

# 'HEALTH CHECK' OF FOREST SITES

## INTRODUCTION

This 'health check' should be used as a tool to measure how the forests you manage compare with quality expectations. This tool is based on research, which identified the key factors that influence the quality of experience amongst different user groups and the relative importance of these factors. An index of quality indicators has been established and applied to a format, which hopefully will be useful for you. (For more information about the background of this 'health check', see appendix.)

The 'Health Check' includes:

- *Summary of the key factors* or indicators that determine quality and their relative importance;
- A *'self-assessment' checklist*, which allows you to compare the quality of the forest blocks you manage with expected standards;
- A *'Health Check' survey questionnaire* and briefing notes regarding its administration. This survey could be used by staff to sample levels of satisfaction with the various quality indicators.

In the 'Health Check' you will find the following sections:

1. A brief guide on how to use the 'Health Check';
2. Site categories;
3. A summary box to fill in after completing the 'Health Check';
4. 8 key self-assessment areas, including a summary and a box to fill in your evaluation;
5. Appendices including: more background information, a suggested definition of user groups, and a self completion questionnaire which may be used in addition to the 'health check'. Guidelines for how to distribute the questionnaire are also appended.

## HOW TO USE THE HEALTH CHECK

1. Check the category of your site (see overleaf)
2. Only use parts of the check list appropriate for your category
3. Go through the *'Tactics'* in the Self Assessment Section and score all of the items which apply to your site category.
4. Scores range from 1-5 as follows:
  - 1 = very poor
  - 2 = poor
  - 3 = adequate
  - 4 = good
  - 5 = very good
5. Take a tour round your site and fill in the *'Practics'* in the Self Assessment Section. Again, give a score of 1-5 to each applicable item on the list:
  - 1 = very poor
  - 2 = poor
  - 3 = adequate
  - 4 = good
  - 5 = very good
6. Identify all areas where improvements are needed (those you have given a score of 1-3).
7. Fill in their details including suggested actions and responsibility in the summary box below.
8. Calculate the total average score by adding up the totals for all of the self assessment areas and divide by the number of items checked ('Tactics' and 'Practics').
9. Areas with scores below this average may be considered as most likely to require action. The average score may also be useful to compare sites which have been checked or to compare the same sites over a period of time.

## SITE CATEGORIES

### 1. 'Buzzing'

- All basic and additional facilities plus a visitor centre, children's play area etc
- Variety of information, including exhibitions, leaflets, advice about responsible behaviour etc
- Relatively large numbers of visitors, especially holiday visitors and groups, possibly all year round

### 2. 'Regular'

- Basic facilities such as car park and toilets plus picnic areas, benches and similar
- Additional information in form of the interpretation boards, maps etc
- Medium numbers of visitors, with a broad mix of locals and peaks of holiday visitors during high season

### 3. 'Informal'

- Basic facilities such as car park etc
- Information in terms of signs with name of the site and waymarking signposts
- Smaller numbers of visitors, spread out over the year and a large proportion of local residents

#### SUMMARY OF COMPLETED 'Health check'

<b>Name of site:</b>					
<b>Site type:</b>		<b>1</b>	<b>2</b>	<b>3</b>	
<b>Checked by:</b>					
<b>Date:</b>					
Total score =		/ (divided by no. of items checked)		= (Total average score)	

#### IMPROVEMENT AREAS

Number	Suggested action	Responsible
<i>Example:</i> 2.4 Access to and view of water	Clear the viewpoint at Hillside and provide bench	R. Anger

<b>Next check:</b>	
<b>Signed:</b>	

# SELF ASSESSMENT AREAS

## 1. User groups

First of all, it is important to identify the different types of visitors who use your site. As you are aware, users of forest sites may be divided in various ways and which method to use is very much up to the team at your site. The themes presented below are suggestions of ways to divide visitors. If this type of knowledge about visitors is limited at your site, asking visitors a few questions within these themes can give you enough information for future categorisation.

