

A photograph of a woodland landscape. In the foreground, there are tall, thin trees and some bare, brown bushes. The ground is covered with green grass and some fallen branches. In the background, there is a dense forest of trees, and a small town or village is visible on a hillside under a clear blue sky. The text is overlaid on the right side of the image.

Lionthorn Community Woodland Association Falkirk, Scotland

A 20 ha woodland, part of a large estate, that is managed in partnership with an urban community

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This case study is one of a set written as part of a Forest Research project. Some case studies are written by the community group, others by researchers who visited and interviewed group members, but they have all been validated and endorsed by the community groups.

Forest Research developed a standard method for describing the case studies, outlined in Lawrence and Ambrose-Oji, 2013 "A framework for sharing experiences of community woodland groups" Forestry Commission Research Note 15 (available from www.forestry.gov.uk/publications).

The case study comprises three parts:

1. The **Group Profile** provides essential information about the form and function of the community woodland group. Profiles were prepared following the methodology
2. The **Change Narrative** which documents key moments in the evolution of the community woodland group with a particular focus on the evolution of engagement and empowerment
3. The **Engagement and Impacts Timeline** documents milestones in the development of the community woodland group, its woodland and any assumed or evidenced impacts.

The case studies collectively provide a resource which documents the diversity and evolution of community woodland groups across Scotland, Wales and England. The method ensures that the case studies are consistent and can be compared with each other. We welcome further case studies to add to this growing resource.

For further information, and for the detailed case study method, please contact:

Bianca Ambrose-Oji (Bianca.Ambrose-Oji@forestry.gsi.gov.uk)

For further information about this case study, please see contact details at www.lionthorn.co.uk

1. Group profile

Woodland: Lionthorn Woods
Map ref: NS 876 780
Webpage: <http://www.lionthorn.co.uk/>
Date of profile: March 2014
Resources: Interview and site visit, group website

1. Institutional context (in March 2014)	
1.1 Ownership of the woodland(s)	<p>Lionthorn Woods is made up of three woodland blocks, Fox Covert Wood and Kilbean Wood and Easter Strip. All of the woodland blocks are part of the same woodland owned by the Callendar Estate, owners of an extensive area of woodland through the area.</p> <p>Classification of tenure: Informal agreement (private)</p>
1.2 Access and use rights to the woodland(s)	<p>Responsible public access (by foot, bicycle, horse or canoe) is guaranteed by the Land Reform Act. Access is encouraged and provided by an extensive path network and purpose built mountain bike tracks.</p>
1.3 Regulations/ responsibilities affecting the woodland(s)	<p>The minimum legal requirements for H&S, historic monuments and pest and diseases management as outlined in the UK Forestry Standard.</p> <p>Lionthorn Woodland Association has no formal access or management agreement with the Callendar Estate so there are no obligations placed on the group.</p>

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2. Internal organisation of the group/enterprise	
2.1 Group members, representation and decision making	<p>There are currently approximately 150 members. There has been no official analysis or profiling of members but it is assumed that membership is predominantly made up from the nearby Lionthorn housing district. There are no geographical restrictions on joining the group and there is no charge.</p> <p>The group represents people who live near to the woodland in the adjacent area of housing in the Lionthorn district of Falkirk. The group does not restrict membership by any other area of Falkirk. The group feels it represents members of the community who have an interest in using the woodlands that surround the Lionthorn housing district. There is recognition that it only represents the views of those who volunteer to take part and this approach means there are inherently sectors of the Lionthorn area and communities further afield that are not involved. However, these limitations reflect the limited resources of the voluntarily run association.</p> <p>Decisions are made by a committee that consist of 8 members, who meet every 2 months at one of the member's homes. Occasionally representatives from the Callendar Estate or other stakeholder attend these meetings to make representations. Decisions are taken on how best to respond to the Callendar Estate's management of the woodland. AGMs are held in spring and members are encouraged to take part in committee elections. There is a recognition amongst the group that the same committee members are often re-elected which may compromise the representativeness and the sustainability of the group because there is an over reliance on a few keen members.</p>
2.2 Communication and learning processes	<p>The group maintains a webpage with a news section and members of the group are encouraged to join a group email list. There is also a Facebook page which is regularly updated by members of the committee. The group also distributes flyers (hard-copy) around the local Lionthorn Housing area prior to the large annual event which in recent years has been a bioblitz. This is a separate event to the AGM which usually takes place at a different time of year.</p> <p>Communication via these channels is mainly one-way and feedback is informal.</p>

