

Halligarth

Unst and Yell

**Experiencing Heritage –
Vision and master plan**



Halligarth's citizen scientists – past, present and future

v7. April 2021

Contents

1. Executive summary
2. Existing operations and management
3. Conservation considerations
4. Case for change
5. Vision: experience, conservation and positioning
6. Strategy: *how* vision is materialised
7. Vision components: concept development and direction
8. Phasing
9. Funding and partnerships
10. Consultation: stakeholders and advisors

1.0 Executive summary

Standing at the most northerly point of the British Isles, exposed to the harsh climate of the North Atlantic, are the islands of Unst & Yell. In 1998, the Trust was gifted eight parcels of land on Unst, the Island of Daaey, and one parcel of land on Yell by Miss I.D.J Sandison. Set amongst the wild landscape of Shetland, much of the land cared for by the Trust reflects the incredibly rich natural and cultural heritage of the islands. At its core is Halligarth House and Designed Landscape on Unst, the former home of the Saxby and Edmonston families, a local dynasty of physicians and natural scientists who wrote works on the birds of Shetland and pioneered conservation work on the islands.

Since acquisition, the Trust's vision has been to protect and interpret the heritage of the islands, and the remarkable story of Halligarth's former owners through the creation of a visitor experience at Halligarth. However, despite significant investment in recent years, a coherent and deliverable visitor experience and strategy for conservation management is yet to be realised, principally due to concerns with the viability of previous proposals, and the challenges of caring for such a remote property. This has been at the expense of the heritage: the condition of most of the built assets in Trust care is poor and deteriorating (Halligarth House has been on the heritage at risk register since 1997), a substantial collection exists but remains in unsuitable storage, and though the natural heritage of the islands is internationally significant, at present both its condition and future management potential could be better understood.

This vision and masterplan sets out a renewed approach for conservation management and the visitor experience, with the overarching interpretive *Big Idea* of: **Halligarth's citizen scientists – past, present and future.**

Defined as the practice of public participation and collaboration in scientific research to increase scientific knowledge, citizen science is at the core of Halligarth's significance: members of the Edmonston and Saxby families were not trained naturalists, but they made original contributions to scientific research through practicing citizen science, highlighting its value, and demonstrating how people of all ages and backgrounds can learn skills to observe and record the natural world. Taking this as a focus for interpretation intertwines several strands of significance: it is a conduit through which people can engage with the heritage of Unst & Yell and the story of Halligarth's former owners; and, by researching, monitoring and recording themselves, through their contributions visitors become important partners in supporting its protection.

A predominantly self-led experience will be created, targeted at local audiences. Interpretive installations will be created within the designed landscape, woodland and external envelope of Halligarth House, augmented by a programme of events delivered by local third parties. Acknowledging the remoteness of the islands, this plan also proposes ways for people to engage with and support the heritage which don't require a visit. Halligarth House will be conserved and removed from risk, but in the medium-term will not be opened to visitors. This is a key change from previous proposals: it does not preclude a future use for the building, but acknowledging the unviability of previous proposals, ensures the focus is on creating a deliverable and sustainable visitor experience.

Most notably, this plan also removes the assumption that the Trust is best placed to deliver this: it sets out to rationalise the Trust's responsibilities, maximising delivery of the visitor experience and conservation management through partnerships.

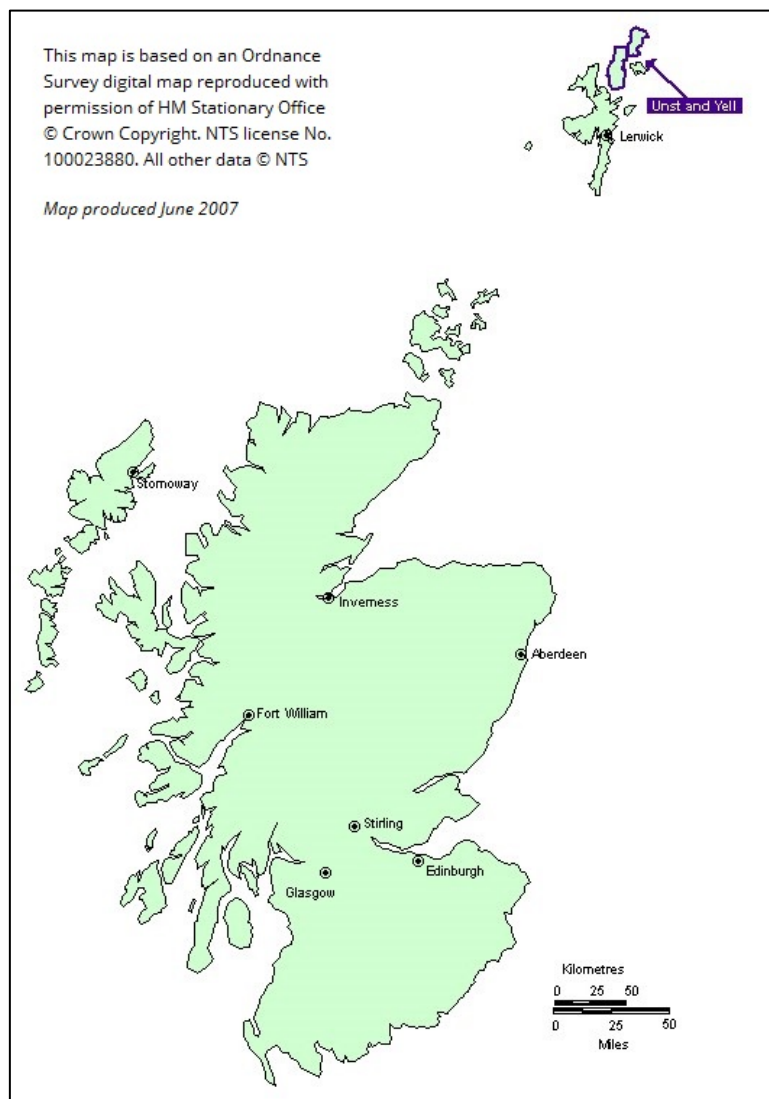
It is envisaged that phase 1 of this Vision & Masterplan (year one) will see the implementation of interpretation, landscaping, conservation of boundary walls and woodland management/ renewal within the designed landscape & woodland at Halligarth, as well as assessment of the conservation requirements of other Trust sites on Unst & Yell. Phase 2 (medium term, 1-2 years) will see the development of long term, sustainable solutions for Halligarth House and other built assets owned by the Trust. Phase 3 (longer term, 3-5 years) will see review and rationalisation of collections, and the development of online and digital content.