- Age and family situation (e.g. older, younger, with children or not)
- Distance from site (e.g. people living locally, in the neighbouring region or further away)
- Knowledge about and interest in nature (e.g. membership of nature related organisations or not)
- Activities (e.g. degree of specialisation of their activity, mountainbiking or rambling)

An example of a user group categorisation can be found in the appendix.

For more information about user groups at your forest district, please contact the Statistics department.

1. USER GROUPS			
'TACTICS'	Site type	Score 1-5	Actions or comments
1.1 Clear identification of user groups	1-3		
1.2 Knowledge of the needs and requirements of user groups	1-3		
1.3 Awareness of any user groups to discourage/encourage	1-3		
1.4 Awareness of conflicts between user groups	1-3		
'PRACTICS'	Site type	Score 1-5	Actions or comments
1.5 Clear info etc to different groups where to go and what to do	1-3		
1.6 Events for different groups	2-3		
1.7 Facilities for different groups	2-3		
1.8 Access for different groups	1-3		
1.9 Places for groups of people as well as solitude	2-3		
Score = <input type="text"/> / (divided by number of items checked) <input type="text"/> = (Average score) <input type="text"/>			

## 2. Scenery, landscape and wildlife

Research at Forest Enterprise sites and within the field of outdoor recreation has shown that one of the most important areas of enjoyment and the main motive for forest visits is nature and wildlife. The scenery and views that can be expected together with the fresh air, peace and quiet and natural aromas all help to create the positive feelings of relaxation and happiness that the majority of visitors are looking for.

2. SCENERY, LANDSCAPE AND WILDLIFE			
'TACTICS'	Site type	Score 1-5	Actions or comments
2.1 Variety of plants	1-3		
2.2 Opportunity to see wildlife	1-3		
2.3 Different trails (e.g. for kids, 'senses')	2-3		
2.4 Access to and views of water	1-3		
'PRACTICS'	Site type	Score 1-5	Actions or comments
2.5 State of viewpoints	1-3		
2.6 Open spaces	1-3		
2.7 Contrasting types of nature/scenery	1-3		
Score =		/ (divided by number of items checked)	
		= (Average score)	

## 3. Facilities

This aspect of visitors' experience of forest sites includes built facilities and after nature and wildlife, often most important to visitors. Facilities can be divided into three categories:

- Basic (e.g. off-road car parks and signposts)
- Medium (e.g. picnic areas, toilets, bins, information)
- Prime (e.g. visitor centre, play area, shop, café, interpretation)

Different types of visitors will have varying expectations and needs for facilities. It is vital to aim for adequate facilities to a standard that meets the needs of the user groups at each site. (A checklist for signs, information and interpretation can be found separately under section 5.)

3. FACILITIES			
'TACTICS'	Site type	Score 1-5	Actions or comments
3.1 Facilities meet the need of user groups	1-3		
3.2 Involvement of local people/companies	2-3		
'PRACTICS'	Site type	Score 1-5	Actions or comments
3.3 State of existing car park	1-3		
3.4 Benches	1-3		
3.5 Picnic area	2-3		
3.6 Toilets	2-3		
3.7 Bins	1-3		
3.8 Visitor Centre (incl opening hours)	3		
3.9 Play area	3		
3.10 Shop	3		
3.11 Café	3		
Score =		/ (divided by number of items checked)	
		= (Average score)	

## 4. Public access

Another appealing feature of visiting forest sites is a perception of being welcomed at sites managed by FE. Therefore, it is important to make sure that visitors are aware of the ownership situation. Good access to the countryside is also an important aspect of visitor satisfaction and so it is vital to ensure accessibility to different parts of your site.

