

## Case study 4

# A steep learning curve... Ruperra Conservation Trust

Ruperra Conservation Trust was originally formed from a local history group with interest in saving a derelict local Jacobean mansion, Ruperra Castle. The Trust was then made up of a few local historians, both professional and amateur, and other supporters, both local and from further afield with an interest in historic gardens and buildings. Four original trustees formed the Trust as a registered charity and company limited by guarantee. They gathered onto their committee other like-minded people who could help them in saving an at-risk building, and began to fund-raise to purchase the castle and find new uses for it.

The Trust was still fundraising when a local property developer bought the Castle and grounds, leaving them with some big decisions on where to go next. Alongside the Castle was a 150 acre (62 hectares) woodland, Coed Craig Ruperra; part of the old estate which had been sold separately many years earlier. This woodland had been Ancient Semi-natural Woodland (ASNW) but was planted with conifers in the 1920s, following the Great War. Part of the site still contained a conifer crop, but the majority had been clear-felled during the 1990s, leaving the site bare and in poor condition. More

importantly (as far as many of the then trustees were concerned), it contained an Iron Age hill fort. The woodland had recently been put on the market.

The trustees decided to continue fundraising with the aim of buying the woodland and restoring the mediaeval Motte at the top. We succeeded in buying the woodland in 2000. The Trust's aims were to interpret various historic features, to replant the woodland with native broadleaved trees and to make the whole site more accessible to the general public. We have not only achieved these aims, but are now starting up a new Community Interest Company to generate income from the woodland and develop training opportunities. This case study looks at both the trials and tribulations the Trust has encountered during the restoration, and how it has moved on to a new stage.



Coed Craig Ruperra



## History and background

Ruperra Conservation Trust was formed in 1996 from a local history group. Originating in Rudry, a small village near Caerphilly, the group had the intention of rescuing the derelict Ruperra Castle nearby and restoring it for public enjoyment. Because of this, the Trust that was formed after advice from some helpful local advisors was constituted originally as a Building Preservation Trust, but was also a Registered Charity and Company Limited by Guarantee.

**Ruperra Castle**



Grants were found for feasibility studies into potential uses for the castle and grounds, and huge effort was invested into this project. Local and national fundraising campaigns were instigated – everything from grant applications to car boot sales and coffee mornings were undertaken by supporters from the local area. Then came the news that the castle had been sold.

The loss of the castle to a property developer might have meant the dissolution of this charity before it had even really begun its work. However, a few dedicated and fully committed trustees continued to fundraise and campaign, particularly in view of the fear that the castle might be the subject of a plan to build housing within the grounds. This would have potentially destroyed the 'romantic ruin' which it then was, but would also have meant the loss of an amazingly tranquil and atmospheric piece of countryside. One trustee in particular was determined not to give up, and it was her persistence which kept the group going forward.

### **The woodland**

Above the castle was Coed Craig Ruperra, a remnant of the estate which, coincidentally, was on the market. A 62-hectare Planted Ancient Woodland Site, it had recently had the majority of its mature conifer crop clear-felled and was in a particularly poor state, with damaged paths and large amounts of conifer brash left strewn over felled areas. Nevertheless, from its

summit were occasional glimpses of glorious views of the surrounding countryside. It lies at the centre of a triangle between Newport, Cardiff and Caerphilly and overlooks the coastal marshlands between Cardiff Bay and Newport, with views across the Severn Estuary to the West Country. As a conifer forest these views, once enjoyed by the Lords Tredegar (owners of the castle), had long been lost in tree cover. Even with the conifers gone, many views were obscured; Cherry Laurel, planted as fashionable hedging during the castle's occupation, had spread out of control, forming dense, dark thickets in many areas.