2.0 Existing operations and management

2.1 Existing operations, management, and role of the Trust

The Trust owns ten areas of land on Unst and Yell, incorporating four houses and several other buildings. This consists of eight areas on Unst (including Halligarth House and its surrounding designed landscape and woodland), one on Yell, and the uninhabited island of Daaey (north of Fetlar).

The property is open to visitors all year round (subject to access via ferry from mainland Shetland). The Trust provides no visitor offer or visitor facilities on Unst & Yell, except for some interpretation panels within the designed landscape at Halligarth House. None of the buildings have been opened to visitors since the Trust acquired the property in 1998. There is no permanent or seasonal Trust presence on the islands. The Trust's regional management, Estates and Buildings staff visit one or two times per year for the purposes of estate administration, compliance, and to inspect the property.



The Trust owns approximately 1487ha of land across 10 sites on Unst and Yell. A full breakdown and boundary map of each site, its management, statutory designations, and alienability is available in appendix 1. In summary:

1. Houlland, Unst	<ul style="list-style-type: none"> Houlland agricultural holding (c.99.5ha, in hand) Houlland House (unoccupied) Houlland Steading (unoccupied) Da Laggan (Shepherd's Cottage) (unoccupied)
2. Woodwick, Unst	<ul style="list-style-type: none"> Woodwick agricultural holding (c.445ha, let on agricultural tenancy)
3. Halligarth, Unst	<ul style="list-style-type: none"> Halligarth House (unoccupied) Halligarth designed landscape (c.1.5ha, visitor access) Halligarth grazings (c.32ha, let on seasonal grazing basis) Roselea House (c.0.2ha, sale agreed by ExCo July 2020)
4. Swinna Ness, Unst	<ul style="list-style-type: none"> c.25.5ha (let on seasonal grazing basis) c.5.8ha foreshore
5. Collaster, Unst	<ul style="list-style-type: none"> Agricultural holding (c.251ha)
6. Lund, Unst	<ul style="list-style-type: none"> Lund agricultural holding (c.176ha, in hand). c.88ha of Scattald¹. Lund House (deconstructed to head height due to safety c.2010). Partnership with RSPB on Lund Phalarope habitat scheme.
7. Wattlee, Unst	<ul style="list-style-type: none"> c.38.5ha (let on a seasonal grazing basis)
8. Smerrigarth (also known as Framgord), Unst	<ul style="list-style-type: none"> c.34ha (let on a seasonal grazing basis). c.32.4ha of Scattald*.
9. Isle of Daaey	<ul style="list-style-type: none"> Previously let on a seasonal grazing basis, now un-let due to difficulties with access and water supply. (c.12ha)
10. Aywick, Yell	<ul style="list-style-type: none"> c.246ha of Scattald.

2.2 Financial background today

	14/15 Actual	15/16 Actual	16/17 Actual	17/18 Actual	18/19 Actual	19/20 Budget
Income	£687	£6,051	£4,146	£3,806	£3,427	£3,427
Expenditure	-£9,922	-£27,927	£4,835	-£4,250	-£8713	-£11,437
Operating Surplus/(Deficit)	(£9,236)	(21,876)	(£689)	(£444)	(£5,286)	(£8,010)

2.3 List of significant reports and studies

- Halligarth House Interpretation Strategy, Anne Tweedie Heritage Interpretation, 2020
- Halligarth, The Home of a Naturalist, Business Plan, 2019
- Halligarth Unst, Site Survey Report, RCAHMS, 2014
- Halligarth, Unst: Survey of 'Saxby's Wood' and other trees and shrubs, 2013, James McKenzie, Shetland Amenity Trust
- Halligarth, (draft) Statement of Significance, NTS, 2013
- Unst & Yell Property Statements, NTS, 2013
- Unst & Yell Property Report, NTS, 2011
- An Assessment of the archaeological significance of NTS Property on Unst, NTS, 2011
- Quinquennial Survey, 2001

¹ Scattald, only found in the Shetland Isles, is a common grazing with a number of shareholders, each with grazing rights over defined areas of the land.

2.4 Conditions of acquisition

In May 1999, the Trust agreed to declare parts of Unst & Yell inalienable, in accordance with the wishes of the donor (Miss I.D.J Sandison)². The Trust's Council declared Unst & Yell inalienable in May 2005 (except Halligarth and Wulver's Houl on Unst, and land at Aywick on Yell).

² Letter from the Trust to Miss Sandison, dated 06 May 1999

3.0 Conservation considerations

3.1 Statutory designations

A number of statutory designations apply to Trust owned sites on Unst & Yell which confer national and international significance. A full summary of the statutory designations which apply to each site is available in appendix 1, in summary across the property there are:

- 6 Sites of Special Scientific Interest (SSSI);
- 1 Special Area of Conservation (SAC);
- 2 Special Protection Areas (SPA);
- 5 Scheduled Monuments (SM);
- 1 B listed building;
- 1 C listed building.

3.2 Cultural Heritage

3.2.1 Archaeology & built heritage

Shetland has an incredibly rich cultural heritage and some of that richness is reflected in the archaeology and built heritage cared for by the Trust on Unst. Lund, Wattlee, Framgord and Collaster are of most significance, but most of the other areas also have archaeological remains and landscapes, in the form of ruinous buildings, house mounds and field systems, with many including Horizontal Mills all dating from at least the mid-19th century or earlier. These areas also have exceptionally high potential to contain as yet unidentified archaeological remains.

Lund and the surrounding area (Lunda Wick) is one of the most significant archaeologically. The area includes an exceptional example of the remains of a Norse settlement complex (c.9th century) and the Loch of Stourhoull Standing Stone, (Neolithic c.3400 BC). Other significant remains include c.9th century Norse Longhouses, two Chambered Cairns and an Iron Age Promontory Fort (enclosed by a well-preserved orthostatic dyke at Houlland) within which can be seen the footings of at least two oblong structures.

The parcel of Trust land at Collaster contains a rare example of a vernacular Iron Age house site and midden (c.300 BC), as well as an exceptionally well-preserved farming landscape with evidence stretching back some 2,000 years.

