

This document reports on work carried out under contract to SNH and is published with SNH's agreement.

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Orchard Research & Enterprise CIC

Thanks for all your contributions

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Cover illustration: Word cloud for *Wise Next Steps*; part of a workshop creating a collective vision at Orchard Gathering 2014, Dunblane. www.orchardrevival.org.uk/gathering

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1 REPORT SUMMARY

This document reports on a further stage in creating a National Orchard Inventory for Scotland. It describes work carried between in the year April 2014 to 31st March 2015 in the third Phase of the Inventory project.

The aim of the wider project is to create a comprehensive orchard inventory for Scotland. This has probably not been attempted for over a century.

The rationale that underpins this aim is that an Orchard Inventory will form the basis for addressing a number of issues linked to the decline of orchards over the last four decades and create a strong foundation for their revival.

This phase of the Orchard Inventory programme focussed on learning from the pilot field verification of Phase 2, and developing the project in order to roll out the field verification across the nation.

The aim has been to be in a strong position to deliver the next phase on the ground. The objectives in Phase 3 were a discrete but connected set of tasks :

- awareness raising
- learning from the pilot
- engaging and developing capacity with local organisations
- costing the rollout across Scotland
- planning the legacy

A significant amount has been achieved in term of awareness raising, with the project contributing to the first major Orchard Gathering in many years, which in turn is resulting in follow up events and a public Facebook group with over 250 members.

Significant improvements have been made to data collection systems; these are providing greater robustness and thus reduced risks. The collection system has moved to a cloud-based method, rather than relying on individual survey files. New systems have been created to share geographic data with Local Facilitators and groups, and to map orchards that were not previously found as part of the Deskstudy. These are not only more cost effective but better at sharing data with those who can effectively use them.

Though recruiting organisations and Local Facilitators has been slower than anticipated, systems have been created to continue that work in a methodical and transparent manner. Again cloud-based services have been employed, and feedback is that these are easy for collaborating organisations and volunteers to use. Engagement with organisations and individuals through events has been a further significant positive benefit from this phase.

A draft work breakdown structure, together with costed resources has been developed for the forthcoming phase of the project - that is field verification across Scotland over the next two years. Work has been carried out to identify funders of the next phase.

Finally, a suite of more than 15 legacy project templates has been initiated, for developing a planned legacy from the next and final phase of the project. The rationale for the Inventory is the provision of a foundation for further action; in developing templates for legacy projects, we facilitate that positive legacy.

This phase of creating a National Orchard Inventory for Scotland has provided essential preparation to the roll out of field verification work across the country. The successful delivery of this phase is another step towards the goal of orchard revival, and bodes well for the future of Scottish orchards.

2 INTRODUCTION

There has been growing interest in traditional orchards in Scotland for nearly a decade. This interest has a great breadth; from cultural heritage and horticultural practice, to historic varieties and the gradual disappearance of this unusual Scottish habitat.

The document reports on a further stage in creating a National Orchard Inventory for Scotland. It describes work carried between in the year April 2014 to 31st March 2015 in the third Phase of the Inventory project.

3 AIMS, OBJECTIVES & METHODOLOGY

3.1 Aims of wider project

The aim of the wider project is to create a comprehensive orchard inventory for Scotland. This has probably not been attempted for over a century.

The rationale that underpins this aim is that an Orchard Inventory will form the basis for addressing a number of issues linked to the decline of orchards over the last four decades and create a strong foundation for their revival.

Raising awareness of the diverse value of Scotland's orchards will be a key 'soft' outcome; the 'hard' outcome will be publically available GIS dataset.

3.2 Aims of Phase 3

This phase of the Orchard Inventory programme focussed on learning from the pilot field verification of Phase 2, and developing the project in order to roll out the field verification across the nation.

The aim has been to be in a strong position to deliver the next phase on the ground.

3.3 Objectives in Phase 3

Discrete but connected task sets were described in the contract. These were:

- awareness raising
- learning from the pilot
- engaging and developing capacity with local organisations
- costing the rollout across Scotland
- planning the legacy

This report describes how they were addressed.

3.4 Methodology

The methodology largely continues from foregoing phases of the project, and have been reported previously¹. The task sets described in the contract provide the methodology.

¹ Hayes, C.W. 2014 *Report on Deskstudy for Scotland and Pilot Field Verification for Scottish Borders. Phase 2 of A National Orchard Inventory for Scotland. Project PP786 Report to SNH.*

4 CONTRACTED WORK

4.1 Awareness raising

4.1.1 Tasks for awareness raising

- Telling the story of Scotland's orchards. Write-up coherent story and image collection.
- Promoting that story through; creation of web resources, writing press articles, providing opportunities for radio and TV, national events.
- Setting out the stall; providing information about opportunities to collaborate with the project for both individuals and organisations

4.1.2 Media content & publication

Content was created and presented as a Project profile and Media FAQs document early on in the contract. This is a useful source for preparing subsequent material. The document was recently updated, and is given in full in Section 6.1 below.

Slide presentations have been created and delivered, and now continue their work as embedded displays on our web pages and other websites.

The project website www.ScotlandtheFruit.org has been a key conduit to publish material, as well as providing other resources to collaborators, volunteers and other interested parties. The site is 'mobile responsive' so can be viewed easily on phones and tablets.

The wider host site Orchard Revival (where ScotlandtheFruit is hosted and has a series of pages) has also played a role in getting the story told; through related pages on Network and on Gathering.

Orchard Revival site has a moderate amount of traffic, considering its slightly off-the-beaten track subject. During half of March 2015, stats showed 140 visitors and over 400 views. Stats also show that over half this traffic is related to the Inventory pages.

4.1.3 Gatherings and public events

Gardening Scotland, Ingleston. May 2014.

The display telling the story of the Borders pilot and the deskstudy for Scotland was created as part of the SNH stand at this event. It was presented by the author to the Scottish Government's Minister for the Environment. Paul Wheelhouse appeared genuinely interested and talked for 10 minutes about orchards. Samples of Scottish orchard produce (kindly donated by Cairn o'Mhor) were provided for tasting.

Orchard Gathering 2014, Dunblane, Nov 2014

Project partner ORE, collaborated with Fife Diet and Forth Environment Link to host the first national orchard gathering in Scotland for a very long time. Just under 100 people attended and the event has been seen as a significant success.

The gathering has its own website at <http://orchardgathering.weebly.com>

There is a great short film on that homepage, and it gives a good flavour of the event. It was mainly a workshop style event, though there were stalls and displays including the Inventory. One of the key events was a presentation by the author entitled 'The Inventory Story So Far' which culminates in a call-to-arms for volunteers and collaborating organizations to sign up to the field verification work of the Inventory. The slides are given in Section 6.6 below and can be seen embedded at ScotlandtheFruit homepage.

There were several important outcomes from the gathering, apart from a great networking event. One was the 'visioning' exercise that was carried out in the afternoon, but perhaps more directly relevant to the Inventory project was the creation of a self-organising facebook group, that the assembled people decided to call Orchard Collective Scotland. The page is

very active and has a growing membership currently standing at 240. It is a useful tool to communicate about the Inventory.

Gathering Follow-up, Edinburgh, 21st Feb 2015

The organisers of the gathering at Dunblane felt that there was a need to ensure that momentum of that meeting was maintained, and so we organised a half-day follow up meeting. Around 40 people attended. Part of the Follow up was about analysis of the Vision (which there was insufficient time for at Dunblane) and part for looking at new initiatives. This event benefits the Inventory project directly in terms of contacts and awareness-raising, but also because it enables us to make the project legacy framework coherent with both the collective vision and new initiatives with the orchard community.