**The Motte 2007**



At this point, the Trust was still a Building Preservation Trust with its feet firmly in historical interest. The woodland held not only the Iron Age hill fort, which surmounted the ridge, but also the remains of an estate summerhouse surmounting the mediaeval motte bank at the very summit, and a smaller derelict summerhouse lower down. These were all ripe for restoration, conservation and interpretation. The trustees could see great potential in this site for educational visits; the links with the castle and local history as well as nature conservation would attract grants on several levels. Plans for new paths and features, interpretation panels and so on were drawn up, and fundraising efforts took a different slant as applications were made to bodies like the Countryside Council for Wales and the local council.

### **Acquisition and initial funding**

The drive towards increased biodiversity came at just the right time for us: several larger purchase grants were acquired because of ecological reports which highlighted the importance of the woodland as a conservation area. Dormouse-opened hazelnuts had been found by a local ecologist working nearby; wild native daffodils and several ancient woodland indicator species had been recorded by the County Ecologist. With help from larger grants and small and large donations, the Trust was able to raise £64,000 to buy the woodland in 2000.

Fundraising efforts continued, and an application was made to the Heritage Lottery Fund for a grant to begin replanting the native species, restore part of the Motte and improve paths for public access. This grant came through in 2000, and was for £180,000. Match-funding came from many sources, small and large; Forestry Commission woodland grants, Esmee Fairbairn Foundation, Environment Wales and many others. Importantly, the Lottery Fund application included volunteer time and expenses, which it was possible to draw down in cash even though the match-funding was a time element; this device is often available to applicants to free up some cash so long as you keep records of volunteer numbers and time spent, and is often under-used by novice groups.

### **Managers and projects**

Realising what a huge project they had undertaken, the trustees wisely included in their application funding for a contract Project Manager to work with them for two days per month for the first two years. It was perhaps at this point that things could have gone really askew; the job could have gone to someone inexperienced in skillfully managing projects and people. However, the trustees selected the right man for the job, and were guided into the first stage of their new life as owners of a recovering woodland by Alan Underwood.

### **Volunteers building steps**



Alan's job initially consisted of getting the projects underway while looking for further funding opportunities. Alan's clear-thinking and focus on the

task the trustees had set themselves was perhaps the starting-point of the change in direction which, with hindsight, we had to take. Some of the trustees, while fully supporting the woodland project, were happy to let others (always the same few people!) take the lead while they pursued schemes to save the castle and to highlight its parlous state.

Alan and the more focussed trustees set up a woodland management team which began involving the 'Friends' group (the local supporters) in work tasks on the woodland; such as growing their own native trees and planting them in a volunteers' area, helping to clear the Motte of vegetation, clearing bramble scrub from paths and so on. This team formed the basis of the volunteer group which still meets twice a month for work days and has become a social 'club' which welcomes new members with open arms (and loppers, slashers, bowsaws and gloves!).

The woodland management team then consisted of the actively involved trustees, the Project Manager and an ex-officio member (a Chief Ranger from the local Caerphilly Council's Countryside Service). Together, this team planned the work to be done each season, the methods, funding and contractors. Alan's contract also included the task of seeking funding for (initially) a full-time Woodland Manager, a part-time Education Officer and an Admin. Assistant.

At this stage, it could be said that the Trust had ambitions above its capacity! All we had was a cleared area which had little interest for visiting schools or community groups. However, applications were made to the Aggregates Levy, Coalfields Regeneration Trust and other large funding bodies for these posts and the associated costs. The fact that the bids were unsuccessful is perhaps indicative that the funders could see how immature the project was at this stage; they could see that three members of staff, particularly an education post, would be overkill.

Undeterred, Alan and the team applied for funding just for a part-time Woodland Manager post from Environment Wales and WCVA, and this time it was successful. Interviews were held, and in October 2002 our first employee took up his new post. Again, we were incredibly lucky in securing the right person at the right time. Eric Hawkeswood had been a Reserves Manager with Gwent Wildlife Trust. An ecologist and, even more importantly, an experienced land manager, he took up the new job with enthusiasm and began to undertake wildlife surveys while leading the grant projects, letting out contracts for work and seeking further grant funding.