Later remains include post-medieval settlements at Lund, Wick and Blythoull, of which the early 18th century Lund House (an example of a historic Shetland Haa House, steading and walled garden) is by far the most imposing and obviously of high status. At Wick, Trust owned land adjacent to the 12th-century St Olaf's Chapel is also of considerable significance. Whilst the chapel and extent of its Scheduled Monument designation fall outside Trust ownership, earlier underlying remains do exist within Trust land. Trust land at Framgord contains significant Viking Longhouse remains at its southern boundary and a Prehistoric Burial Chamber at its north boundary – such Viking remains are unique within the Trust's portfolio.

Halligarth House, at Baltasound is an excellent example of traditional Shetland construction, consisting of a pair of earlier 19th century buildings linked across a narrow pend, creating an unusual plan form for a large house on Unst. The house sits within a designed landscape which is significant as the northernmost designed landscape in Britain. The walled garden is the principal surviving feature of the landscape and encloses a mature woodland, extremely rare in Shetland, and the family burial ground. The significance of the property is enhanced by its associations with the Saxby and Edmonston families.

Trust management of built heritage to date has largely consisted of periodic inspection, maintenance, and disposal of buildings (with conservation agreements) not core to significance. Lund House was deconstructed to head height c.2010 to make it safe. Da Haa House (Yell) was disposed in 2013, and Wulver's Houl (Unst) in 2017.

The sale of Roselea Cottage (Unst) was approved in July 2020. Archaeological work to date has included periodic survey and monitoring, and archaeological investigation at Collaster. This was undertaken through the Thistle Camp scheme in partnership with the local community, Shetland Amenity Trust (SAT), and the University of the Highlands & Islands. A HLF funded local community project 'Let Da Stons Spaek' was also completed in 2018 independently by the Trust's Regional Archaeologist.

3.2.2 Collections

A substantial collection is owned by the Trust associated with Unst & Yell, principally acquired from its benefactor, Miss I.D.J Sandison. The collection (consisting of household and personal items associated with the lives of the Saxby and Edmonston families at Halligarth House in the 19th and 20th centuries) was accumulated with the ambition of creating a revolving exhibition display within Halligarth House. The challenge for the Trust is that a substantial collection exists in unsuitable storage (split between Houlland House and Steading on Unst and rented storage in Edinburgh, neither of which have appropriate environmental conditions), with no space for it to be exhibited; the significance of the collection is also not well understood.

3.3 Natural Heritage

Sites cared for by the Trust also reflect the nationally and internationally significant natural heritage of the Shetland islands. Woodwick, Lund and Framgord are nationally significant for their geological features, and Trust sites across the islands provide important habitats (i.e. blanket bog and serpentine vegetation) for internationally significant populations of upland waders (e.g. Curlew, Whimbrel, Red-necked Phalarope) and seabirds (e.g. Great Skuas and Storm Petrel). Whilst the natural heritage of Trust sites on Unst & Yell is internationally significant, at present its condition, significance and potential for future management is not well understood.

Trust management to date has included some monitoring work, management of grazing agreements on an ad-hoc basis, and establishment of a partnership with the RSPB for enhancement of habitats supporting Red-necked Phalarope at Lund.

4.0 Case for change

'Having few official designations this estate might be described as being important because it is typical rather than unique. However the location and range of interests is very clearly of value. What gives a uniqueness is the link to prominent Shetland naturalists of the 19th Century'.

Extract from acquisition assessment presented to the Trust's Council, February 1998

Unst and Yell present a myriad of challenges to the Trust: a short visitor season and potentially small audience, a fragmented estate, and the astonishingly remote geography of the place. Yet none of these are unfamiliar within the Trust portfolio, and one challenge prevails: despite an understanding of significance and reason for Trust ownership which hasn't substantially changed since acquisition (see above Council extract from 1998), a coherent and deliverable visitor experience and strategy for conservation management is yet to be realised.

Yet the Trust has invested substantially in proposals for a visitor experience on Unst in recent years. Previous proposals have sought to create a staffed visitor centre in Halligarth House, managed in partnership with Shetland Islands Trust (SAT). However, the significant capital and ongoing investment required for this type of experience, and concerns with the capacity of partners, have meant these proposals have been viewed as unviable.

Visitor demand isn't clear, but there is indication of an opportunity to engage: 75,000 people visit the Shetland Islands each year, and of those one third travel to Unst & Yell³. Most do so to experience the most northerly point in the British Isles, its breathtaking landscape, bird life and ecology (Hermaness National Nature Reserve records around 6,000 visitors annually⁴, with a rising trend). Anecdotally visitors do stop off at Halligarth, and there is a population of approximately 1,600⁵ across both islands who have engaged with the Trust in the past, and have expressed a desire for *something* to be done with the property. However, since acquisition the Trust has provided no consistent visitor offer or recorded visitor numbers, and of the sites in Trust ownership there is none which provides a focus for engagement, a clear story, or indication of what the Trust owns on Unst & Yell, and why.

The absence of a deliverable way forward has been at the expense of the heritage, and the local community has expressed some frustration with the Trust's approach to date. The condition of most of the built assets in Trust care is poor and deteriorating (Halligarth House has been on the heritage at risk register since 1997). A substantial collection exists but remains in unsuitable storage, and though the natural heritage of the islands is internationally significant, at present both its condition and future management potential could be better understood.

The case for change on Unst & Yell is clear: previous approaches have not worked, so realistically what can be delivered? A further factor is the death of Unst & Yell's donor (Miss I.D.J Sandison) in March 2020, meaning the Trust now has sole management responsibility for the property, and a capital sum for investment in a visitor experience at Halligarth is available, in line with Miss Sandison's wishes.

To progress, it is suggested that two previous assumptions are removed:

- 1) A staffed visitor offer is the only way to engage: Managed remotely and without on-site staff, how can the Trust create a visitor experience on site which still brings to life the significance of the property (for a potentially small audience)? And acknowledging remoteness, are there ways to engage which don't require a visit?
- 2) That the Trust is best placed to deliver this: for core areas of significance, how can the Trust guide conservation management and interpretive direction, but in a way which is sustainable, with delivery on site potentially through partners?