The whole presentation given at the Follow-up meeting is given with explanatory notes in Section 6.7 below. One key graph summarises the collective vision:

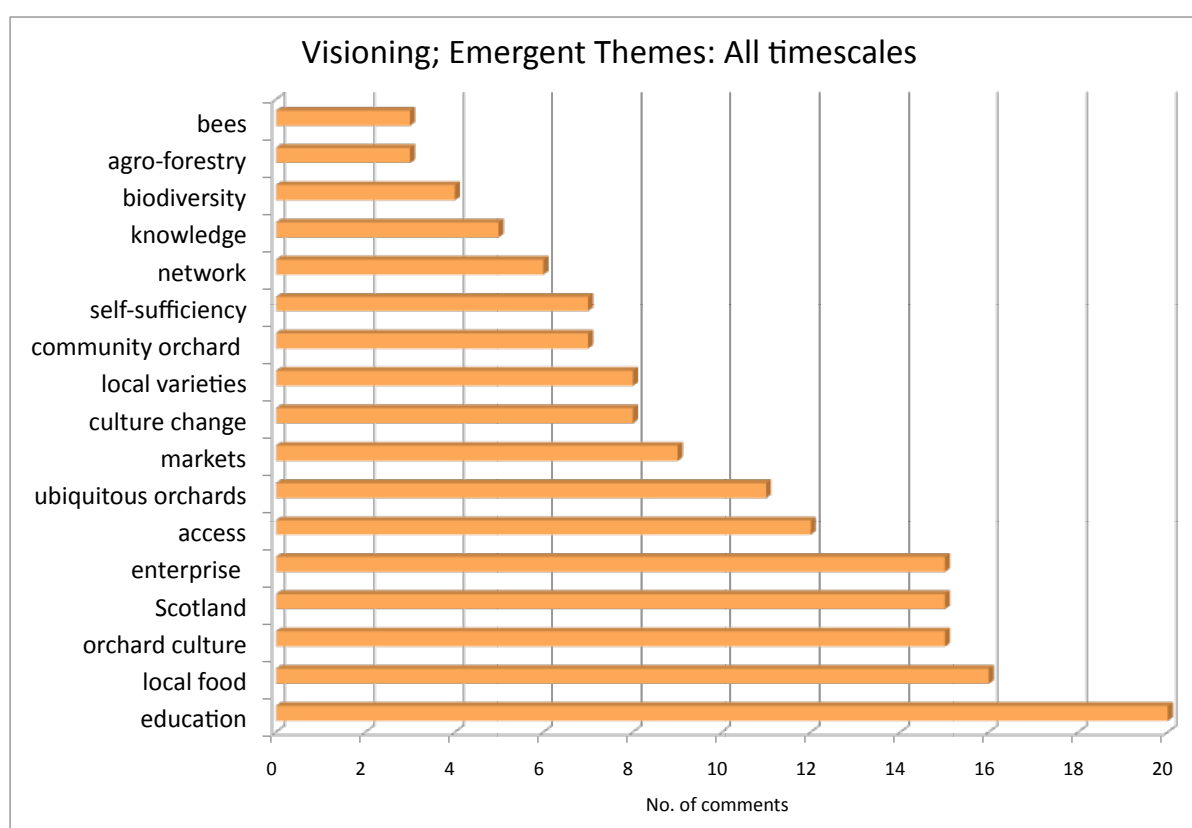


Figure 1: Collective Vision from Orchard Gathering 2014; Emergent Themes

4.2 Learn from pilot; iterate systems & upgrade methodology

4.2.1 Tasks

- Re-order field verification e-form for better user experience, and therefore better data quality
- Improvements to error checking to detect any data corruption issues early
- Minor amendments to database structures to improve relevance of data collected
- Creation of secondary data channel via web form
- Test improvements when opportunities arise

4.2.2 Data collection systems

The form data corruption issue reported in the Phase 2 final report remained unresolved even though the issues were discussed with Adobe *Acrobat Pro* technical support.

The risk of significant failure of the pdf forms was judged too great if the existing system were to be applied to the whole of Scotland. Therefore a new approach was considered. A decision was taken to migrate to web forms and various services were assessed.

Adobe *Forms Central* cloud service was selected because of its versatility, ability to upload files such as photos, and that the web form could be saved as a pdf, and printed for those who preferred to work on paper in the field.

Feedback from the Borders pilot was used to re-order the form, and a matrix of habitat site types was created to directly 'map' site type to EUNIS classification.

Minor amendments to the GIS database structure were made to address issues that we learned of during the previous phase. Other minor inconsistencies were addressed.

The newly designed survey web form was embedded at ScotlandtheFruit subpage. The pdf download version is shown in Section 6.2 below. We had the opportunity to test it with volunteers at Forth Environment Link. It proved successful.

Without any prior indication, an email on 4th Feb 2015 from Adobe advised that their *Forms Central* product was being withdrawn entirely on 23rd Jun 2015. In the interim, we will continue to use these existing web forms, but they will need to be migrated to a new web form service before June 2015.

4.2.3 Additional task: handling new sites & sharing geographic data

Part of the learning from the pilot was how the existing system was unsuited to dealing with new sites that were not part of the deskstudy. This involves demarcating and recording the new sites.

A further issue was the fairly rudimentary way that existing site location data was conveyed. This was achieved using A4 pdf of site layouts, produced by the GIS. This is satisfactory to deliver the data but unsatisfactory when site boundaries need amending for surveyed orchards.

To overcome these issues, a new web mapping delivery was explored, and Google My Maps (with non-public sharing) has been utilised.

A framework of work streams and a number of work procedures was developed to export site data from MapInfo GIS to Google My Maps; to instruct local volunteers and the Local Facilitator how to create or amend site boundaries on Google My Maps; and finally how to extract the new data and import it into the MapInfo GIS. A three layer map was created for each of the 32 local authorities in Scotland. The detail of the processes was presented and discussed at December 2014 Steering Group meeting, and is shown in summary in Section 7.1 below.

The benefits of the new sharing system are:

- Devolves information to local organisations
- Empowers them to undertake the work
- Sharing is relatively secure
- No cost barriers to local organisation
- Low training requirement
- Saves work (and cost) at national level

These are significant and worthwhile benefits for the project.

4.3 Engage with and Develop capacity of local orchard organisations.

4.3.1 Tasks

- Pro-active; engage with network of contacts to identify local organisations. Test their capacity with metrics such as turnover, no. of employees. Test their potential capacity by determining track record of projects, size and activity of managing group, willingness of managing group to take on challenging projects. Engage with managing groups. Facilitate networking between these organisations
- Re-active; having set out stall in public (through web and press awareness-raising) field incoming enquiries from candidate volunteers
- Signpost organisations to third party resources to increase capacity
- Create and provide project templates for field verification. Facilitate applications for match-funding for field verification.
- Arrange for local organisation to recruit volunteers and provide mechanisms to do this
- Agree geographical areas to be covered by local organisations
- Identify candidate Local Facilitators, and determine suitability; key criteria being volunteer management, organisational skills, and ability to manage data receipt and error checking competently.
- Tour to meet candidate Local Facilitators in person, and to engage with key persons in local organisations.
- Agree in writing field implementation with local organisations, and where possible their subcontract with Local Facilitator

4.3.2 Engagement

This has been and continues to be the most significant task in terms of volume of activity.

Through events, the gatherings and various other sources, a pro-active engagement of groups across Scotland has been undertaken.

A framework of recruitment resources was created at the project's website – this together with the awareness-raising activities set out our stall. The web resources also comprise:

- Volunteer page with web form. This collects relevant details but also tests their ability and willingness to fill in a web form competently – a crucial skill needed.
- Collaborate page for organisations; web form. This collects data to determine if the organisation is suitable as a conduit for funding, as well as details to help determine how dynamic and effective it is.
- Count Our Orchard In; web form. To handle email enquiries about 'straggler' orchards a mechanism was created to record them, and during the field verification phase our GIS Officer will process them as a batch. In the meantime, it provides another route to engage with the public.

Web forms are shown in Sections 6.3 to 6.5, or see subpages of ScotlandtheFruit.org

Recruitment of volunteers and collaborating organisations was initially carried out through the aware-raising activities given in Section 4.1 above. In late 2014 it became clear that the scale of recruitment was disappointing, and insufficient for the purposes of the project.

As a result a more pro-active approach was taken, involving identifying specific groups and individuals, and contacting them to begin a recruitment process.

Work streams were created to manage both organisational and volunteer recruitment which are shown in Section 7.2 below.

This work is far from complete, and needs to continue in a next phase of the project.

The length of time for decision making by groups has been longer than anticipated (Again

the old issue of lack of capacity in the voluntary sector is encountered.)

Through the engagement process it has become clear that few groups have the capacity or focus to handle a whole local authority area. So the outcome is that the project will have to handle relationships with 50 – 100 local organisations, which is a larger task. However, this does not call into question the local host model that we have designed for the project – it means that more organisations can be benefited.

Geographical areas. The engagement process is also a process of identifying and agreeing geographical areas for a local group to cover. Obviously the distribution of orchards is not uniform, and we need to cover those areas where the Deskstudy found candidate sites. This often stretches the boundaries that groups normally work to. This is a process of negotiation.

Though touring to meet management groups was identified as a task, it has been shown to be unfeasible with the budget of the current project. A visit was made to Ayr, specifically to address a meeting hosted by collaborators Scottish Smallholders Association. A face-to-face meeting with the chair of Girvan Community Garden was also conducted. Both were useful and it is likely that we have identified groups to host much of South Ayrshire, East Ayrshire, and North Ayrshire – however it is far too time consuming to recruit groups across Scotland in this manner.

Therefore phone and email remain our dominant mode of communications to recruit organisations and volunteers.

Further face-to-face meetings with representatives of other groups have been carried out, as opportunities arose.

Local Facilitators are being drawn from volunteers and organisational contacts. However, identifying the local host is the preliminary step as it is that organisation who will need to contract or employ the facilitator. Much of the work of data handling has now been removed from the Local Facilitator's role due to the introduction of the web form which includes photo file upload. However, volunteer management, allocation of sites, ensuring delivery, and general support at a local level mean that this is a crucial role.