Alan Underwood's time with the Trust was now at an end; we were two years into our Lottery grant and becoming more experienced land-owners. The Trust's

work was well-publicised and already highly regarded within the local Council and voluntary community for its determination to win support and funding for the huge task which still remained. Some of Alan's last tasks were to help organise the official opening of the woodland (June 2002) and an Open Weekend in July 2002, to introduce first the funders and local dignitaries, then the general public, to the work that had already been done.

### **Work, volunteers and funding**

Under Eric's guidance, the Trust moved forward apace. Contractors had already planted nearly 20,000 new native trees on the woodland, including a small area of hazel coppice (about 4000 plants) which were intended to produce (eventually) material for green woodworking displays, part of the Trust's educational plans.

**Coppice planting 2001**



New pathways, particularly a permissive horse route, had been opened up with Lottery funding and labour, both paid and donated, from the local Countryside Service team and Probation Service. The clearance of the Iron Age hill fort and the restoration of the Motte were major tasks on which contractors and volunteers alike spent untold hours. Volunteers (particularly the trustees) continued to help with administrative work and fundraising; Eric successfully applied for a £170,000 grant from Cydcoed for improving public access and interpretation of the site. The volunteer group continued to work on the many tasks on site, particularly scrub clearance, while those who were

less physically active helped by publicising the woodland at local agricultural shows, delivering leaflets, writing newsletters and giving talks.

From that point on, the Trust progressed through its first few years fairly smoothly. Everyone was working towards the main goal of restoring the woodland and improving public knowledge and access. Those who were more interested in the historical side had the restoration of the Motte wall and the clearance of the Hill fort to keep them occupied, while others got stuck into the planting, scrub-bashing and maintenance side. Everyone got together to help with annual open weekends, and the Friends support group organised social events like an annual barbecue to have a chance to meet without having to work.

**Open weekend at the woodland 2006**



### **Tensions...and solutions**

Towards the end of 2005, Eric left us to set up his own business, and we took on another environmentalist, Alex Coxhead, who guided us through the last couple of years of the two big grant funds. By now, there were a few tensions within the Trust board, as the Castle issue had taken a back seat and was felt by some to be in need of extra publicity.

The building still belonged to the property developer, and he was trying again to get planning permission to build within the grounds. Some of those original trustees who had wanted to buy it were keen to highlight its plight nationally and locally again, fearing that a lack of action would lead to planning permission being granted. They hoped that Trust funds might be made available for helping with feasibility studies, but with a 150-acre property in need of ongoing management, other trustees were very clear where our legal responsibility must lie: we owned a woodland, not a castle. We were perhaps in what you'd call a teenage phase; one of the trustees read somewhere that this is quite common after the initial setting-up. Where initially, everyone is pulling together to achieve one goal (birth and early

childhood), you then get the troubled teenage years, finally getting to maturity if you're lucky!

In our case, after a fair bit of time spent arguing out the issues, and after consulting the local Association of Voluntary Organisations, it was agreed that the best way forward was for the castle to have a separate campaigning trust which would be independent from the woodland. Ruperra Castle Preservation Trust was born, and remains a force to be reckoned with on castle issues, although it has not yet managed to buy it.

### **Changes in management**

Back at the woodland, we (with Alex) completed the grant work for both Lottery Fund and Cydcoed grants. Some of this money was easy to spend, some much harder (of which more later). At the end of this period, we also came to the end of the funding for Alex's post, and after some serious consideration, the trustees decided not to seek further grants for the manager's position, preferring to take a break both from employing someone and from grant applications. Alex left us in early 2008, and with some capital behind us from over-subscribed match-funding, we had time to think about where to go next.

We spent two months just doing the usual volunteer work days, then we hit the summer and our bracken scrub started to grow...two of us agreed to take on a contract to clear it from around our planted trees (an annual task). While doing this, we were able to have many long chats about what should be happening in the Trust and the woodland from this point on. In the meantime, we successfully applied for a Landfill Communities Trust (Biffaward) grant for further biodiversity work which included Laurel and Rhododendron clearance and habitat management for dormice.