³ Shetland Islands Visitor Survey 2019, Shetland Islands Council Visit Scotland, 2020

⁴ Management Plan for Hermaness National Nature Reserve 2016-26, Scottish Natural Heritage, 2016

⁵ 2011 Census

5.0 Vision: experience, conservation and positioning

Halligarth's citizen scientists – past, present and future

Halligarth's families – the Edmondstons and Saxbys – have pioneered 'citizen science' on Unst since the early 1800s, establishing a nationally important long-term dataset. By recording their own observations at Halligarth, present and future visitors continue this legacy and can make valuable contributions to the study of environmental change over time.

5.1 Vision Objectives high level

1. Interpretation and experience

- Halligarth is where the Trust engage on Unst & Yell. Landscaping and interpretive installations in the designed landscape, woodland and exterior of Halligarth House provide an attractive and engaging visitor experience, and all abilities access. Through this presence, the Trust will be visible: our role in protection of sites across the islands, and how our cause can be supported.
- Citizen science is the vehicle for engagement at Halligarth, creating a fun and engaging experience, targeting local audiences (families, children, school/ educational groups). The natural and cultural heritage of Unst & Yell are interpreted together, through visitors enacting Halligarth's intangible heritage of citizen science. Visitors are important partners due to their monitoring and recording contributions, encouraging repeat visits.
- Interpretation and visitor experience is led by the Trust (interpretive infrastructure and programming), but the visitor experience is predominantly self-led, and augmented by events and activities delivered by local partners.
- People will be able to engage with this place, regardless of whether they are able to visit. On site experiences will be augmented by a vibrant and engaging online presence.

2. Conservation

- Halligarth House is conserved and removed from risk, but in the medium term is not occupied. The surrounding designed landscape is managed but not restored.
- The natural and cultural heritage of other sites on Unst & Yell is protected through monitoring and management, which is targeted to the significance and specific needs of each site, guided by up to date assessment. This will be led by the Trust but implemented where possible through local partners.

3. Financial and operational

- Trust management continues remotely, with no permanent or seasonal staff presence. The Trust leads management, but partnerships established with third parties mean where possible work on site is not Trust led.
- A focus on establishing partnerships for property management and conservation means the property is able to sustain its own operating costs.
- Buildings and sites are retained and protected by the Trust only where they are core to significance, or serve an operational function.

5.2 Interpretive Strategy

Future interpretation will bring together the cultural and natural heritage of Halligarth, especially the involvement of its people – past, present and future – in documenting, monitoring and preserving its key habitats and species. The focus will be on Halligarth, but with links to relevant natural and cultural heritage stories on wider Unst and Shetland.

5.2.1 What will be included?

This strategy focuses on the families who lived at Halligarth, and the important scientific contributions they made. These include Laurence Edmonston and his son Tom, his son-in-law Henry Saxby, Henry's son Thomas and grandson Stephen. Between them, they studied the weather, bird life, insects, trees and other flora over four generations at Halligarth.

Whilst interpretation will include links to the wider natural and cultural heritage of Unst & Yell, interpretation at Halligarth will focus on stories related to the heritage visitors can see in front of them. Therefore, the emphasis at Halligarth will be on habitats and species present on the site itself which the visitor, at least seasonally, might have the opportunity to observe first hand.

5.2.3 What's not included?

This strategy recommends omitting interpretive strands focused on geology (covered by the Shetland UNESCO Global Geopark) and folklore. As it is proposed not to open Halligarth House to visitors, there is less opportunity for in-depth interpretation on-site about the detailed history of the Edmonston and Saxby families and their everyday life at Halligarth.

5.2.4 The Big Idea⁶

Halligarth's families – the Edmondstons and Saxbys – have pioneered 'citizen science' on Unst since the early 1800s, establishing a nationally important long-term dataset. By recording their own observations at Halligarth, present and future visitors continue this legacy and can make valuable contributions to the study of environmental change over time.

In shorthand form, the Big Idea boils down to: **'Halligarth's citizen scientists – past, present and future.'**

The rationale for this Big Idea stems from the fact that the natural heritage of Halligarth is in itself not inherently significant. While Saxby Woods is unique on Unst and has importance as Britain's most northerly woodland, it contains few rare species or particularly special habitats in a national context. Nor does it provide unusual opportunities for nature conservation. Of much more significance is what the Edmonston and Saxby families accomplished here in relation to natural heritage research and conservation, and in their work to promote and create habitats for wildlife. Therefore, the focus of the interpretation should be on the human activities of caring for nature, as much as on nature itself.

⁶ The American interpretation planner Beverly Serrell developed the concept of "The Big Idea" as a way of helping exhibition planners with "an unambiguous focus for the exhibit team throughout the exhibit development process by clearly stating in one noncompound sentence the scope and purpose of an exhibition."

5.2.5 Primary interpretive themes

Primary interpretive themes are the building blocks – the core content – on which the interpretive programme is based. They identify and convey the unique significances of Halligarth. They are the key ideas through which fixed elements and programmes communicate with the public. *They connect our stories to the larger ideas, meanings, and values (the intangibles) to which all visitors can relate.* These overarching stories that we tell as part of the project are constant, no matter who the audience is or the storytelling methods we use.

Three primary interpretive themes to anchor interpretation at Halligarth are proposed below. All fall under and help support the Big Idea. Some of the themes will be interpreted in distinct areas of the property, while others may appear throughout as relevant to individual stories.

Theme 1: The woodland

In the 1830s, Laurence Edmonston planted a woodland at Halligarth to encourage biodiversity; as Britain's most northerly woodland today and a rare environment in Shetland, it offers an ideal laboratory for today's naturalists to test and observe how (and which) trees and plants survive under these extreme conditions.

Theme 2: Citizen scientists

Although members of the Edmonston and Saxby families weren't trained naturalists, they made original contributions to scientific research, highlighting the value of citizen scientists and demonstrating how people of all ages and backgrounds can learn skills to observe and record the natural world.

Theme 3: Global significance

Knowledge collected locally on the flora and fauna of Unst and Shetland by the Edmonston and Saxby families influenced scientific thought at a national level; today local observations have the potential to contribute to global conversations about climate change and its impact on species like migratory birds.