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<p>2.3 Structure and legal status</p>	<p>LCWA is constituted as an unincorporated association. The objectives which are set out in the group's constitution are:</p> <ul style="list-style-type: none"> a) To conserve and enhance the natural environment of Lionthorn Woods and its environments. b) To raise levels of community awareness of the amenity value of the Lionthorn Woods. c) To encourage the involvement of local people in conserving and enhancing the natural environment of Lionthorn Woods. d) To perform such actions and raise such funds as are deemed necessary to pursue these objectives. e) To pursue these objectives in partnership with Falkirk Council and other relevant agencies and stakeholders. f) To encourage and promote the educational value and usage of the Lionthorn Woods to schools and the greater community of Falkirk <p>There is a Treasurer who manages the accounts. The balance of the accounts hovers at around £200. The group has applied for grants either on its own behalf or in association with Callendar Estate, mainly to improve the access to the woodland (e.g. new paths, repair of existing paths). This has usually been done with the Callendar Estate acting as agents for the community group, who as land owner has to be involved in any event.</p> <p>Classification of legal form: Unincorporated Association</p>
<p>2.4 Regulations/ responsibilities affecting the group/ enterprise</p>	<p>There are no reporting obligations associated with being an unincorporated association. This model was chosen because it has limited obligations in relation to annual reporting etc.</p>
<p>2.5 Forest management objectives and planning procedures</p>	<p>The woodland comes under management of the Callendar Estate who manages it for amenity and timber production purposes. It is assumed that there is less of a drive for timber production in the areas that LCWA is associated with but the focus of management appears to have evolved in recent years. Lionthorn Community Woodland Association's role is around the facilitation of consultation between the local community in Lionthorn and Falkirk and the Callendar Estate, in a way that enables access structures to be improved, and community understanding of woodland to be increased.</p>

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	<p>The Lionthorn Woods management plan has been prepared by the Callendar Estate. The group is consulted on draft updates of the plan. It is assumed that it is accredited by FCS and maybe UKWAS but LCWA is not certain on this.</p> <p>The group uses an informal system of balloting members that enables them to choose what their focus of activity will be on an annual basis. The committee put forward options which are discussed at the AGM.</p> <p>Overall aim of plan: Public access and recreation</p>
2.6 Implementing the woodland management plan	<p>Management of the Estate woodlands is carried out by Callendar Estate. The Estate's woodlands are substantial and managed for commercial timber production, although there is some integration of amenity and recreational access. The area of woodland that the group is involved with is close to a heavily populated urban area, and therefore its value as amenity woodland is given careful consideration by the Estate.</p>
2.7 Business/ operating model and sustainability	<p>LCWA has applied for grants for new footpaths and maintenance of existing footpaths. This is done in association with the Estate as land owners and the factor frequently acts as agent. For some of the bigger projects this has allowed a mix of funding sources to be pooled. Any funding is project-specific and does not make any difference to the overall revenue position which is modest. The group also generates a small income from selling refreshments at events.</p>
2.8 Benefit distribution rules	<p>There are no financial or other benefits to distribute. The group works to enhance the public benefits that accrue from increased access to the woodlands brought about by their activities.</p>
3. External linkages	
3.1 Partnerships and agreements	<p>There are no formal partnerships with other stakeholders.</p>
3.2 Associations	<p>The group is an affiliate member of the Community Woodland Association. The Chair of the LCWA committee sits on the board of a not-for-profit company called Bespoke, which was set up by the Callendar Estate and has a similar remit to LCWA but was primarily set up to raise funds to keep the footpath network which is much larger</p>

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than the woodlands LCWA is involved with in good repair. Bespoke's general manager (a voluntary position) is the factor of the Callender Estate and he also used to be the Chair of the Falkirk Access Group. The group also has good relationships with the local authority and organisations such as the Falkirk Wildlife Festival, the Falkirk Access group and the Falkirk Biodiversity Group.