A series of organisational resources and suggested funding sources are being created and will be delivered via a dedicated webpage. These will signpost to high quality free resources such as those provided by SCVO.

4.4 Cost & programme rollout across Scotland

4.4.1 Tasks

- Determine projected costs of field verification across Scotland
- Create programmes for national organisation and local organisations
- Create project information pack
- Identify potential funders

4.4.2 Conceptual framework for the wider project

A more comprehensive conceptual framework for the wider project was developed during the course of this contract.

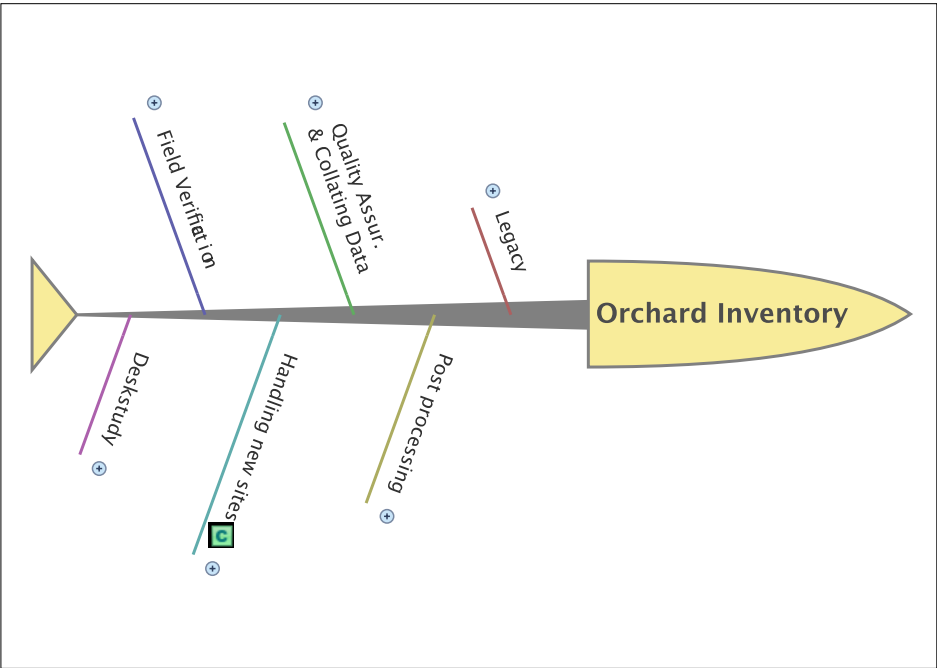


Figure 2: Conceptual Framework of a National Orchard Inventory for Scotland

What we have been terming to date as a ‘wider project’ is *de facto* a programme of projects. Detail of the proposed elements in the early & late parts of the programme are shown below.

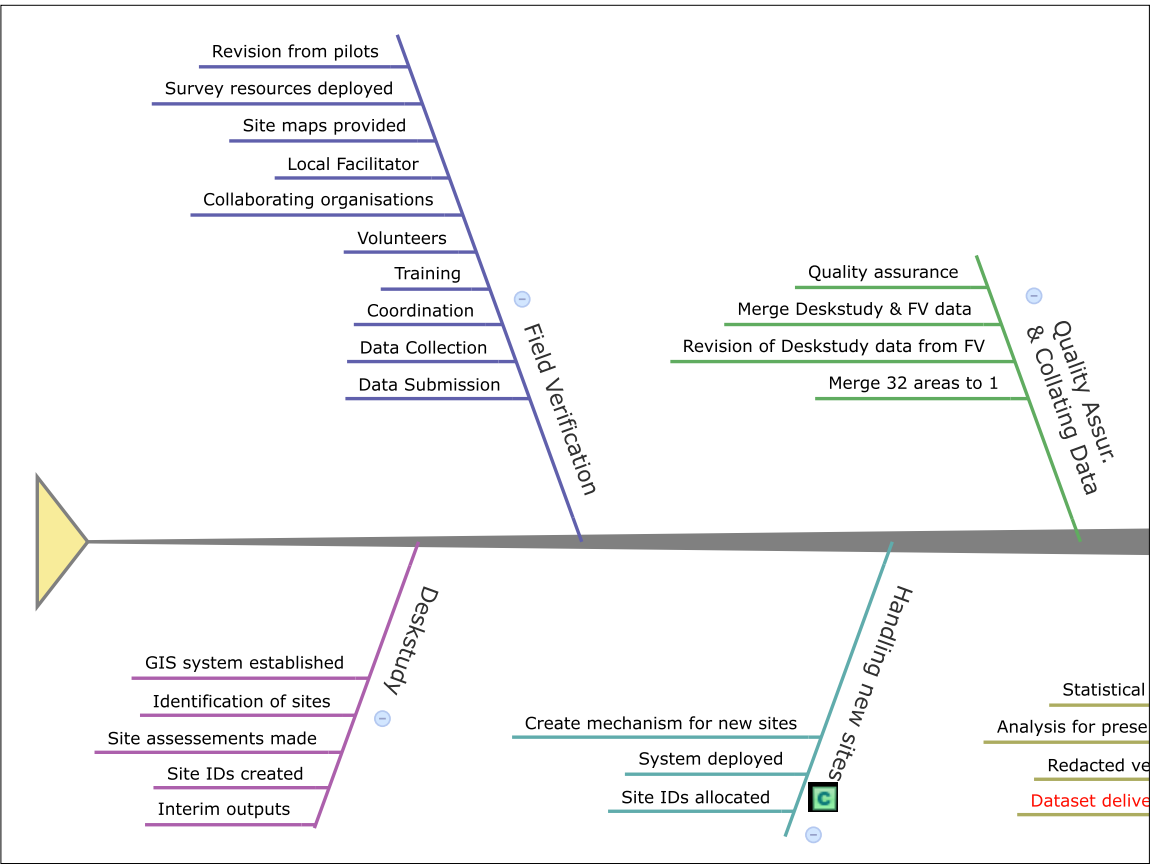


Figure 3: Excerpt of Detail of early parts of the Conceptual Framework

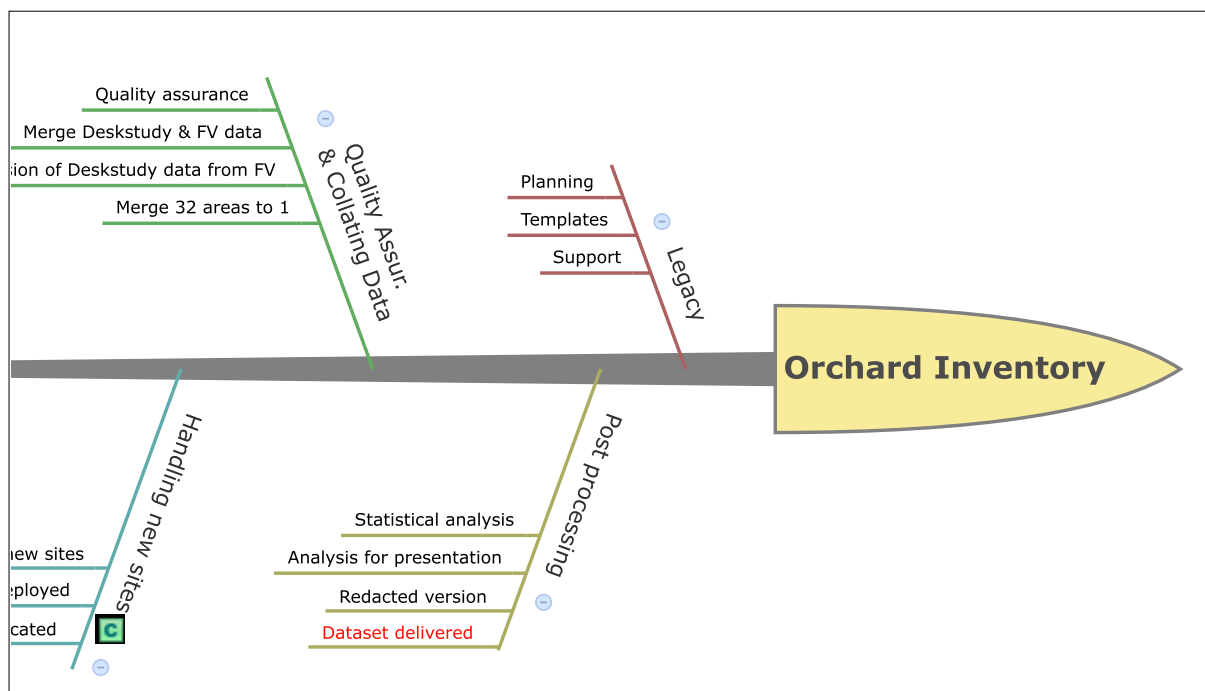


Figure 4: Excerpt of Detail of later parts of the Conceptual Framework

4.4.3 Rollout plan

Using the conceptual framework above, a Work Breakdown Structure (WBS) was created, and Resources allocated to it. This enabled a proposed budget to be created for the next phase of the project, and on the advice of the client this over two years. The budget continues to evolve. The summary of the current version of the budget is shown in Section 7.4 below together with a breakdown by resource. Fine detail is provided in the 'WBS and Costing Ph4' spreadsheet.