5.3 Vision Impacts

<i>Protection</i>	<ul style="list-style-type: none"> Halligarth House and designed landscape is protected and transformed into an engaging and accessible visitor experience. The natural and cultural heritage of other sites across Unst & Yell is fully understood. Condition and significance is improved through ongoing conservation targeted to the specific needs of each site, undertaken with partners. Visitors are engaged as partners in protection and monitoring, increasing the value they place on the heritage. Contribution to climate change mitigation through peatland restoration.
<i>Experience</i>	<ul style="list-style-type: none"> Provision of a predominantly self-led visitor experience in the designed landscape of Halligarth targeted at local audiences, which interprets the natural and cultural heritage together through the intangible heritage of citizen science. A vibrant online presence augments the on-site experience, providing engagement for those unable to visit.
<i>Promotion</i>	<ul style="list-style-type: none"> Role of the Trust in the care of Unst & Yell is visible, through on-site interpretation and online presence. People understand our cause, and can support it whether or not they are able to visit.
<i>Support</i>	<ul style="list-style-type: none"> Trust responsibilities rationalised, so the property sustains its own operating costs. Partnerships and participation in third party schemes (e.g. peatland restoration) increases support for conservation work.

6.0 Strategy *how* vision is materialised

6.1 Halligarth House and Designed Landscape: ‘Meet the people, do the science’

The focus for Trust engagement on Unst & Yell will be through physical interpretation within the designed landscape and woodland of Halligarth House. The visitor season on Unst is short, and visitor numbers from further afield limited. The target audiences for Halligarth are seen largely to be local (e.g. children, families and school/educational groups from Unst & Yell) and virtual ones. However, there are also likely to be small numbers of tourists (who are likely to have an interest in ornithology, and may have pre-existing knowledge about Halligarth due to the reputation of Saxby Woods for attracting rare birds).

Halligarth’s remote location means it is likely to be a stop-over rather than destination site. The visitor journey is therefore estimated to be 45 minutes to one hour for most casual visitors. The visitor experience is designed to be entirely self-led, but facilitated programming by partners could deepen the experience year around for school groups and locals and seasonally tourists.

The cultural and natural heritage of Halligarth (and more widely Unst & Yell) will be interpreted together through visitors enacting the intangible heritage of citizen science. This will encourage repeat visits from local audiences, which will be key to Halligarth’s success. The advantage of this approach is that the volume of data collected is important, so that if families can be encouraged to contribute every time they visit, they perform a valuable service to the site and to the scientific community: it can be explicitly stated on site that visitor’s contributions are valued and they are needed, providing a compelling reason to return. Activities and interpretation onsite will therefore benefit from seasonal variation.

There are also many opportunities to tie into the school curriculum in STEM subjects, and local schoolchildren have the potential to be the most frequent users of Halligarth. With very few trees, providing children with the opportunity for forest play is valuable. The walled garden feels like a ‘place apart’ from the rest of Unst and an interpretive light touch will ensure it remains wild and atmospheric. For tourist families heading to Hermaness, it could be marketed as a picnic stop to break the journey.

6.1.1 Designed landscape and woodland

Whilst there is no intention to restore the designed landscape to its late 18th or early 19th century appearance, limited landscape works are required to create an attractive visitor experience, support the proposed interpretation, and retain and expand the all-ability path network, enabling people of all ages to enjoy the site.

A programme of conservation works will consolidate the rubble stone boundary walls surrounding the designed landscape and woodland. The condition of the woodland (largely consisting of sycamore trees) will be assessed, and a programme of management and renewal implemented to secure the long-term conservation of the most northerly woodland in the British Isles.

Modest physical interventions will deliver moments of ‘surprise and delight’, providing interpretation, engagement and creative learning opportunities for visitors of all ages. Shelters and bird hides will provide visitors with some protection from weather, extending visitor dwell time, enabling deeper engagement with the site and its stories. Materials will be robust, and able to withstand the site’s harsh conditions.

6.1.2 Halligarth House

In the medium term Halligarth House will be protected, but not occupied. Conservation works to the exterior will remove the building from risk, securing it in a weathertight, mothballed condition. This will also ensure the house can be integrated as an attractive backdrop to the visitor experience. Augmented reality through visitors own digital devices could bring the house to life, with stories of the Edmonston and Saxby families. This approach does not preclude a future use for Halligarth House. However, it recognises that previous proposals have not been

deliverable. The medium-term focus is therefore on creating a deliverable and sustainable visitor experience within the designed landscape.

6.1.3 Research Hubs

At the core of the visitor experience is the creation of four 'Research Hubs' within the designed landscape and woodland, which encourage visitors to explore and discover Halligarth at their own pace. Each hub is focused on a different topic, but incorporates a number of common elements. These include: interpretation, short citizen science activities and opportunity for physical play. Some of the research could incorporate additional research tools that visitors can use, which could be stored onsite during peak season and brought out for booked groups the remainder of the year.

Welcome:	<ul style="list-style-type: none"> Existing site entrance west of Halligarth House. Gathering place, orientation, parking, electric car charging, bike racks.
Research Hub 1: Climate Trail	<ul style="list-style-type: none"> This first research hub is clearly visible from the site entrance to draw visitors in. Visitors immerse themselves in how the climate influences the landscape.
Research Hub 2: Saxby Woods	<ul style="list-style-type: none"> Placed on the opposite side of garden to draw visitors in. As there is no undergrowth, it will be visible from the entrance gate. Woodland ecology, ornithology, bird hides.
Research Hub 3: The Meadow	<ul style="list-style-type: none"> Located south-east of Halligarth House to draw people around the side of house in part due to the view to Baltasound. Flora and fauna, fabulous view to Baltasound, a sheltered lunch spot for school visits and resting spot for dog walkers. Location from which augmented reality through visitors own devices could bring Halligarth House to life.
Research Hub 4: Insect Yard	<ul style="list-style-type: none"> West of Halligarth House. Bug hotels, local flora and fauna, opportunity to gather, study and contribute to the development of local wildlife.

6.1.4 On site programming

A programme of one-off and annual events could augment the self-led visitor experience at Halligarth, co-ordinated by the Trust, but developed and delivered by local partners.

Basic infrastructure provided by the Trust will enable activities to be implemented by local partners, based around the interpretive focus on citizen science. For example:

- Annual or seasonal BioBlitz, aimed at families and tourists. Schools could undertake annual surveys at specific times of year.
- RSPB Annual Garden Birdwatch.
- Family days in the summer could be based around making bug hotels, bird boxes or feeders, or reseeded the meadow.
- A Friends group could coordinate volunteers onsite to deliver programming or participate in work days (e.g. maintaining bird feeders, the bug hotel and assisting with gardening.)

