settlement (village or town)

* Start with a good sized map of the village or town (the ‘settlement’) itself and make several copies (and have several pens) so that all the group members can do the same task on their own first.
* The task for each group member is to think about, and draw around and name on a map, the different parts of the village and their different characters, for example:
  + the character of some areas may be narrow and winding,
  + some areas may be open with straight roads,
  + some may have buildings of just two or three storeys, others may be mainly bungalows,
  + some may be older areas, some estates from the 1970s or 1990s,
  + some parts may be full of lots of different building types, some may be of all one basically similar type.
* Some villages are very small, perhaps with just 2 or 3 small and distinct character areas (and some towns quite a few), but there can also be separate hamlets. Treat each hamlet as a separate character area.
* Try not to go into too much detail and have too many tiny areas; the aim of this exercise is very practical: to identify broad areas for undertaking the field work.
* There is no right answer to this, so it is important to let everybody have a go on their own.
* Then share and compare what everybody has done and see if you can at least agree some basic areas.
* Give a name to each area once you have agreed them and mark the areas and their names on a ‘master copy’ map.
* A Settlement Survey Form will need to be completed for each of these Settlement Character Areas.

**Landscape**

* Much as above but in this case each group member can then sketch, on a map of the whole of your Council area, some possible sub-areas of the landscape, each with a different character.
* Is the landscape different to the north, south, east and west? For example:
  + Is there a winding valley to the south,
  + a river valley to the north,
  + rolling hills to the east,
  + a wooded area or open fields etc.As above, there is no right answer to this, so let everybody have a go on their own.
* Once done, compare everybody’s versions and try to agree a common one.
* Mark the areas on a ‘master copy’ map and give each a name or number – this will help you to structure your survey work.
* A Landscape Survey Form will need to be completed for each of these Landscape areas.

**Some hints:**

* It does not matter if you cannot agree different areas, although it can be very demanding for just one small group to survey a whole village/town or a whole landscape.
* If you wish, just divide things up - for now - into more practical areas, solely to make the field work more manageable.
* And that is important because this work cannot be final. The results of the detailed survey work will probably suggest that you should revisit – and even change - what you decide at this desk work stage!

That’s the Desk Work done, now the surveys.

**Settlement survey form**

ALERT! Below are some acronyms – please refer to the Planning Aid Wales website for a glossary of planning acronyms.

Surveyors(s): ………………………………………………………..

Character Area: ………………….

Date: ………………… Weather: ……………………………

* Look through all the questions before starting.
* For almost all the questions on Pattern and Buildings just ring a word (or two) in each box that best fits what you know/see and, as necessary, add some notes about quality, condition etc. in the space below.
* The final Summary questions include their own instructions.
* Don’t get stuck with our way of phrasing questions; adapt as you wish and leave any questions that do not seem to apply.
* Take a form, clipboard, map, camera and a pen or two with you when you go out.
* Take any photos you think are useful (often more useful than some words) and add any photo names/numbers in the right hand boxes once you get back to ‘base’.

**1. Pattern**

|  |  |
| --- | --- |
| **Character Element** | **Photo(s)** |
| **A. Topography:** *Flat Hilly Steep Shallow Plateau Valley*  *Linear valley Several valleys* |  |
| **B: Layout:** *Linear Grid-like Winding Regular Irregular Front gardens Buildings close to the road Buildings well set back Back gardens Long plots Thin plots Short plots Wide plots Clear centre No obvious centre* |  |
| **C: Spaces:** *Gaps between buildings Green spaces Hard space*  *Places where local events take place Well used Not well used* |  |
| **D: Green and Natural Features:** *Trees Bushes Hedges*  *Green backcloth to buildings Areas of intense greenery Areas without greenery* |  |
| **E: Wildlife and Ecology:** *Area used/inhabited by wildlife Not used at all*  *Area used for wildlife to pass through What wildlife? Important plants?* |  |
| **F: Roads, Streets and other Movement Routes:** *Pavements Kerbs Grass verges Drainage ditches Wide roads wide Narrow roads Straight roads Curving roads Cul-de-sacs Through roads On-plot parking On-street parking Parking courts* |  |
| **G. Landmarks*:*** *Are there key landmarks visible from a distance (church tower), community landmarks (pub) or special but smaller features (old milestone)?* |  |
| **H: Views Out:** *Are there places (often, occasional) where one can see out to other areas or to the landscape?**Where and what can be seen?* |  |
| **I: Views In:** *Are there places around\* where it is possible to get views into this area? (\* You’ll need to go round and about to spot these.)**Where and what can be seen?* |  |

**2. Buildings and details**

|  |  |
| --- | --- |
| **A: Predominant Building Shape and Heights:**  *Wide frontages Narrow frontages Terraced Semi-detached Detached 1 storey 2 storeys 3 storeys Common shapes Varied shapes* |  |
| **B: Roofs:** *Flat roofs Pitched roofs Steep pitch Shallow pitch*  *Varied pitch Lean-tos Parapet fronts (hidden roofs)* |  |
| **C. Predominant Materials:***Some common Nothing common**Roofs (tile, slate, other) Walls (brick, stone, render, hung tile) Boundaries (walls, hedges, fences) Ground (tarmac, concrete, setts, paving stones)* |  |
| **D: Details:** *What details contribute to character: porches, window shapes, roof decorations, chimneys, benches, letter boxes, signs, flags?* |  |