4. PUBLIC ACCESS			
'TACTICS'	Site type	Score 1-5	Actions or comments
4.1 Monitoring conflicting use of paths etc	1-3		
4.2 Awareness of 'Outdoor Access Code'/ Forest Code/ Country Code	1-3		
'PRACTICS'	Site type	Score 1-5	Actions or comments
4.3 Clear signs of ownership	1-3		
4.4 Overall condition of paths	1-3		
4.5 Overall condition of organised trails	2-3		
4.6 Partly sheltered paths	2-3		
4.7 Interesting paths (contrasts, variety)	1-3		
4.8 Width of paths	1-3		
4.9 Variety in length and difficulty	1-3		
4.10 Embedded in nature	1-3		
Score =		/ (divided by number of items checked)	
		= (Average score)	

## 5. Information

Information can be divided in to three different groups, similar to the facilities, where the first group is more basic and is seen by visitors as essential at all sites. The groups are:

- Waymarking (e.g. signposts, marking of routes with different colours, names etc)
- Interpretative information (e.g. interpretation boards, exhibitions, maps etc)
- Other information (e.g. advising and informing visitors about do's and don'ts)

5. INFORMATION			
'TACTICS'	Site type	Score 1-5	Actions or comments
5.1 Off-site promotion	2-3		
5.2 Collaboration with schools etc	2-3		
'PRACTICS'	Site type	Score 1-5	Actions or comments
5.3 Condition of paths/trails' signposts	1-3		
5.4 Length and/or time on signs	2-3		
5.5 Interesting info along the path	2-3		
5.6 Maps	2-3		
5.7 Interpretation boards	2-3		
5.8 Exhibitions	3		
5.9 Other leaflets/brochures	2-3		
5.10 Foreign language translations	3		
5.11 Info provided for disabled visitors	1-3		
5.12 Info about responsible behaviour etc	1-3		
Score =		/ (divided by number of items checked)	
		= (Average score)	

## 6. Staff and service

Although visitors often have a limited number of encounters with FE staff, this is one area mentioned as having lots of potential for adding greatly to visitors' enjoyment. Apart from staff at visitor centres, visitors will meet or see staff who are related to timber operations. This aspect of a forest visit is very much accepted and sometimes expected by visitors.

6. STAFF AND SERVICE			
'TACTICS'	Site type	Score 1-5	Actions or comments
6.1 Basic education in 'welcoming visitors' to <i>all</i> staff working on the site	2-3		
6.2 Continuous training among rangers regarding recreational aspects	2-3		
'PRACTICS'	Site type	Score 1-5	Action or comments
6.3 Clearly identifiable staff in terms of clothing	2-3		
Score =		/ (divided by number of items checked)	= (Average score)

## 7. Fees and prices

It is important to note that one of the appeals of forest visits for many people is good value for money, or sometimes that the visit does not cost anything. If fees are charged, it is important to clearly specify what the fee is for and if possible, give examples of how the income is being used.

7. FEES AND PRICES			
'TACTICS'	Site type	Score 1-5	Actions or comments
7.1 Clear policy known to all staff about fees and prices	2-3		
7.2 'Friends of' programme	2-3		
'PRACTICS'	Site type	Score 1-5	Actions or comments
7.3 Clear info about possible payment at car park	1-3		
7.4 Discount schemes for families, elderly, students, locals etc	2-3		
7.5 Level of prices compared to other outdoor recreation sites	1-3		
7.6 Information about what fees are used for	1-3		
Score =		/ (divided by number of items checked)	= (Average score)

## 8. Problem prevention

In this section, a number of areas of potential conflict are detailed. These have been shown to be causes of disturbance, which could decrease visitors' enjoyment of their forest visit if not addressed.