4. Resources

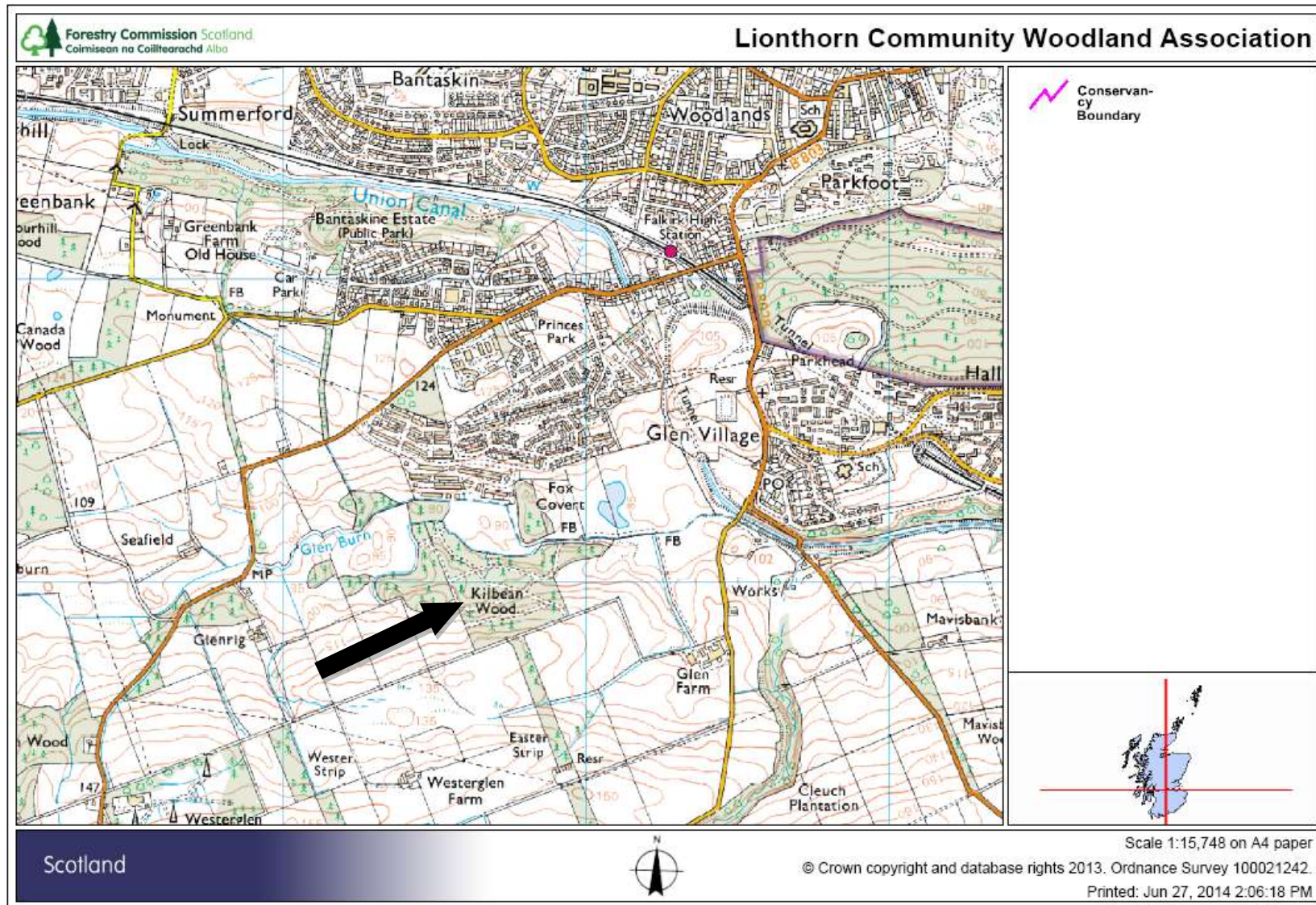
4.1 Forest/woodland

- Lionthorn Woods measures approximately 20 ha (although there is no fixed boundary around the area that they manage) and is situated on the southern edge of Falkirk in the area around Lionthorn Housing Estate.
- The woodland can be easily accessed from the Housing Estate. Visitor parking is available near the woodland.
- The soil type is a combination of noncalcareous gleys and brown earths with gleying.
- Fox Covert Wood comprises long-established Scots Pine. Kilbean Wood is a mature commercial plantation of Sitka and Norway spruce. It also includes areas of recently planted oak and rowan. Lionthorn Woods also includes an agricultural field that has been planted with native broadleaf species.
- Features of interest include two small man-made ponds and the Glen Burn which runs through the site.
- **Classification of woodland type: Mixed mainly conifer**
- Although planted for commercial forestry purposes, Kilbean Wood is now managed on a "continuous-cover forestry" basis. In addition, it is aimed at the creation of a mixed woodland to attract wildlife by replacing felled areas with native, broadleaf species. LCWA has also seeded a variety wildflower species as commercial forestry and agricultural use of Lionthorn Woods have diminished the variety of plant species.
