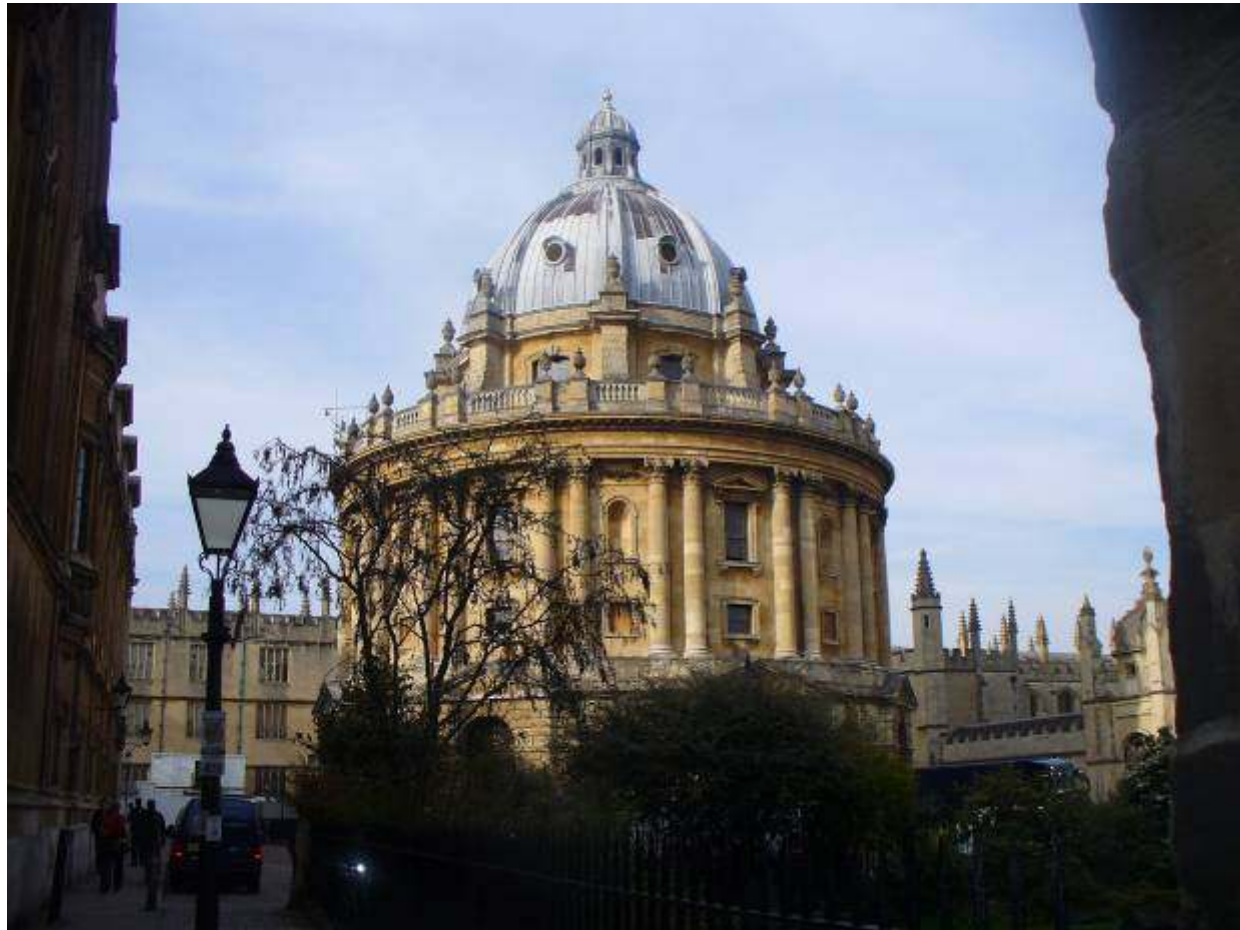# An Introduction to the Oxford Character Assessment Toolkit

OXFORD PRESERVATION TRUST

ENGLISH HERITAGE

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What is it for?

- The Character Assessment Toolkit will help you make your own assessments of the character of the landscape and built environment.