8. PROBLEM PREVENTION			
'TACTICS'	Site type	Score 1-5	Actions or comments
8.1 Existing and potential conflicts between user groups identified	1-3		
8.2 Actions taken towards solving conflict or plans made for longer term	1-3		
'PRACTICES'	Site type	Score 1-5	Actions or comments
8.3 Noise (motor based activities etc)	1-3		
8.4 Litter (education, bins, dog bins)	1-3		
8.5 Maintenance of tracks and paths	1-3		
8.6 Monitoring of vandalism (signs etc)	1-3		
8.7 Safety/security (clear info, emergency numbers, training staff, first aid posts etc)	1-3		
Score =		/ (divided by number of items checked)	
		= (Average score)	

# APPENDICES

## Background

This 'Health Check' has been created as part of a research project within the Forestry Commission's research programme called *Forests and society*. The general aim of this programme is to develop a greater understanding of the ways forestry can benefit society and how these benefits may be delivered. It is recognised that different groups in society may use forests and woodlands in different ways and a further understanding of this is vital for future management.

NFO Transport & Tourism was commissioned in August 2002 to conduct research to monitor the quality of visitors' experience of their forest visit. The work carried out within this area has investigated what constitutes quality of experience for visitors, addressing related concepts such as motivations, expectations and the needs of different groups.



## User groups

The following suggestion for a categorisation of user groups is based upon analysis of FE survey data and a review of other information about users of countryside recreation sites in the UK and overseas. Each of the groups may be divided into sub-groups and a few examples of this are presented here. These sub-groups can be combined with other characteristics of visitors such as age, sex, place of residence etc.

**Convenience users** – very regular/routine visitors, live locally, likely to be visiting to walk dog or other spontaneous visit, wide age spectrum, spend short duration in forest, visit at least once a week. Many *do not actively choose the forest* but use as it is only alternative.

- a) dog walkers
- b) people taking shorter walks

**Nature users** – enjoy wildlife and natural heritage aspects of forests, actively seek information/ interpretation, take days out and visit forests while on holiday, visit one or more forest sites once every two or three months. *Nature is the motivation for visit.*

- a) members of organisations or associations related to nature or environmental issues
- b) non-members of similar organisations

**Social users** – take days out to forests to relax with friends and family. Enjoy and picnics, play areas. Require information and interpretation. Visit at least once every couple of months especially during summer months. *Nature is a 'backdrop' to their visit.*

- a) 'out with friends', no children in household
- b) 'out with family', children in household

**Active users** – such as cyclists, mountaineers and longer distance walkers. Take days out to forests and visit while on holiday. Visit is an adventure, a test of personal limits. Visit at least once every couple of months. *Nature is a 'backdrop' to their visit.*

- a) mountainbikers
- b) hillwalkers

## Guidelines for visitor surveys at forest sites

- Hand out the self completion questionnaires in person, to people who are aged 16 or over. Try to hand out the questionnaire at entrances/exit points, visitor centres, car parks or other places where you are likely to encounter visitors with minimal negative effect on their enjoyment of the forest.
- Another way of distributing the questionnaire is to place them in clear plastic wallets (“poly pockets”), along with a free post envelope and a pencil. These can then be placed under windscreen wipers of cars parked at the site.
- Spread the times of handing out questionnaires over seasons, days of the week and throughout the day. This will allow you to obtain a representative picture of the visitors to the site.
- Only give one person per group of people a questionnaire, NOT to everyone in the group. Also, when handing out the questionnaire to one person in a group try to vary who you give it to – i.e. do not always give to oldest or the male/female.
- Depending on the resources you have got, ask users to complete the questionnaire on-site and **return it to the visitor centre** or a member of staff before leaving. Alternative methods include providing a box for completed questionnaires to be put into or hand out free post envelopes, in which the questionnaire may be returned.
- If possible, have some pens available for use so that as many users as possible will be able to complete a questionnaire.
- To encourage the visitors to fill in and return their questionnaire, a small incentive or a chance to win a prize, is often helpful. This could, for example be in form of a pen or a book or the chance to win a prize. When you hand out a questionnaire, make sure to let the visitor know what the incentive is. Also make sure that they know the reason for the survey and where to return the questionnaire after they have filled it in.
- If you want to follow up this exercise and find out more about what visitors think, please contact the Statistics department at [statistics@forestry.gov.uk](mailto:statistics@forestry.gov.uk)