**3. Summary**

|  |
| --- |
| **A: In a few words or a sentence or two, what are for your group the key positive features about this area? What makes it special?** |
| **B: In a few words or a sentence or two, what are for your group the key negative features about this area? What detracts from it?** |

**Landscape survey form**

Surveyors(s): …………………………………………………………

Area name or number: ……………

View Point Numbers: …………… Date: …………………

Weather: ……………………

* Look through all the questions before starting.
* For almost all the questions on Description and Views and Landmarks, just ring a word (or two) in each box that best fits what you know/see and, as necessary, add some notes about quality, condition etc. in the space below.
* The final Summary questions include their own instructions.
* Don’t get stuck with our way of phrasing questions; adapt as you wish and leave any questions that do not seem to apply.
* Take a form, clipboard, map, camera and a pen or two with you when you go out.
* Take any photos you think are useful (often more useful than some words) and add any photo names/numbers in the right hand boxes once you get back to ‘base’.

**1. Description**

|  |  |
| --- | --- |
| **Character Element** | **Photo(s)** |
| **A. Land form:** *Flat Gently undulating Strongly undulating Steep valley*  *Valley side/floor Plateau* |  |
| **B. Land cover:** *Open farmland Farmland with trees/woods Woodland Parkland Wetland* |  |
| **C. Land use:** *Arable farmland Grassland Grazing Mixed Forestry Industrial Brownfield Orchards* |  |
| **D. Field Boundaries:** *Tall Clipped Intermittent Hedgerow*  *With/without trees Fences Walls* |  |
| **E. Field Sizes and Patterns:** *Small Medium Large Regular Angular Linear Irregular* |  |
| **F. Routeways:** *Few roads Dense road network Tracks*  *Straight/Winding /Narrow* |  |
| **G. Buildings and Structures:** *What man-made elements are in the landscape? Village(s)/Town Isolated Farms Barns Groups of dwellings Pylons*  *Masts Wires How do they ‘sit’ and what natural features influence that?* |  |
| **H. Water and Drainage:** *Stream River Reservoir Wet ditches Ponds Lake* |  |
| **I. Enclosure and Scale:** *Tight Enclosed Open Exposed/Intimate Small Large Vast* |  |
| **2. Views and landmarks** (mark on the map) | |
| **A. Views:** *Sweeping Channeled Long Short Glimpsed*  *Across/to a place or landmark*. |  |
| **B. Landmarks:** *Buildings Structures Natural features History Archaeology* |  |

**3. Summary**

|  |  |
| --- | --- |
| **A. Scenic Quality:** *Think about sounds, smells and colours, how it makes you feel, does it feel tranquil? Think about balance (harmonious - chaotic) and diversity (uniform – complex) Seasonal features can also be important.* |  |
| **B. Activities and Associations:** *What do people do in this landscape? Work and/or leisure? Do people paint or photograph it? Are there local poems or stories? What makes you identify with it or value it?* |  |
| **C: In a few words or a sentence or two, what are for you the key positive features about this area? What makes it special?** | |
| **D: In a few words or a sentence or two, what are for you the key negative features about this area? What detracts from it?** | |

**Summarising guidance note**

* Reconvene the original ‘Character Working Group’ who did the desk work.
* With surveys finished, you can now summarise this information, pulling together all material to draft out an overview of the character of your area.
* Bring together the different surveys and work through them to agree what summary information needs to be captured.
* This is the key time to use some of the maps you have annotated and the photographs that have been taken.
* If anything, keep the words as **few** as possible and include **more** photos and maps that state clearly what aspect of character they are illustrating.

**Your Overall ’Character Summary’**

***Please note****:*

* *This is not a one-to-one summary of every single item, aspect or question in the desk work or surveys! It is a separate piece of overall, descriptive writing (with photos and maps) that draws from the detailed work.*
* *This is also the stage at which you can – and probably should – review the original Character Areas, perhaps combining some perhaps sub-dividing others.*

Include information under headings such as these, using text, maps and photos:

* **Character Areas:** A final map and brief notes on each of the Settlement and Landscape Character Areas.
* **Landscape:** A brief summary description covering the main features of the landscape, including the relationship between the settlement(s) and the surrounding countryside.
* **Settlement:** A brief summary description covering the main features of the settlement pattern, buildings etc.
* **Sense of Place:** Some text highlighting the key qualities of your area.
* **Positive Features:** A summary of what emerged as the overall positive features of the settlement and the landscape.
* **Negative Features: A**s above for the key negative features.

And finally, a rather different element:

* **Looking ahead: Conserve, Enhance, Create:** Some brief notes on any particular features that need to be conserved or enhanced and on anything that could be added or created to improve the character.