6.2 Digital Engagement

The absence of staff on-site presents a challenge for visitor engagement. Also, the geography of Unst & Yell means Halligarth is not likely to attract large visitor numbers. A digital component (e.g. through apps on visitors own devices) could augment the on-site experience, providing:

- Access to additional interpretation, learning resources, maps;
- A place to record on site observations;
- Augmented reality to bring Halligarth House to life.

The aim of using digital components would be to augment the visitor experience on site, enabling a deeper understanding of Halligarth and Unst. However, balance will be needed to ensure visitors are not focused on their phones whilst neglecting the amazing environment they are in. The key for digital engagement at Halligarth will be to magnify the surroundings. To be successful, the digital experience will need to be as '*frictionless*' as possible, meaning it is immediate, intuitive and inclusive. The experience shouldn't require the user to read complicated instructions or learn complex new interfaces. Any components developed (e.g. apps) would be designed to run on most modern day devices (e.g. Apple and Android). Further discussion would also be required to ensure what is developed works alongside any wider proposals within the Trust for digital engagement.

In addition, a vibrant online presence (i.e. through an actively managed website) could provide a place for existing visitors to log observations recorded on site, for potential visitors to learn more prior to a visit, and for an entirely virtual audience, an opportunity to engage with a site they may never be able to visit.

6.3 Conservation Management

6.3.1 Natural Heritage

The overall approach to natural heritage on Unst & Yell will be one which targets management which is appropriate to each site.

The scale of blanket bog across Unst means it presents one of the biggest opportunities in the Trust's portfolio for peatland restoration. Re-wetting (through preventing drainage and repairing erosion) of dried out and hagged peatland is a key objective within the Trust's Plan for Nature, and will significantly enhance biodiversity and the potential for carbon sequestration from the atmosphere, contributing towards mitigation of climate change. Feasibility studies followed by targeted restoration of appropriate sites can be fully funded through the Nature Scot Peatland Action Fund. There is opportunity for this work to be co-ordinated by the Trust but delivered by contractors, meaning enhancement can be achieved without a permanent staff presence.

There is also potential to enhance habitats which support internationally significant upland wader and seabird populations. Enhancement is heavily influenced by the impact of grazing (e.g. regulating sward conditions, and whether livestock are present during the breeding season). The establishment of conservation grazing targeted on a site by site basis through long term grazing licenses/ agreements presents a major opportunity for enhancement. Initial work is required by the Trust to better understand the condition and future management potential of each site, to establish a baseline understanding of populations for future monitoring, and periodic co-ordination of grazing. However there is no requirement for a permanent staff presence.

Whilst management of natural heritage on Unst & Yell does not require a permanent staff presence on-site, collaborative management and partnerships will be key. Partnerships with other organisations represent an opportunity for the Trust on Unst & Yell, for example for future on-site monitoring (a partnership already exists with the RSPB at Lund), and potentially for management of some sites. Tenure of land is an issue, as the ambition for peatland restoration and grazing managed for conservation have potential to conflict with other interests. Careful ongoing co-ordination of grazing agreements and engagement with tenants is required.

Initially, a process of assessment and understanding is required, as the condition of Trust properties across Unst & Yell is poorly understood. Baseline assessment will ensure future management can be tailored to each site and the opportunities it represents, and where natural heritage interest is low there is opportunity to identify sites which could be disposed, reducing the Trust's responsibilities

6.3.2 Cultural Heritage

Archaeology

There is opportunity to build upon work already undertaken to engage people with the archaeology of Unst through future programming of events and projects. Previous work has demonstrated that there is an active interest in the archaeology of Unst: c.100 people participated in public excavations during 2018. Programming could be co-ordinated by the Trust in partnership with the local community and organisations. Partnerships also represent opportunities for management and interpretation: future monitoring of archaeology could be supported by the local community, and interpretation of the Trust's sites and artefacts augmented by partners (e.g. interpretation at Unst Heritage Centre).

There is also some work (and funding c.£20.k) required to complete archaeological excavation started at Collaster, and to analyse associated artefacts (the outcome of analysis could represent a significant opportunity for promotion and engagement). Whilst there are big opportunities for future investigation and engagement with archaeology, there is sufficient understanding of the archaeological significance of Unst & Yell from previous investigation (as noted in 3.2.1) to support a process of review and rationalisation of the Trust's ownership on the islands.

Built heritage assets

In addition to Halligarth House, the Trust owns four other principal buildings on Unst (Roselea House⁷, Houlland House, Houlland Steading and Da Laggan (Shepherd's Cottage)). All are unoccupied and due to their deteriorating condition considered at risk. An assessment process for each is required, to be undertaken through the Trust's Asset Management Strategy Group (AMSG).