- Wildlife of interest includes the badger, roe deer, fox, otter, water voles, pippistrelle bat, kestrel,

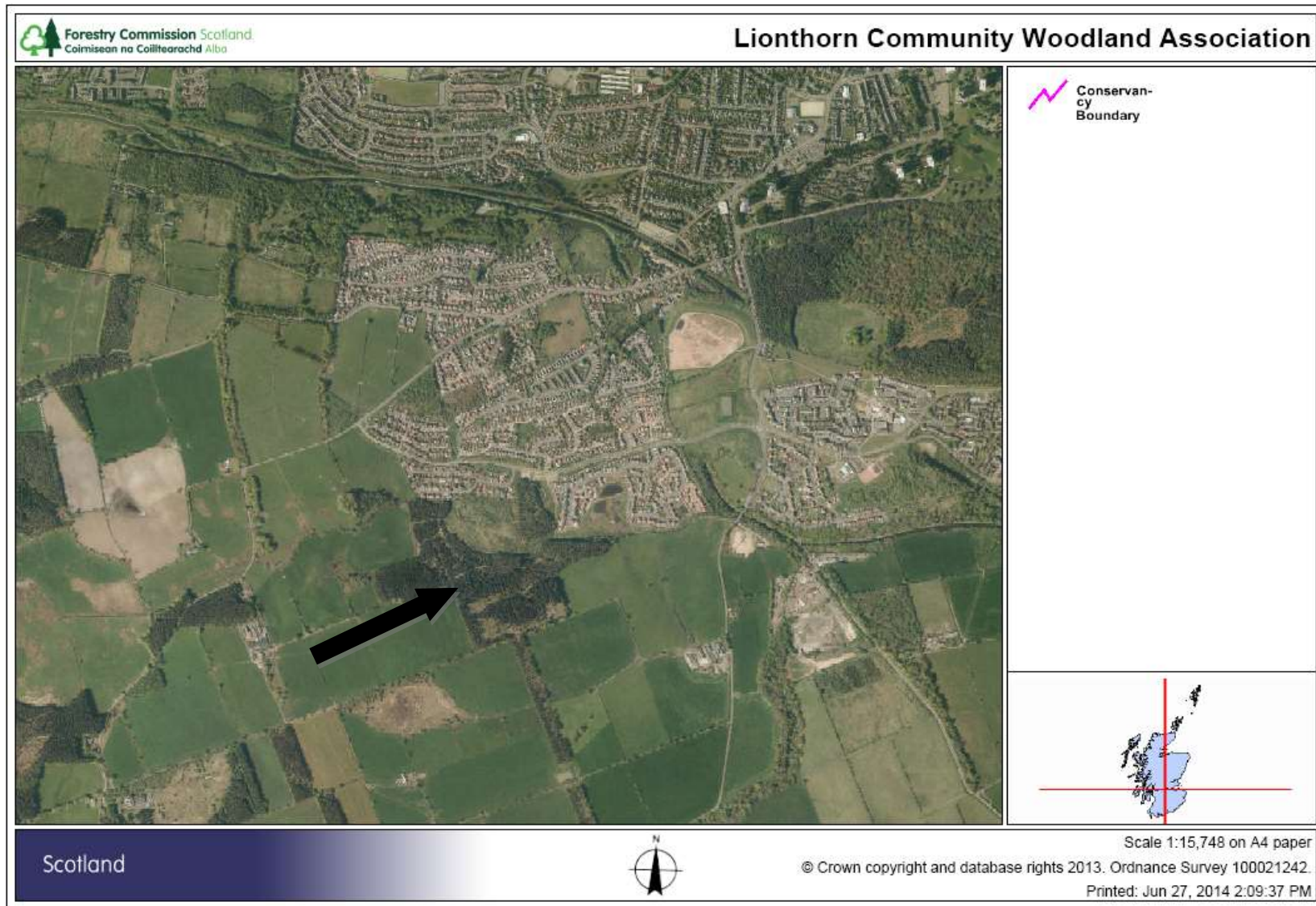
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	sparrowhawk, grey heron, grasshopper warbler and kingfisher.
4.2 Woodland and group funding sources	All silvicultural and access provision and maintenance is carried out directly by Callendar Estate or Bespoke, a not-for-profit company set up by Callendar Estate. LCWA has had some success in obtaining grant funding, mainly to run community engagement events. For example, the group received funds from SNH and Falkirk Environment Trust to hold a BioBlitz as part of the opening celebrations for the John Muir Way.
4.3 Knowledge, skills, human and social capital	As the group does not carry out silvicultural or capital management of the site, silvicultural expertise has only been of relevance when providing consultation to Callendar Estate on a major decision about clear-felling a large area which had been damaged by wind. In this instance, expertise was available in house or via contacts within the committee such as work colleagues or ex-work colleagues in the local authority.