The programme of works has been devised to the extent of activity start and finish dates, and these are contained with the same spreadsheet.

The project information pack currently includes the following documents:

- Resources on the project website at www.ScotlandtheFruit.org
- Email and telephone scripts, including that given in Section 6.8 below
- Memorandum of Understanding
- Project template for Field Verification, given in Section 6.9 below.

A funding model has been created to discuss and agree how various sources of funding interact with the various project partners. The current model is shown in 7.5 below.

Funders have been identified in consultation with the client and other parties. One fund has been applied to, applications and proposals are being prepared for the balance of funding. Details are given in 7.5 below.

4.5 Plan legacy

4.5.1 Tasks

Create suite of project templates for legacy work. Diverse themes to be included in the legacy. From tangible orchard products, through skilling up & outdoor activity to cultural outputs such as oral history.

4.5.2 Legacy plans

The gathering visioning has usefully informed the type of projects that seem to be worthwhile and feasible. The 'vision emergent themes' are mapped as 'project themes' in the templates given.

Anecdotal evidence from organisations also supports the case that education – including training such as pruning and other skills – is very popular with the public. Culture is another key factor.

A suite of project templates has been developed to an early stage, and the outlines are given in Section 7.6 below. These are not intended for publication at this stage, and should be developed further in the forthcoming Phase 4 for deployment.

5 CONCLUSION

This phase of creating a National Orchard Inventory for Scotland has provided an essential stepping-stone in preparing to roll out the field verification work across the country.

Though recruiting organisations and Local Facilitators has been slower than anticipated, systems have been created to continue that work in a methodical and transparent manner.

Significant improvements have been made to data collection systems; these are providing greater robustness and thus reduced risks. They are also more cost effective and better at sharing data with those who can effectively use them.

Engagement with organisations and individuals through events has been a further significant positive benefit from this phase, and this bodes well for the future of Scottish orchards.

6 ANNEX A: PUBLIC DOCUMENTS

6.1 Project profile and media FAQs

Project Profile & Media FAQs

Preparing for the survey fieldwork in autumn 2015

Project: A National Orchard Inventory for Scotland

prepared by Crispin Hayes on behalf of the project partners

v. 23feb15

Key messages:

- We're currently seeking community organisations and volunteers across Scotland to collaborate with on the survey fieldwork in autumn 2015.
- We've already done a deskstudy: that found a lot more orchards have been located in Scotland than anticipated. It looks like there will be in excess of 1500 orchards confirmed once the fieldwork is done.
- Feedback from volunteer surveyors in the Scottish Borders pilot area is that they really enjoyed being part of the project. We need to recruit volunteer surveyors from across the rest of Scotland to be involved the next phase. The project website www.scotlandthefruit.org has the details.
- While there are many new smaller orchards being planted, our large traditional orchards are still in decline, and the nation is in danger of losing them entirely. The large traditional orchards contain many veteran trees – some have pear trees up to 300 years old. This is living heritage.
- Project website www.scotlandthefruit.org

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.....more

Scottish Natural Heritage is the lead organisation from the public sector, and has contracted coordination responsibilities to date to Dr Crispin Hayes of CW Hayes Associates.

Who are the Project Partners ?

In addition to the above, Third Sector and community organisations have played a major role as project, indeed building capacity in the local Third Sector is a subsidiary aim.

At a national level, Scottish-based NGO Orchard Revival www.orchardrevival.org.uk has been provided key web resources and London-based People's Trust for Endangered Species have contributed to the Geographical systems.

National Trust for Scotland have supported the project nationally.

At a local level, Borders Forest Trust have been partners is implementing the pilot fieldwork. We are engaging with many more similar organisations across Scotland for local delivery in their areas.

How is it funded ?

To date Scottish Natural Heritage have commissioned the research, but the national rollout will be co-funded from a number of charitable sources.

Where's the project website?

www.scotlandthefruit.org

What are the results from the project so far ?

The deskstudy across Scotland was completed in early 2014 and showed:

- 1859 sites considered
- 1728 proposed as candidate orchards to go forward to field survey
- Orchards found in 31 out of 32 Unitary Authority areas.
- South Lanarkshire, followed by Fife have the largest number of candidate orchards, at 213 and 186 respectively
- Dumfries & Galloway, Highland, Perth & Kinross and Scottish Borders all have over 100 candidate orchards.
- The total area of candidate orchards is 714 hectares. This includes mixed habitats such as garden areas or walled gardens that contain an orchard.
- South Lanarkshire has the largest area with 133 hectares, much of which is found in the Clyde Valley.
- Perth & Kinross follows up with 87 hectares, including the Carse of Gowrie.
- Aberdeenshire, Dumfries & Galloway, Fife, Highland, North Lanarkshire, and the Scottish Borders all have more than 30 hectares each.

The field survey pilot in the Scottish Borders was carried out in late 2013, it showed:

- 101 orchards are confirmed to exist in the Scottish Borders
- 42 sites were confirmed not to be orchards or contained less than 5 fruit trees
- most orchards were found in private gardens but estate orchards and walled gardens also made up significant numbers
- eating apples predominated, while half the orchards contained cooking apples, pears and plums.
- walnut and cobnut are grown in small numbers
- over 2000 fruit trees were individually recorded across the Scottish Borders
- significant quantities of veteran tree features were recorded indicating high biodiversity in many orchards
- Size: most orchards have up to 30 trees. Three orchards recorded more than 100 trees.
- Age: Many orchards are mixed age, but most also contain old trees.
- Management: the majority of orchards have at least some management but a fifth are abandoned or have no management.
- Use of fruit: for most orchards fruit is used within the family or given away to friends. Many orchards also have fruit left on the ground. Very little selling of fruit is done.

Where's the interim report published ?

The draft interim report is available for download at www.scotlandthefruit.org

What's happening now ?

During 2014-15, we are preparing for a rollout of fieldwork across Scotland during the late summer and autumn of 2015. Because this is a collaborative project, and we want to keep things as local as possible, we're engaging with local groups and recruiting volunteers.

At a national level we are providing survey resources; location maps, survey forms, training for volunteers, as well as coordinating groups, and preparing to collate the large amount of data that will emerge.

6.2 Survey Web Form

Creating a National Orchard Inventory for Scotland; Working for Orchard Revival

Orchard Survey Form v3

Please help us to secure Scotland's orchard heritage.

Identification

Orchard ID: Your group: Date of Survey: Summary: Orchard present now
☐ yes ☐ no

Surveyor name: Name of Orchard Keeper:

Location Details

	For Orchard Location	For Keeper (if different)
House name	<input type="text"/>	<input type="text"/>
Street	<input type="text"/>	<input type="text"/>
Town/ village	<input type="text"/>	<input type="text"/>
County	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Email (if available)	<input type="text"/>	<input type="text"/>

Grid ref is at base of site location maps, if no map then use an OS map or GPS to determine location

OS Grid ref: OS X (Eastings) OS Y (Northings)

or WGS84 from GPS. Latitude (degrees) Longitude (degrees)

Local Authority Area:

Keeper permission to enter site? ☐ given ☐ refused ☐ not determined

What Kind of Fruit Trees ? (tick all that apply, and give numbers if known)

Apple <input type="checkbox"/>	Apple no. <input type="text"/>	Pear <input type="checkbox"/>	Pear no. <input type="text"/>
Crab-apple <input type="checkbox"/>	Crab-apple no. <input type="text"/>	Plum <input type="checkbox"/>	Plum no. <input type="text"/>
Damson <input type="checkbox"/>	Damson no. <input type="text"/>	Cherry <input type="checkbox"/>	Cherry no. <input type="text"/>
Greengage <input type="checkbox"/>	Greengage no. <input type="text"/>	Mulberry <input type="checkbox"/>	Mulberry no. <input type="text"/>
Quince <input type="checkbox"/>	Quince no. <input type="text"/>	Medlar <input type="checkbox"/>	Medlar no. <input type="text"/>
Cobnut <input type="checkbox"/>	Cobnut no. <input type="text"/>	Other <input type="checkbox"/>	
Walnut <input type="checkbox"/>	Walnut no. <input type="text"/>	Other details	<input type="text"/>

Known varieties (list if known. If a large number submit a separate Word or Excel or photo of list, using the file upload at end of form)

Use of Fruit

Is the fruit used ? ☐ yes, a lot ☐ yes, a bit ☐ little or none used

How is the fruit used ? (tick all that apply)