The other trustees were happy for us to undertake the work of managing this grant, including doing some of the contracts, so we set to dealing with the invasive species (we're still at it and will probably be so for another ten years, but we're getting there!). Working on the woodland ourselves on a contractual basis has allowed us to gain far more knowledge of the best methods of dealing with certain matters, as well as giving us greater insight into the actual land. I would encourage anyone to try this for a full week instead of just a volunteer morning - it's an eye-opener.

### **Income potential**

The work undertaken on the grant contracts had included thinning, coppicing and planting. As we continued with this, we realised that the amount of timber we were extracting was a saleable commodity if logged-up, as were some of the hazel rods and offcuts. We began to see a potential new source of

income for the Trust which would hopefully reduce the reliance on grant funding. We went on a Small Woods course on sustainable woodland management, including coppicing, and realised that they were getting the paying public to do some of their work – an excellent idea! We could do the same, running training courses in various woodland craft skills – there are 150 acres to practice on!

The stage the Trust is now at is a little further on; we have continued with the contract work, using both Biffaward and Trust funds to really push forward with invasive species control, and it's making a huge difference to the woodland's appearance. Tree planting and habitat work over two winters has accompanied this, and our visiting public are fascinated to see the very large amount of work that's going on and also to be able to talk to us about it. We are constantly chatting to walkers and riders about the site and our aims, and the support and appreciation we and the volunteers receive is a massive boost to our efforts.

### **New enterprise**

We also have a new community enterprise in its early stages. To handle the income generated from the site we have established a Community Interest Company – a legal entity whose profits must be tied to a specified charitable or community body. Ruperra Countryside Services operates as our trading partner, feeding profits back into Ruperra Conservation Trust.



We are using the produce from our labours to create coppice products (beansticks, peasticks, hurdle rods, plant supports, hedge stakes) and firewood, all sold locally. We have taken on outside contract work (hedge creation, nature reserve maintenance) using the knowledge we've gained from working on Ruperra. We also aim to start running training courses in woodland skills (hedgelaying, tree management, path building, coppicing), eventually offering the woodland as a training centre for chainsaw and

brushcutter qualifications. The trustees are fully supportive of this new enterprise, with its aim of using the woodland in a traditional way (coppicing, timber production) while maintaining public access, historic interest and biodiversity (the latter always being the most important element).

## Reflections: looking back and forward...

As you can see from this run-through of our early years, we've had our fair share of good and not-so-good times. Personalities play a big part in any committee, and we have had a good few arguments, some of them minor, some less so. One classic comment from a trustee who'd fallen out with another was perhaps the most sensible I have come across: in the process of standing down after yet another personality clash, she said 'I'm willing to resign so (he) can stay on as a trustee; he is more useful to the Trust than me, and although we cannot work together it's the woodland that we're all working for so I will stand aside'. If only all committee members could see things that clearly!

Some of our major differences were (unsurprisingly) over funding and how to spend our hard-earned cash. As a trustee, and the Treasurer for several years, I feel able to pass on a few recommendations to upcoming groups full of enthusiasm but lacking in experience:

- Never, ever be tempted to apply for a grant before you have a project to go with it; grant-led funding always trips you up. We had Cydcoed projects which, because of the money available, had been dreamed-up by some trustees from an idealised wish-list and were never practical. Eventually those funds had to be reorganised and we came under pressure to spend them. Project-led funds would have been spent far more carefully on plans we'd really thought through.
- You need someone who will take on the grant applications and the returns (the 'draw-downs') to funders; this doesn't have to be an accountant but it must be someone organised and able to deal with fiddly figures. Most funders have different requirements, and some returns forms are easier than others. Make use of their helplines to ensure you do it right!
- Before you apply for a grant, look at how much you are asking for, and consider how complicated the application process is. Sometimes the effort is not worth the return; unfortunately this is often the case with

Countryside Council for Wales forms, for example. A complicated application procedure may result in just a few hundred pounds income, which could have been gained more easily from another grantor.