- You can use it when considering development and planning matters and to inform decisions about managing the environment.

- It provides questions to help you consider how different features of the landscape/townscape contribute to its character.

- It asks you to judge the relative significance of different elements of the landscape to its character (both positively and negatively).

Where can you use it?

You can use the toolkit to assess the character of:

- areas, such as conservation areas, settlement centers or housing estates;

- places and spaces, such as streets, parks or public squares; and

- buildings, including their settings.

Where does it fit in decision making?

Planning Document (e.g. Area Action Plan)

↑

Prepare policy protecting positive characteristics and to mitigate negative features and issues

↑

Consider results of assessments and prepare character statements as evidence base

↑

Use survey forms to do character assessments

↑

Research history of the area

↑

Consider area – one detailed area assessment or several rapid assessments needed?

Planning Application (applying)

↑

Prepare design and access statement explaining process

↑

Design new development

↑

Consider positive features to integrate and negative features to mitigate

↑

Use survey forms to do character assessment

↑

Research history of the site

↑

Consider the site and environs – detailed or rapid assessments required?

Planning Application (commenting)

↑

Prepare comment on application

↑

Consider impacts of development proposals on identified positive and negative character features

↑

Use survey forms to do character assessment

↑

Research history of the site

↑

Consider the site and environs – detailed or rapid assessments required?

Who is the toolkit for?

The Oxford Character Assessment Toolkit is for the use of:

- Developers, landscape and urban designers and architects;

- City and County Council Staff;

- City Council Planning Policy and Development Control;

- Public amenity and interest groups; and

- Private individuals

The toolkit provides a standard process for users to assess the character of an area.

The results of assessments are likely to vary between users as a result of different experience, knowledge or emotional attachment. This is a valued part of the assessment process.

Who is the toolkit for?

Developers, landscape and urban designers and architects:

Planning policy requires developers to ensure their new developments complement and enhance the established character of the area. Using the character assessment toolkit helps prepare a baseline of evidence to inform the design of their proposals.

Examples:

Using the toolkit to identify existing positive townscape characteristics of around a development site will help to identify the existing spatial arrangements, features and materials, or particularly attractive views that can be integrated into development proposals. This will add value to new development and help it to complement the townscape in its surroundings.

Consulting communities

Developers may need to consult local communities to find out what they value most about the character of their local area. The toolkit provides a way to collect the views of local people. This may help identify suitable forms of development for the area and avoid opposition to proposals and make the best use of the local environment to add value to development.

Who is the toolkit for?

City and County Council staff:

Many capital projects have potential affects on the character of the city's urban environment and landscape. Examples range from building projects and public realm or highways schemes to waste and recycling projects and play schemes.

Understanding the characteristics of the local environment can help in planning projects and to prevent unintended impacts on local character.

An Example

When planning streetscene improvements, the Council need to consider the contribution of the existing streetscape and make decisions about features to remove and retain and the appropriate materials and design of new street furniture to sustain the quality of the area.

The toolkit can be used to identify the types of materials and street furniture that predominate in an area, the relative significance of these to the character of the environment and the interaction between the public spaces, the surrounding buildings and property boundaries.

Who is the toolkit for?

City Council Planning Policy and Development Control

The City Council's officers often need to take account of the prevailing character of an area or place when preparing planning documents or making development control decisions.

Using the toolkit enables consideration of potential impacts of changes to character and appearance, and will help in identifying the means to integrate new development into the existing landscape successfully

An example

When deciding whether a proposal will complement the prevailing character of an area, development control officers may wish to define what the most significant features of an area's character are. This is likely to be of particular value when considering proposals for development within a sensitive area, such as a conservation area, or for a development with a strong character.

Who is the toolkit for?

Public amenity and interest groups:

Many local groups want to contribute to the planning process by commenting on the preparation of planning documents or applications. These groups provide considerable knowledge and awareness of the positive aspects of the local character.

The character assessment toolkit provides an opportunity for local groups to put their knowledge into a structured form that can be used to articulate their views and help informed decision making

Examples:

1. A local residents' group may be concerned that a proposed development would be out of keeping with the character of their area. Using the toolkit enable them to identify the positive characteristics of the area to support any representations they wish to make.