<input type="checkbox"/> Family use	<input type="checkbox"/> Jams, preserves, products	<input type="checkbox"/> Sold locally
<input type="checkbox"/> Given away to friends	<input type="checkbox"/> Fruit ignored and left on ground	<input type="checkbox"/> Sold commercially

Other use:

Stewardship and Land Management Contracts. Is the orchard:

part of a stewardship or similar scheme? ☐ yes ☐ no ☐ was in past ☐ applying to be

Is the orchard registered under IACS ? ☐ yes ☐ no ☐ was in past ☐ applying to be

Orchard Management

Pruning & general care. (tick most appropriate) ☐ Actively managed ☐ Some management ☐ Unmanaged ☐ Abandoned

Chemical sprays; any use of herbicides, pesticides, fungicides etc? ☐ yes ☐ no

Details

Type of Orchard Site (tick most appropriate)

☐ Walled garden (not beside house) mainly cultivated, ie. bare soil

☐ Walled garden (not beside house) mainly un-cultivated, urban

☐ Walled garden (not beside house) mainly un-cultivated, rural

☐ Field size or estate orchard, large trees, uncultivated

☐ Field size or estate orchard, large trees with undercrops

☐ Remnants of field orchard over pasture, sparse large trees remain

☐ Hedgerow fruit trees

☐ School or Community orchard, well stocked > 30% canopy cover

☐ School or Community orchard, sparse <30% canopy cover

☐ Park, Large (>5ha), mixed habitat

☐ Park, Mid sized (0.5ha-5ha), mixed habitat

☐ Park, Small (<0.5ha), mixed habitat

☐ Other

☐ Domestic garden (by house) mainly cultivated, ie. bare soil

☐ Domestic garden (by house) mainly un-cultivated in rural area

☐ Domestic garden (by house) mainly un-cultivated in urban area

☐ Field size or estate orchard, shrub trees, uncultivated

☐ Field size or estate orchard, shrub trees with undercrops & berries

☐ Allotment, mainly cultivated

☐ Greenhouse

☐ Large market garden, containing orchard

☐ Small market garden, containing orchard

☐ Orchard lost to development

☐ Derelict or abandoned orchard

Veteran tree features present. (tick any that apply for any fruit trees)

☐ Clearly aged trees ☐ Crevices in bark ☐ Mistletoe ☐ Holes in branches

☐ Trunk cavities ☐ Loose bark ☐ Standing deadwood in tree ☐ Deadwood on ground

☐ Deadwood in canopy ☐ Water pools on tree ☐ Sap runs ☐ Fungal fruiting bodies

Number of Fruit Trees

Firstly OLD fruit trees (those over about 50yrs old or showing veteran features), secondly YOUNGER fruit trees

OLD trees, approx how many ? ☐ 1-10 ☐ 11-30 ☐ 31-100 ☐ 101+

YOUNGER (<50yrs) trees, approx how many ? ☐ 1-10 ☐ 11-30 ☐ 31-100 ☐ 101+

Total number of OLD fruit trees (if known)

Total number of YOUNGER fruit trees (if known)

Age Range of Fruit Trees (tick all that apply)

☐ New (less than 8yrs) ☐ Young (9-20yrs) ☐ Mid (21-50yrs) ☐ Old (50yrs +)

Known ages of plantings. (attach a file or photo of list if available)

Size of Fruit Trees

Height. Proportion less than 5m high (%)

Proportion higher than 5m high (%)

Remarkable or unusual trees. Are there any in this orchard ☐ yes ☐ no

If yes, then note their girth (circumference at breast height in cm) along with comments below. Take a photo

Details of remarkable trees

Orchard Floor

What is main vegetation on orchard floor? (tick any that significant presence)

- ☐ Grass ☐ Lawn ☐ Brambles ☐ Nettles ☐ Thistles
☐ Other tall weeds ☐ Unimproved pasture ☐ Improved pasture ☐ Scrub ☐ Cultivated
☐ Other

How is the orchard floor managed? (please tick any that apply)

- ☐ Grazing ☐ Rotary mower ☐ Finger mower ☐ Strimmer ☐ Herbicide ☐ Unmanaged

Grazing animals (please tick any that apply)

- ☐ Sheep ☐ Cattle ☐ Horses ☐ Pigs ☐ Fowl

☐ Other

Is there any evidence of herbivore damage to fruit trees, such as stripped bark or damaged roots

- ☐ yes ☐ no

Details of mowing or grazing or damage (if available)

Undercrops grown

- ☐ Gooseberries ☐ Currants ☐ Raspberries ☐ Other soft fruit ☐ Vegetables
☐ Other

Neighbouring habitats; what are there ?

- ☐ Hedgerows ☐ Ponds ☐ Mature trees ☐ Unmanaged areas ☐ Woodland

Any other comments, anecdotes & notes

Data Protection

We take data protection seriously. Survey information will be shared solely with project partners. Anonymised data may be passed to third parties or placed in the public domain, along with existing publicly available data relating to the orchard site. Survey information will be stored and processed on computer. Registered at the Information Commissioners Office as a Data Controller.

Location map boundary. Does the map show the boundary of the orchard accurately? If no, please send amendments.

- ☐ yes ☐ no

Photos. Have you taken any of the site?

(please remember to include the 8 digit ID at the start of ALL filenames!)

- ☐ yes ☐ no

How long has it taken for this site visit (to nearest 10mins)

Thank you and please thank the orchard keeper

Photo and Files Upload for this Orchard


It is "essential" that all files have the 8 digit Orchard ID at the start of all file names. Without this we cannot connect them to any site ! Please check you've done this.

Upload photos and other files using the button multiple times

If you want to save a partially filled form, then put your email here and a link will be sent so that you can return to the same incomplete form.

6.3 Volunteer web form

Volunteering in the National Orchard Inventory Project



Tell us a few details:

First Name Family Name

Do you want to be a voluntary surveyor ? ☐ yes ☐ no ☐ perhaps

Are you an orchard owner or keeper ? ☐ yes ☐ no

Would you like to be kept informed ? ☐ yes ☐ no

Experience

Have you done any outdoor fieldwork before ?

☐ yes ☐ no

Have you done any survey or visiting sort of work ?

☐ yes ☐ no

What sort of outdoor work was it ?

What sort of survey or visiting did you do?

How much do you agree with these statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I would really enjoy talking to people about their orchards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I'm happy using a computer to fill in a form like this	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I'm happy using a map to locate a site	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Local involvement ?

Are you a member of any local groups ?

eg. Orchard groups, Development Trust, Local Action Group, Community Council

any group website ?

Are there any other local groups you are aware of, even if you are not a member of them.

We are planning field survey work for Autumn & late Summer 2015.

Would you be able to some
fieldwork in that period?

☐ yes

☐ no

Anything in particular interest you about this project ?

Your contact details:

Addr1: House, street

Addr2:

Addr3: Town

Local Authority or County

Post Code

Phone1

Phone2

E-mail1

E-mail2

Data Protection: By submitting this form, you agree that data provided can be used by the project partners.
Personal data may be shared with project partners but will NOT be passed to any other parties.

Thanks very much for your interest. We'll get back to you soon.


Any further queries please email us

volunteers@scotlandthefruit.org.uk

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6.4 Collaborate web form

Local organisations that want to Collaborate in the National Orchard Inventory Project



Tell us a bit about your organisation and we'll see the best way to collaborate:

Volunteers will carry out the field survey work; training and survey materials are provided by us.
Would your organisation be interested to collaborate in facilitating the field survey work in your area?

☐ yes ☐ no ☐ perhaps

And would it be interested in receiving match-funding to carryout this role?

☐ yes ☐ no ☐ perhaps

We are planning field survey work for Autumn & late Summer 2015.

Would the organisation be able to collaborate in that period?

☐ yes ☐ no

Anything in particular interest you about this project ?

About the work your organisation does

What sort of work does the organisation do ? (tick any that apply)

<input type="checkbox"/> Orchard or fruit trees	<input type="checkbox"/> Woods and trees	<input type="checkbox"/> Garden or growing veg
<input type="checkbox"/> Other outdoor stuff	<input type="checkbox"/> Community development	<input type="checkbox"/> Food or cooking

How wide an area does the organisation work over ?

What is the organisation's best recent project?

Is there a report or webpage about that project ? If so, paste web address url here.