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2. Change Narrative

1. Group History, Moments of change, motivations and engagement

The group was initiated by the Callendar Estate in response to the expansion of Lionthorn Housing Estate in Falkirk. This was done in response to a concern that the expanding population of the housing estate would result in large-scale use of the woodland that lacked any formal infrastructure. The Estate envisaged that group involvement could improve access to the woodland.

The estate factor initiated a community gathering/activity by inviting people from the new housing area to attend a guided walk around the woodlands. The turnout for the initial walk was good with an estimated 70 people attending, which indicated a high level of community interest in woodland (co-)management. A public meeting was subsequently held in which people were invited to form a group.

In 2002, the group was formally constituted as an unincorporated association (**informal enjoyment to group formation**). This model was chosen out of the recognition that any gains from woodland-related turnover would be insufficient to outweigh the costs associated with increased regulations if becoming constituted as a charity or limited liability company. The group also believed that this model would minimize the group's liability to woodland users.

The group does not manage the woodlands directly but takes a consultative role on major decisions in the area around Lionthorn Woods (**group formation to consultation**). LCWA has perceived a change in emphasis of management from a focus on access and amenity to timber / biomass production in recent years as a result of seeing increased felling activity.

Engagement with the local community has remained relatively stable throughout the group's history. This is due to a lack of resources and a limited desire to expand upon their original remit. Communication has evolved with developments in social media and the group now maintain a Facebook page and website in addition to posters and signage on site.

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2. Challenges, barriers and opportunities for change: Key issues in evolution

Facilitating factors

- There is a strong level of trust amongst the group and the land-owner (Callendar Estate). This has resulted in a good level of partnership working between the group and the factor.
- The not-for-profit company Bespoke, established by the Callendar Estate, shares a number of board members with LCWA. This has meant some duplication of purpose and may have affected the group's evolution.