2. Local amenity groups can use the toolkit to contribute to the preparation of planning documents like conservation area appraisals by documenting what they believe to be the most important features of the character of their area, which should be protected, as well as identifying the features that detract from its amenity.

Who is the toolkit for?

Private individuals:

Private individuals may wish to comment on planning applications, contribute to the preparation of planning documents or prepare their own development proposals.

The toolkit can be used to help evaluate what you already know about an area but perhaps take for granted.

You may wish to use the assessment tools for your own information or provide structured comments to the City Council.

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Choose your tools

We have prepared a long form and a shorter version of the character assessment toolkit's survey questionnaire. Which one should you use?

This depends on:

how detailed your assessment needs to be; and

how familiar you are with assessing character.

Use the longer form the first time you use the toolkit. This gives you more prompts to consider how the landscape/townscape contributes to the character of the area, place or building you are assessing.

If you are already familiar with assessing character and have different places or areas that you would like to document separately, it might be best to fill in several of the shorter forms (one for each of the areas you assess).

Be prepared

1. Print off one or more copies of the version of the questionnaire you have chosen to use and fill them in when you are in the place you are assessing.

2. Look through the prompts and check the explanations of any terms that you don't understand in the Guidance Notes provided on the Council's website.

3. You may find it helpful to use a map of the area to make notes. You can normally photocopy an A4 section of the local ordnance survey map in your local library – scales of 1:2500 1:1250 are very useful for illustrating comments about individual streets and buildings.

Whilst you are in the library … have a look for any books about the history of the area or any maps showing how it has changed over time. The historic editions of the Ordnance Survey maps are a useful starting point to see how an area has changed over the last 100 – 150 years, you may also find copies of earlier tithe and enclosure maps.

Useful books include the Victoria County History, Nicholas Pevsner's Buildings of England Series and any collection of historic photographs of the area. Past development and activities of the area may have a strong influence on its character and add historic interest.

Using the toolkit

Getting started

1. Visit the area you are going to assess.

2. Walk around the area and find a number of place to stand so you see it from different angles and perspectives.

3. If you are using the longer form, use the first page of the questionnaire to record your initial impression, including the differing importance of the features that contribute to the character of the place. Use the following pages to explore in more depth about each aspect of the environment.

4. Make short notes while you are in the place and take lots of photographs. You can expand on your notes when you write up your findings later on. The photographs will provide another useful reminder including details you may have overlooked at first inspection … but have you taken enough?

5. You could use the 'Spirit of Place' box to note any features of the place that occur to you outside the prompts in the boxes provided.

Filling in the forms : Answers to some frequently asked questions:

Do I need to put an answer in every box?

No. Use your judgment to decide whether a prompt is relevant to the area you are assessing. For example, not all areas have water or street furniture as a significant feature.

How much should I write?

This depends in part on the complexity of the area being studies. Remember that a short and focused assessment may provide a faster understanding of the area than a meticulous account of its history and recent planning history.

Should I repeat things I have written on the first page?

No. After filling in your initial impressions page use the subsequent forms to add detail rather than repeat what you have already recorded. This may mean that you leave some boxes blank, but state if important features have been noted on the front page to give you a reminder later on.

Be confident ... you are describing your own experience of the place. If you feel it is important that the buildings are old or have a distinctive appearance say it as you see it.

Base your comments on the evidence of what you see and record this.

If you are struggling to decide what to note down, or what any of the headings mean, check the guidance booklet that you can download from the City Council's website. This helps to explain the terms used and provides some additional prompts to help you.

If you are still finding it difficult to use the forms, contact one of the City Council's Conservation Officers, who will be pleased to help you.

What's the score?

After writing down our observations on the survey pages try giving a score to the importance for each feature you observed in terms of its positive or negative contribution to the area's character (as a simple rule, think does its presence or condition make the area better or worse as a place to be?)

You can give more than one score for an individual feature if you wish (see below).

Positive and negative scores

For example, if a particular building stands out as a landmark in the area, has locally distinctive materials and reminds you of the area's history you might state this in the 'buildings' survey boxes and give each observation a score of +4 or +5 for the particular building's contribution.