How your organisation is set up and run

Does the organisation have a written constitution ?	<input type="radio"/> yes	<input type="radio"/> no
	<input type="radio"/> don't know	
Does the organisation have its own bank account ?	<input type="radio"/> yes	<input type="radio"/> no
Does your organisation have public & employer (& volunteer) liability insurance ?	<input type="radio"/> yes	<input type="radio"/> no
What sort of organisation are you ? (tick all the apply)		
<input type="checkbox"/> Unincorporated body	<input type="checkbox"/> Company limited by guarantee	
<input type="checkbox"/> SCIO	<input type="checkbox"/> Charity	
<input type="checkbox"/> CIC	<input type="checkbox"/> subsidiary of other organisation	
<input type="checkbox"/> Co-operative	<input type="checkbox"/> Other	
How many people are currently on your management committee or board ?	<input type="text"/>	
Approximately how many times a year does it meet ?	<input type="text"/>	
Do you have any paid staff at the moment ?	<input type="radio"/> yes	<input type="radio"/> no
How many full or part-time staff ?	<input type="text"/>	
How many regular volunteers ?	<input type="text"/>	
What (roughly to the nearest £5k) is the annual turnover of the organisation?	<input type="text"/>	

Your position in the organisation (tick any that apply)

<input type="checkbox"/> Member	<input type="checkbox"/> Employee	<input type="checkbox"/> Office holder
<input type="checkbox"/> Board or Committee member	<input type="checkbox"/> Director or Trustee	<input type="checkbox"/> Volunteer

Your name:

First Name	Family Name
<input type="text"/>	<input type="text"/>

Organisation contact details:

Organisation name

Addr1: Building, Street name	Addr2:	Addr3: Town
<input type="text"/>	<input type="text"/>	<input type="text"/>

Local Authority or County	Post Code
<input type="text"/>	<input type="text"/>

Phone1	Phone2
<input type="text"/>	<input type="text"/>

E-mail1	E-mail2
<input type="text"/>	<input type="text"/>

Data Protection: By submitting this form, you agree that data provided can be used by the project partners. Personal data may be shared with project partners but will NOT be passed to any other parties.

Thanks very much for your interest. We'll get back to you soon.

Any further queries please email us crumble@scotlandthefruit.org.uk

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6.5 Count Our Orchard In web form

We've got an orchard.

Is it being included in the National Orchard Inventory for Scotland?

Please give us a few details; we will check and get back to you.

Location of Orchard

OS Grid ref: OS X (Easting) OS Y (Northings)

or WGS84 from GPS. Latitude (degrees) Longitude (degrees)

Help ! I don't have an OS map or GPS to do this, what do I do?
 Easy; you can use www.streetmap.co.uk to find the coordinates.
 Go to that website, enter a postcode near the orchard. Zoom in and locate the orchard area.
 Use the 'Move arrow' tool and click on your orchard, and the coordinates will be displayed.

Local authority area

Postcode nearest the orchard

Type of Orchard (tick any that apply)

☐ Private Garden (by house)
☐ Allotment
☐ School orchard
☐ Community orchard
☐ Public park
☐ Derelict or abandoned orchard
☐ Field size orchard
☐ Estate orchard
☐ Walled garden
☐ Greenhouse
☐ Modern commercial orchard
☐ Other

Other comments

Total number of fruit trees

Are you orchard keeper ?

☐ no, someone else is
☐ yes, I'm the owner
☐ yes, I'm the tenant
☐ we manage it as a community or group

Your contact details:

First Name Family Name

Addr1: House, street Addr2: Addr3: Town

Local Authority or County Post Code

Phone1 Phone2

E-mail1

E-mail2

Data Protection: By submitting this form, you agree that data provided can be used by the project partners. Personal data may be shared with project partners but will NOT be passed to any other parties.

Thanks very much for your interest. We'll get back to you soon.

Any further queries please email us crumble@scotlandthefruit.org.uk

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6.6 Inventory Story So Far; presentation to Orchard Gathering 2014

Held at Dunblane, 7th November 2014. At the time of writing, the full presentation can also be seen on the project website.

a National Orchard Inventory for Scotland
project funded by Scottish Natural Heritage

Project Manager: Crispin W. Hayes, CW Hayes Associates

THE INVENTORY STORY SO FAR

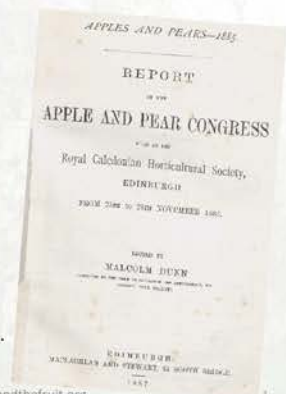
Project partners:
Scottish Natural Heritage Borders Forest Trust National Trust for Scotland
People's Trust for Endangered Species Orchard Research & Enterprise CIC

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1

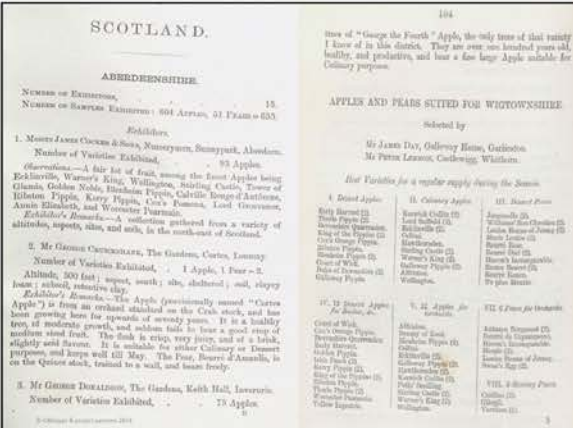
What is it?

- it's a list of where orchards are and what there like
- when was it last done?
– well it wasn't but the 1885 Congress documented 100s of orchards in Scotland...



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2



SCOTLAND.
ABERDEENSHIRE.
NUMBER OF EXHIBITORS, 15.
NUMBER OF BASKETS EXHIBITED, 804. Apples, 51 Pears, 633.

Exhibitors.
1. Messrs James Cockran & Sons, Nurserymen, Broompark, Aberdeen.
Number of Varieties Exhibited, 92 Apples.
Remarks.—A fair lot of fruit, among the best Apples being Ecklonville, Warner's King, Wellington, Striving Castle, Tower of Glenda, Golden Noble, Buchanan's Pippin, Catherine Tongue of Antares, Anna's Elmshurst, and Worcester Pippin.
Exhibitor's Remarks.—A collection gathered from a variety of situations, mostly sites, and soils, in the north-east of Scotland.

2. Mr GEORGE CHURCHMAN, The Gardens, Catter, Lanark.
Number of Varieties Exhibited, 1 Apple, 1 Pear—3.
Remarks.—The Apples (previously named "Catter Apples") are from an orchard situated on the Catter stock, and have been growing here for upwards of seventy years. It is a healthy medium sized tree. The fruit is crisp, very juicy, and of a pale, slightly acid flavor. It is suitable for either Culinary or Dessert purposes, and keeps well till May. The Pear, known as Annan's, is on the Queen stock, trained to a wall, and bears freely.

3. Mr GEORGE DONALDSON, The Gardens, Keith Hall, Inverurie.
Number of Varieties Exhibited, 73 Apples.

3

Why do it now ?

Lot of reasons - these are the reasons we think it is worthwhile:

- orchards are an important part of our **landscape** for many reasons; local tasty fruit, part of cultural heritage, pretty blossom in the Spring, local business that uses the fruit, valuable habitat for birds and beasts – and so on.
- our longstanding traditional orchards are in decline, and have been for many decades. We are approaching a **critical phase** – we need to do something now to ensure their survival.
- knowing what is out there – across Scotland – will give us all a lot of information about where best to **target attention**, and who to engage with.

Have you got any to add ?

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4

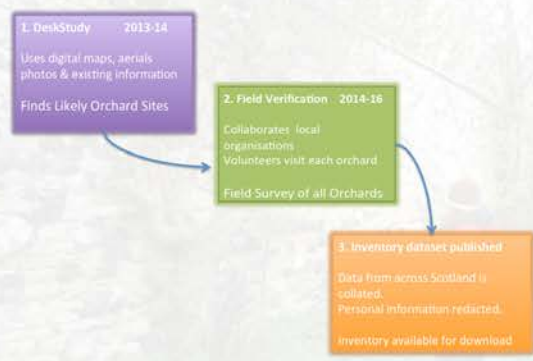
How many trees makes an orchard ?

- For the purpose of this work we are defining an orchard as **5 or more fruit trees** that are within 20m apart from crown edge to crown edge.

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5

How does the process work?



```

graph TD
    A["1. DeskStudy - 2013-14  
Uses digital maps, aerials  
photos & existing information  
Finds Likely Orchard Sites"] --> B["2. Field Verification - 2014-16  
Collaborates local  
organisations  
Volunteers visit each orchard  
Field Survey of all Orchards"]
    B --> C["3. Inventory dataset published  
Data from across Scotland is  
collated.  
Personal information redacted.  
Inventory available for download"]
  
```

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6

What are the results so far?