Barriers and Challenges

- LCWA is faced with **limited turnover of committee members**. Related to this, attendance at AGM meetings is low, albeit stable, and LCWA engages with only a limited number of people. Lack of turnover could negatively affect group sustainability. A straightforward explanation for low community involvement is lacking. It might be the result of failing to satisfy the needs of the community but it could also be interpreted as a signal that the community is satisfied with group activities.
- There has been consideration of changing to become a social enterprise and hosting a different range of activities such as Forest School. However, **high financial costs (and limited access to grant funding) and limited volunteer resources** have prohibited this change from happening.
- The group has some **difficulty in striking a balance between too little and too much management**, which follows from recent comments indicating that some members of the community feel that the woodlands are being over-managed.

3. Evolution of income streams

LCWA has been nearly fully reliant on grant funding since starting its activities and applies to grants on a project-to-project basis. The level of income remains limited. The group was unable to provide exact figures on evolution of income streams over time.

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The group was unable to share detailed information about their funding.

4. Woodland history and change: Benefits and impacts before group involvement

The area of woodland now under influence/management by the community association was previously managed for timber on a scale akin to that elsewhere on the Callendar Estate. It was the expansion of the new housing in Lionthorn and subsequent establishment of the group that influenced the Callendar Estate to take a different focus on the wood's management.

As the housing expanded, the focus of management has changed to include a greater consideration of the expanding population of the area and area of housing which was now right next to the woodland. There is a sense that the group feel that they were formed partly for the estate to make the most of the funding available to facilitate greater access because there was a realisation all-round that the new housing would bring an increased level of access to the woods, so it was better that this was managed formally.

Time Period	Owner/Manager	Objectives / Benefits (and evidence)	Major operations	Access and use rights
- 2002	Callendar Estate	Productive woodland	Tree planting, tree felling	Access was legally permitted but informal paths made it very difficult

5. Woodland history and change: Benefits and impacts since group involvement

At the groups inception the focus of management by the Callendar Estate appeared to be access and amenity. The group facilitated this by helping the Callendar Estate to apply for funds which it would have otherwise been unable to access. For some projects LCWA applied for funding to complement part of a wider project and for others, the group provided support to the Estate's funding application. It is unclear whether the early focus on amenity and access was in response to the expansion of

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housing up to the woodland edge or to take advantage of the grants that were available at the time, or both. The group's involvement has helped the Estate to fund the delivery of access which has ultimately improved the provision for the community. This has helped both the community to access the woodlands and the Estate to deliver its objectives.

Recently, the focus of management has shifted somewhat to timber production. This may be connected to Callendar Estate having committed to providing biomass under the terms of a new contract. The group have not responded to this change in management emphasis. This is mainly because they understand the need for the woodlands to be productive.

The main woodland based activities carried out by the group are annual events which have centred upon wildlife surveying and responsible use of the woodland. Other activities include guided walks, litter picks and path maintenance.

LCWA also consults with Callendar Estate about major woodland operations. This has not only resulted in improved infrastructure, but also in improved maintenance resulting in less anti-social behaviour and litter.

Time Period	Owner/Manager	Objectives / Benefits (and evidence)	Major operations	Access and use rights
2002 - Present	Callendar Estate (managed in partnership with LCWA)	Public access Productive woodland Quality of life (programme of events)	Construction of formal path network	Land Reform Act

6. Future Plans

There is a mutual membership of board members between the community woodland group and Bespoke (Callendar Estate) and it is suggested that it may be possible that the woodland group could be absorbed into the company given the duplication of some activities between the company and the woodland group. Bespoke is currently investigating the feasibility of a wind turbine, which could generate funds for the community woodland.

3. Engagement and impacts timeline

Year	Event	ENGAGEMENT	Reasons (Barriers and challenges)	Changes /Impacts and outcomes Social (evidence)	Changes /Impacts and outcomes Woodland (evidence)	Changes /Impacts and outcomes Financial /Economic (evidence)
2001	Public meeting to discuss community involvement in woodland	INFORMAL ENJOYMENT to GROUP FORMATION	Need for grant funding to formalize path network in heavily used woodland	Baseline	Baseline	Baseline
2002	Consultation on major woodland operations	GROUP FORMATION to CONSULTATION	To ensure long-term group involvement.	Improved social cohesion, networking between members of the community	Improved woodland maintenance and reduced tree felling	