- Get to know your local Association of Voluntary Organisations; they may well know when there's a funding underspend somewhere that you could tap into easily.
- The set-up of your group will determine your individual and collective legal responsibilities, but remember that personalities shouldn't dominate. No single person's view is the only one that matters. If it doesn't feel right, don't keep quiet about it.

## Volunteers and local community—get people involved!

Throughout the life of the Trust and its ownership of the woodland, there have always been one or two people willing to put in more time than the rest could manage, in order to get things done. I mentioned the person who was instrumental in the early set-up and purchase; she is still involved but on a lesser level, having happily passed on the greater commitment needed to a few younger and more woodland-oriented trustees who finally turned up over the years.

We've had several changes of trustees, eventually reaching an appropriate balance between those whose interest is in the woodland and its biodiversity and management, and those for whom its historic past as part of the Tredegar estates is the defining factor. Between us all, we have a mix of interests which maintains a fair balance. As our departing trustee said, it's the woodland that is important, not the personalities.

### Volunteer led walks include the every-popular Fungi Foray



The local community has provided us with both the trustees themselves and the support group which was originally set up to help purchase the castle. The Trust is based in a rural area alongside urban fringes. Draethen, Rudry and Michaelston-y-Fedw are the three closest small villages, while Machen is the larger community that has provided many of our members. Because of the close association with the castle, many people's original involvement came via a desire to save not only the building but also the personal memories of its people, owners and workers alike. Many of those who have contributed with a membership fee every year had family who served the Lords Tredegar and lived in the estate cottages, using the woodland to get to work each day. Some were soldiers stationed there during the war when the building was requisitioned.

These supporters were an invaluable source of information when recreating the woodland's past history; memories serve to explain why some things are there or were missing. Local people remember walking through the woods to the Motte or the Castle, picking wild flowers on the way when the estate keepers would chase children off if caught. Others remember clearly where old Badger setts or Great Crested Newt ponds were, helping us to fit today's remnant wildlife into the estate's natural history.

The memories also serve to enforce a sense of caring for the woodland and the estate among the local community. People want to know what's happening now with a place they've known all their lives; we are happy to tell them our plans and if possible get them to help. It's better to engage the local community wherever possible; if they don't agree with what you want to do, sometimes it's because they don't understand *why* you need to do it. We have a good volunteer working group who do practical tasks twice a month, but they are also a secret weapon – they talk to visitors about what we're doing and why. It is our personal engagement with the new visitor that keeps him coming back. Our volunteers chat to walkers, explaining our work and encouraging them to join us (it sometimes works!). If you become responsible for a local woodland, we would recommend:

- Get people involved as volunteers in whatever capacity they suit best (active physical work, admin, publicity, newsletter article-writing, helping deliver leaflets, sitting at stalls and chatting to people about your project).
- Talk to the local community about your aims and intentions, encourage them to tell you what they'd like to see, what they think you're doing right or wrong.

- Try to engage all users, however difficult they may first appear to be. We had one lady who always appeared to be criticising whatever we did. Eventually, we suggested she take on a small area of the woodland nearest her house which needed bramble clearance and which we didn't have time to see to regularly. This began a more constructive relationship; she now has a sense of ownership and a feeling that she has a hand in some of the management. She has become a really good neighbour and tells us about any untoward happenings on the site (and she's stopped grumbling!).
- Get local schools involved if possible, as they will contain your future volunteers and users of the woodland. If the kids feel that it contains some of their work (planting trees, pond dipping, art projects etc), they may be less inclined to cause problems on it.
- Get volunteers to help with guided walks and informative talks about your work: local community groups are often looking for speakers and may want to follow up a talk with a visit to your woods.

And finally, remember to enjoy your woodland – it'll be hard work but seeing the changes as it progresses is both fascinating and rewarding.

**This Case study has been prepared for Llais y Goedwig by Sue Price with the support of the Trustees of Ruperra Conservation Trust**

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