1. DeskStudy 2013-14

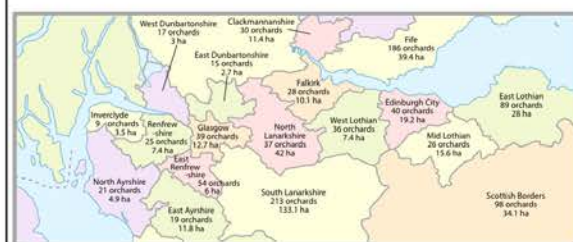
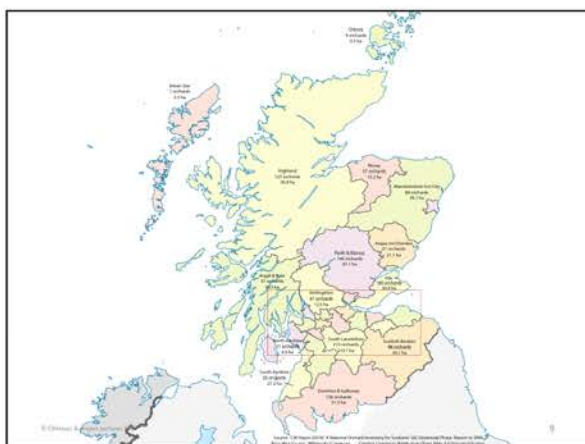
Finds Likely Orchard Sites

More than we expected . . .

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- 1859 sites considered
- 1728 proposed as candidate orchards to go forward to field survey
- Orchards found in 31 out of 32 Unitary Authority areas.
- South Lanarkshire, followed by Fife have the largest number of candidate orchards, at 213 and 186 respectively
- Dumfries & Galloway, Highland, Perth & Kinross and Scottish Borders all have over 100 candidate orchards.
- The total area of candidate orchards is 714 hectares. This includes mixed habitats such as garden areas or walled gardens that contain an orchard.
- South Lanarkshire has the largest area with 133 hectares, much of which is found in the Clyde Valley.
- Perth & Kinross follows up with 87 hectares, including the Carse of Gowrie.
- Aberdeenshire, Dumfries & Galloway, Fife, Highland, North Lanarkshire, and the Scottish Borders all have more than 30 hectares each.

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Full report of Deskstudy is available for download at www.scotlandthefruit.org

www.scotlandthefruit.org

1

What now ?

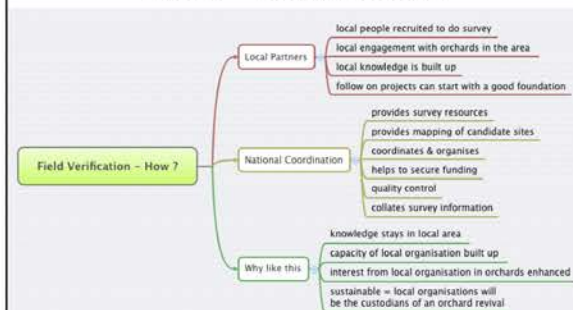
2. Field Verification 2014-16

Field Survey of all Orchards

- already piloted with Borders Forest Trust
- over 100 orchards verified in Scottish Borders

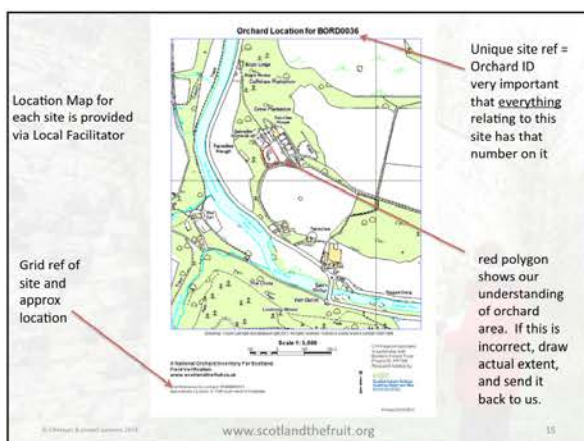
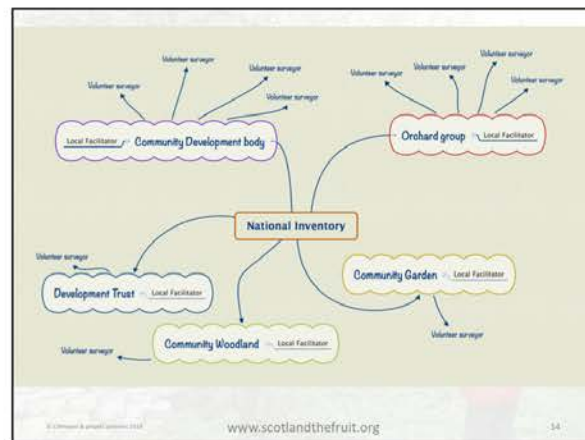
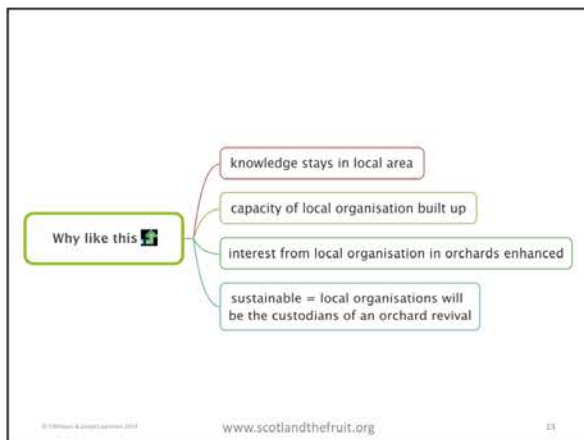
www.scotlandthefruit.org

How? - Collaboration



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1



How to be involved – at least 3 ways

- **Volunteer surveyor** in your area
 - training provided
 - survey materials and methods ready to use
 - as few or as many visits as you like
 - feedback from Borders pilot was they really enjoyed it
- **Local organisations** act as a hub and host in your area. Collaboration.
 - **Local Facilitator** contracted to organise volunteers in your area
 - Methods & systems provided
 - Match funding available

RECRUITING NOW - see website for details

www.scotlandthefruit.org



6.7 Analysis of visioning at Orchard Gathering 2014

This analysis was presented at the Gathering Follow up meeting in Edinburgh on 21st February 2014. At the time of writing, the full presentation can also be seen on the project website.



Most of the afternoon at Orchard Gathering 2014 was dedicated to a workshop to:

1. develop a collective vision,
2. identify opportunities & resources, and finally to
3. determine wise next steps.

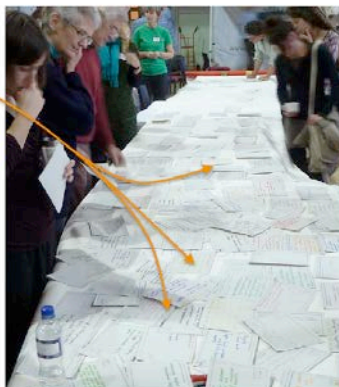
The workshop was run on a 'World Café' format.

Why review this now ?

- Gathering 2014 produced a lot of 'stuff'
- that raw stuff is transcribed to: <http://orchardgathering.weebly.com/>
- along with video & slides, etc

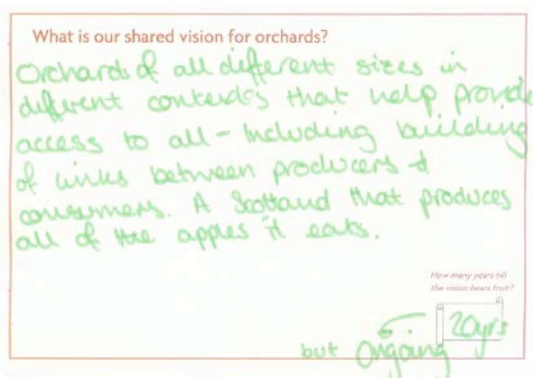
However - we didn't have time to:

- properly group that stuff into emergent themes
- share & discuss those themes



The scale of ideas input to the World Café was significant; each of the three steps generated around 60 comment sheets.

Emergent Theme Tags



So for this comment:

- diverse orchards
- access
- local food
- markets
- Scotland
- self-sufficiency



wanting to ensure that this analysis has transparency & trust

To provide a more coherent understanding of Vision ideas that were shared at Orchard Gathering 2014, each comment sheet was analysed, and emergent themes were allocated the relevant 'tags'.

This slide provides an example of how tags for emergent themes were determined.

This is provided to demonstrate a transparent process of analysis.



The biggest text has the most supportive comments in these word clouds.

Vision within 5 years focuses on:

local food,
education,
enterprise,



The biggest text has the most supportive comments in these word clouds.