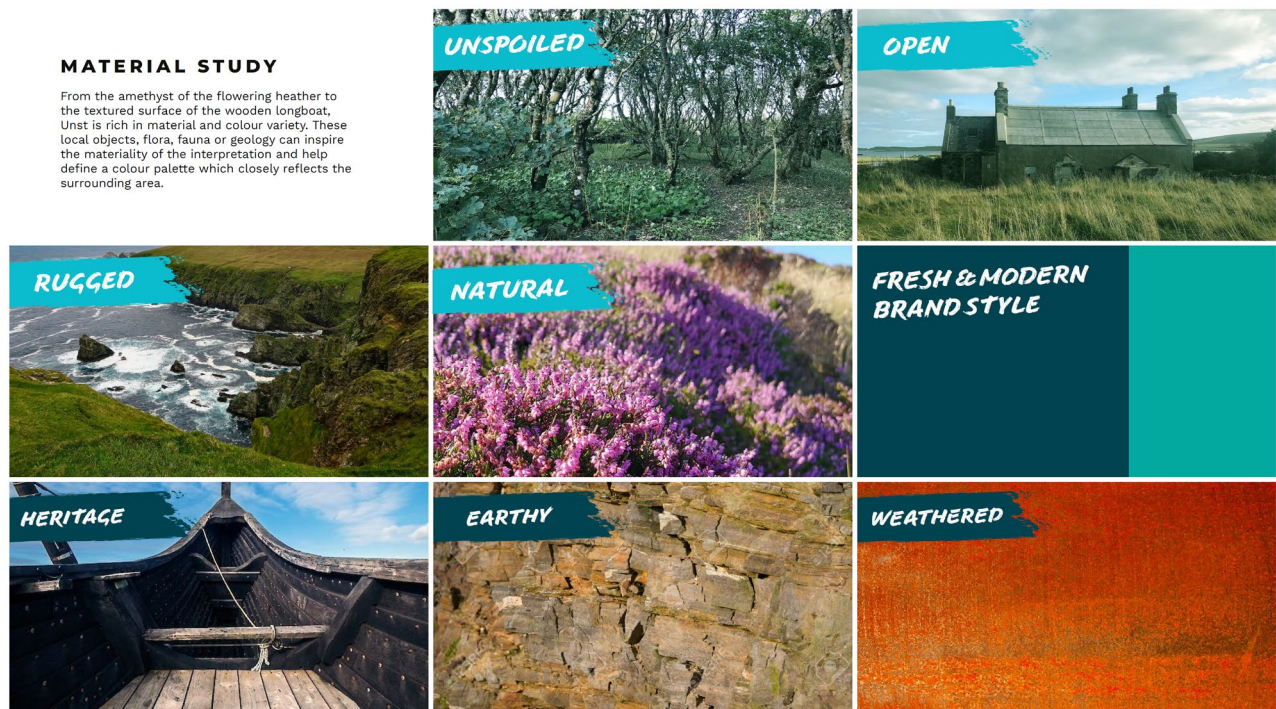
Collections

A rationalisation project will review the significance and provenance of the whole Unst & Yell collection (presently held at the Trust's stores in Edinburgh, and within Houlland House and Steading).

⁷ Disposal of Roselea House was approved in principle by ExCo in July 2020

7.0 Vision components concept development and direction

7.1 Approach to interpretation at Halligarth



Mood Board



Incorporation of Trust Brand Style within interpretation

The overall approach is for interpretation to be *'Rugged but modern'*. Interpretation needs to be very durable and able to withstand strong winds and rain when out in the open. The idea of using sharp angles runs throughout the design concept. Combining weathered materials such as Corten steel with the Trust's modern and fresh brand style has to be done with the right balance. Using the illustration style and colour scheme helps to signify different zones or species.

Materials (such as Corten steel and timber) will be selected carefully to ensure interpretive components remain in good condition for many years within the harsh climate of the site. However, ongoing maintenance costs will be a factor, particularly for graphic elements which can easily be stripped off and renewed.



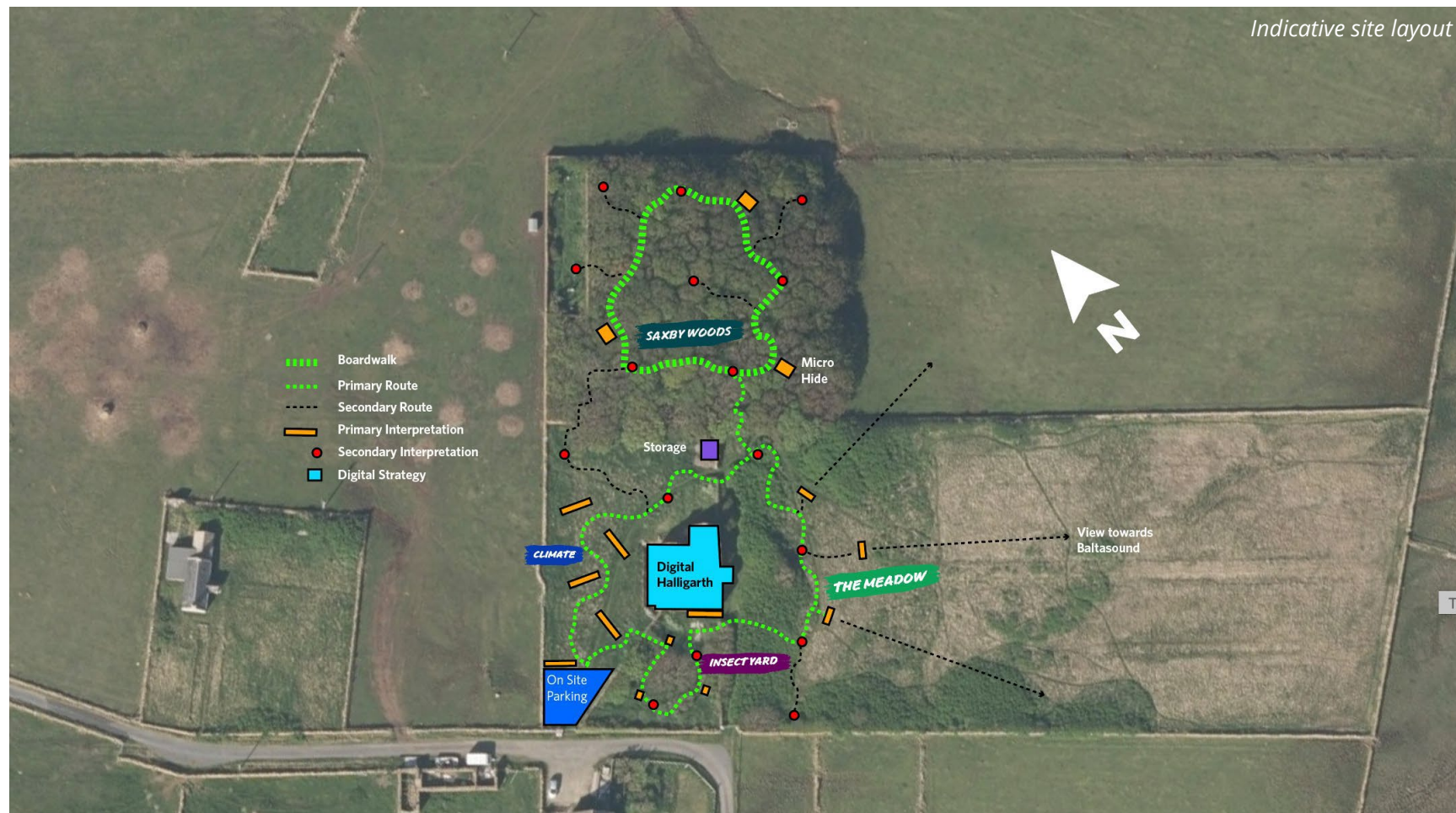
Strong materials which can weather over time which adds character. Colour tone also blends in very well with the natural environment.