However, if that building has been vacant or neglected for a long time and is in a derelict condition that detracts from the appearance of the wider area, you could note this and provide a second correspondingly negative score.

Neutral scores

Some element make a clear and positive contribution to the character of an area. In some instances it will be less clear if something makes a contribution, if at all. A simple test to consider is if taken away or replaced what difference would it make. If the answer to both questions is no, these features may be neutral or making only a slight contribution in either way. In such cases it would be appropriate to note these features but to give them a score of 0 as neutral or in the range -1 to +1.

Using the toolkit

Using maps

Maps can help to illustrate and document the observations you record on your survey forms.

You can record the lines of particularly attractive views, positions of trees that make the area greener or add to the feeling of enclosure, the regularity of gaps between buildings or prevalence of particular materials or types and ages of buildings.
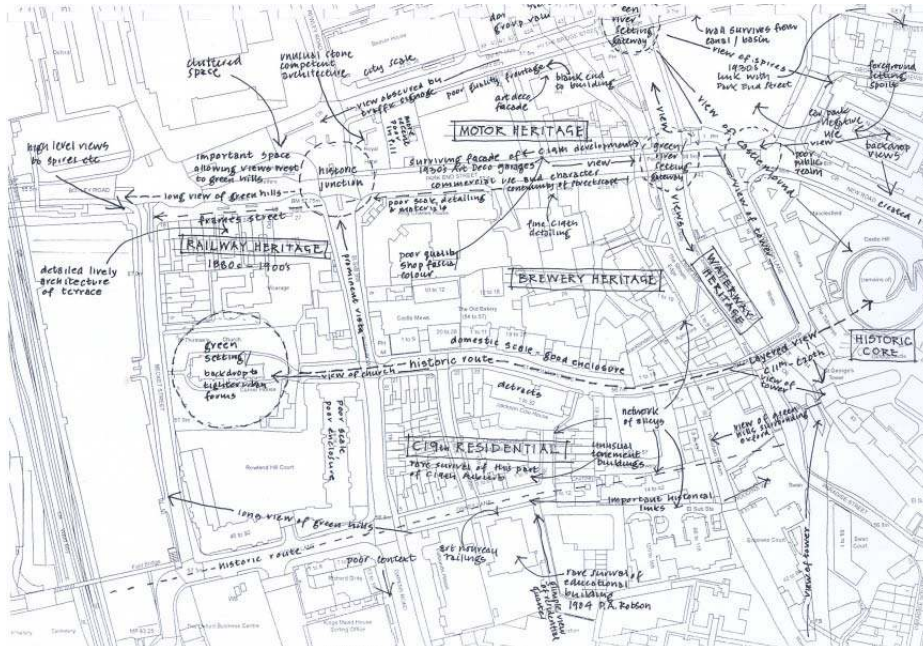
What comes next?

Doing the assessment shouldn't be the end of the process …

… the information gathered is intended to inform the planning process or decision making.

Identify what was positive and negative

- Consider the observations you have made including the positive and negative scores you assigned to features of the landscape. What, if anything, could be done to reduce the negative impacts and how can the positive features be best protected?

How might development proposals affect the character of the area?

- Consider how the development will respond to the positive features of the surrounding area.

- Are there positive features within the development site that could be preserved and integrated to sustain their contribution?

- Are there any negative impacts that the development might help to resolve?

Summarise your findings

- Summarise your assessment in a written statement (in your design and access statement or statement of significance or for example), describe how you have considered the potential impacts or benefits of your proposals and, if appropriate, how they have influenced your design.

- Are any of the impacts of the proposals justified by other benefits they will deliver?

What comes next?

Use your findings as evidence

• If you want to comment on a planning application or proposed planning document, summarise the findings of your assessment and use these to support your comments.

• Organise your summary using the headings for the features that you considered to be most significant or provide a list of each of the most positive and negative features of the area's character. You may wish to include a copy of your assessment forms and annotated maps along with your representations to provide evidence of how you came to your conclusions.

• If there is anything that you think could be added to the forms to make them more comprehensive, or easier to use please let us know.