Vision for 5 to 10 years focuses on

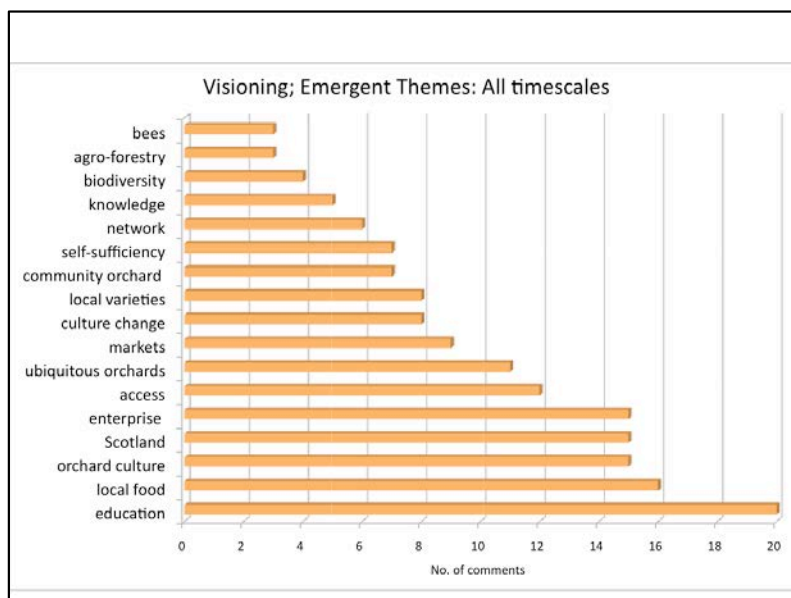
local food, Scotland,
education,
community orchard,
enterprise, and
access.



The biggest text has the most supportive comments in these word clouds.

Vision for 10 years and beyond focuses on:

local food,
Scotland,
self-sufficiency,
access,
culture change, and
orchard culture.



In a more prosaic way this graph shows emergent themes for the **Vision** at all timescales; from the present to inter-generational periods.

The graph displays themes that have at least 3 supporting comments.

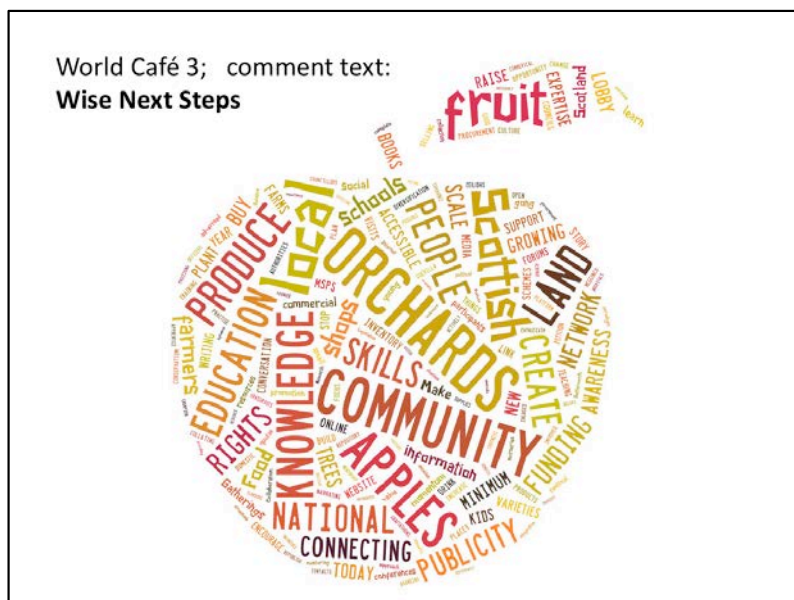
The dominant themes are clearly **education, local food, orchard culture, Scotland, and enterprise.**



A word cloud of all comment text is shown for **Opportunities & Resources**.

The biggest text has the most supportive comments in these word clouds.

These comments have not been subject to analysis of emergent themes. It is clear that **people, knowledge, community, Scottish and land are the focus for comments**.



A word cloud of all comment text is shown for **Wise Next Steps**.

These comments have not been subject to analysis of emergent themes.

The biggest text has the most support in these word clouds.

It is clear that the focus for Wise Next Steps is **community, apples, knowledge, education, land, produce, fruit and Scottish**

6.8 Project Information for collaborating organisations

Below is an example of a script that is included in email when engaging with organisations. It constitutes part of the information pack available to prospective collaborators.

What does local hosting of the Orchard Inventory mean ?

The project is designed to keep knowledge local and to grow the capacity of local organisations. So in doing the fieldwork, we are collaborating with local organisations to run the survey in their area.

We provide all the resources such as such methods, forms, and so on. The local organisation employs or contracts a Local Facilitator to run project.

We provide part of the **funding for that post**. The local organisation can arrange for match funding.

The first step is to do the wee form for Collaborating organisations. It is not binding but just gives us some information to ensure that we can pass funding to you. The form is at

<http://www.orchardrevival.org.uk/inventory-scotland/collaborate/>

What does the Local Facilitator do ?

The Local Facilitator's principle tasks are:

- recruit and organise volunteer surveyors
- allocate orchards to be surveyed
- facilitate the volunteer work, and act as the local representative
- ensure that data is collected appropriately
- be a link between the local area and the national project

When does all this happen ?

Our timetable is based on doing on volunteer surveyors being out doing fieldwork in the August to October fruiting season of 2015.

Therefore, we aim to have agreements with local organisations and have identified Local Facilitators by the end of March 2015. This will allow organisational arrangements to be put in place, as well as any funding that is required.

We intend to provide training from June 2015.

The Local Facilitator's role will be flexible, part-time and overall run for approximately 6 months, June to November 2015. The peak of their activity will be August to October 2015.

6.9 Project template for field verification

Project Initiation Template

1 Project title

Collecting knowledge about our local orchards

template version: v1

2 Project themes (ref Gathering 2014)

education, local food, access, local varieties, knowledge, orchard culture

3 Tags

local knowledge, engagement, volunteers, orchard heritage, future projects, economic & social benefits

4 Project description

The project works at a community level to learn about the orchard resource locally. It engages with volunteers in a citizen science initiative to visit and record orchards and their contents. In this way it determines the local orchard resource so that new projects can emerge to address the needs and opportunities that are found locally. Throughout the process it raises awareness about local orchards and their cultural value.

5 Project outcome

We have visited our local orchards and learnt about them.

We have engaged with the keepers of orchards locally.

We now have a better understanding of the quality and quantity of orchard fruit in our area.

We have enquired about how much fruit is used, and how; and also of the surplus. "

6 Project aims & objectives

Aim; to learn about our local orchard resource so that we can better value it and benefit from it.

Objective; carry out a visit to each of the orchards in our area to assess the content, condition and use of its various elements. Record this and share it with project partners. "

7 Project activities

Determine Local Facilitator

Training for Local Facilitator by project partner. Then Local Facilitator carries out these tasks:

Recruit local volunteers to the project.

Train volunteers with resources from project partner.

Allocate sites to volunteers.

Supervise volunteer fieldwork.

Mapping of new sites.

Quality check of fieldwork.

Share fieldwork records with project partners."

8 Project progress indicators

Milestones as per timetable below.

Indicator: No. of volunteer recruited

Indicator: No. of sites allocated to volunteers for fieldwork

Indicator: No. of sites with completed survey form submitted."

9 Project lead

Probably your organisation if it has a written constitution, and a bank account.

10 Project partners

Your organisation, with the active support of Orchard Research & Enterprise CIC in collaboration with the partners of the National Orchard Inventory for Scotland project. A letter of support will be provided on request.

Project Initiation Template

11 Project benefits

Knowledge of local orchard resource
Awareness raised
'Ownership' of knowledge remains local held
Opportunities for targeted follow on projects
Improved capacity of local organisation/ group
Involvement of local people as volunteers
Engagement with orchard keepers about opportunities with excess fruit"

12 Project costs

"Costing the project has been proposed on the basis of a fee of £15 per orchard (total), which contributes to the remuneration of a local facilitator (£12.50) and volunteer expenses (£2.50).
The agreed number of orchards determines the total fee.
A match-funding application could mirror these fees but could also add an element of core cost recovery for administration, insurance etc. or add other project elements as part of a combined project."

13 Project finance

Funding from the National Orchard Inventory for Scotland project can be match-funded by others. See the funding resources on the Network page/subpages at www.OrchardRevival.org.uk

14 Project timetable

The project can be run in 2015 or in 2016. For 2015 the timetable is:
April/May 2015; apply for match funding. Determine Local Facilitator
June 2015; Training for Local Facilitator. Recruit local volunteers to the project.
August 2015; Train volunteers. Begin fieldwork.
October 2015; Conclude fieldwork."

15 Project stage

Implementation

16 Project risks

There is a risk of not recruiting a suitable Local Facilitator who is able to deliver the project locally.
There is a risk of insufficient number of local volunteers being recruited.
There is a risk of insufficient capacity with the group or local body to properly organise the implementation."

17 Project success criteria

High proportion of local orchards visited.
Large number of volunteers involved.
Majority of keepers willing to engage in further projects.
Sufficient local interest and volunteer enthusiasm for follow-on projects.

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