When designing the panels, the colour scheme can be chosen based on the site surroundings.



7.2 Halligarth site layout & interpretive components

The site layout will encourage exploration and discovery when visiting Halligarth. A set of trails will encourage the visitor to explore the site at their own pace, travelling in the direction of their choice. The below site layout demonstrates how the four Research Hubs described in 6.1.3 could be positioned on site. Key interpretation panelling and shelter spaces will help visitors shape routes themselves, providing different activities to participate in at each hub. Wayfinding posts with hidden gems of information will be scattered across the site, some located off the beaten track to add to the element of discovery and reward when finding them.



7.2.1 Welcome Zone

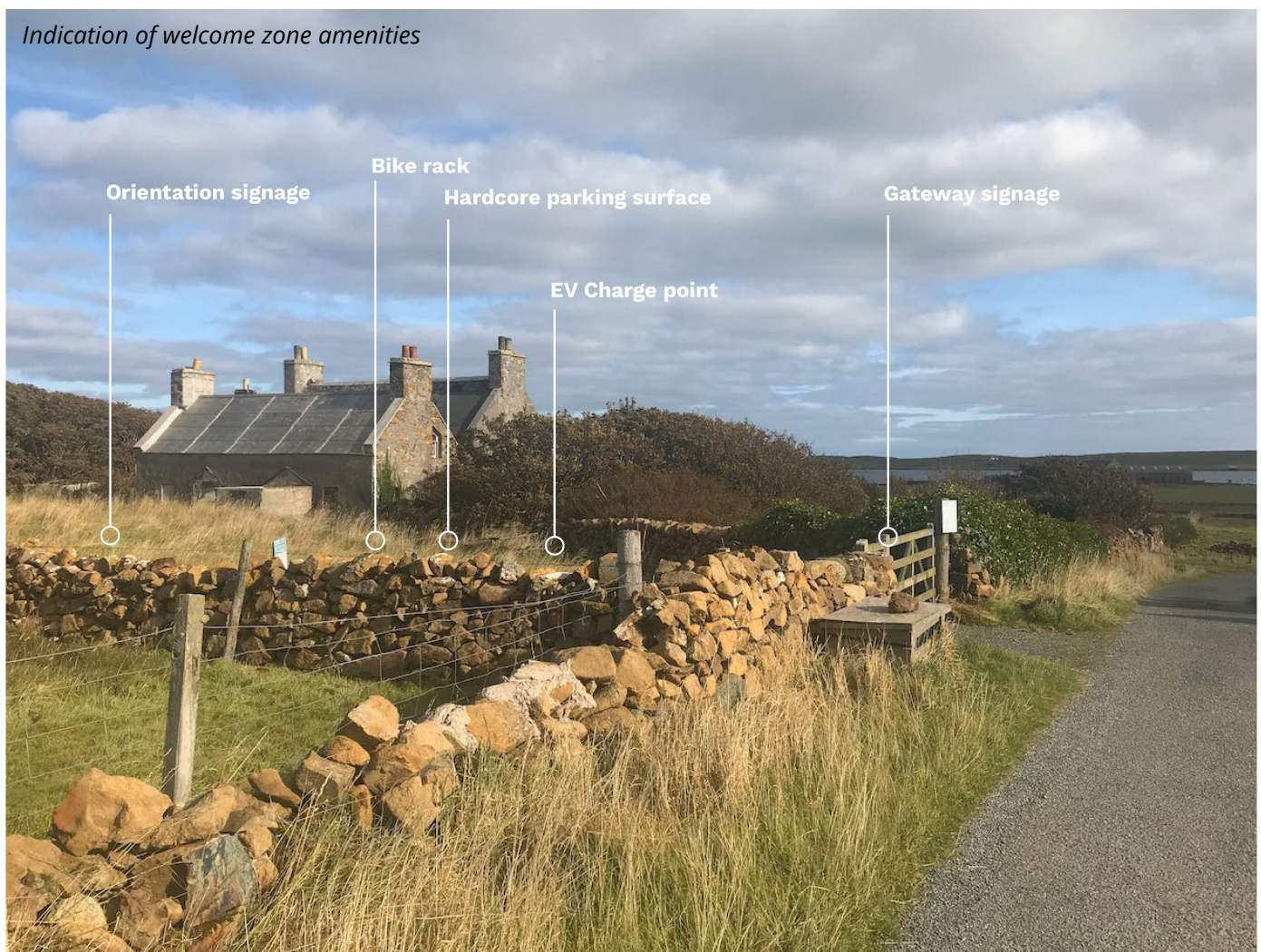
The welcome zone is the arrival point to Halligarth, with a distinctive gateway sign encouraging visitors in from the roadside. This area will act as an initial gathering point and clearly sets out what the site provides. This area will be accompanied by an explorer themed map interpretation panel which sets out the key activity areas.

This area can contain infrastructure including a parking area, electric car charger and bike racks.

Orientation signage concept with map



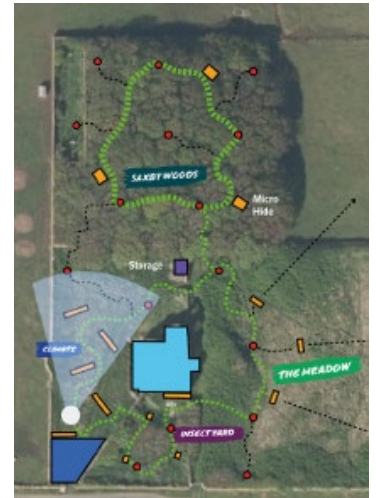
Indication of welcome zone amenities



7.2.2 Research Hub 1: Climate Trail

The Climate trail is an opportunity for visitors to immerse themselves in how the climate can shape the landscape, and the challenges we face today. The graphical interpretation will act like a set design of key landscapes taking the visitor on a journey through the landscape and climatic changes. Graphic panels and hands on experiences will shape the route and set the tone of discovery and exploration throughout the site.

Landscaped features (e.g. mountains, flooded areas, eroded landscapes, towns and cities) can help demonstrate how the landscape is shaped by climate, illustrate the climate challenges we face today, and also how the climate can be embraced for our benefit (e.g. renewables).



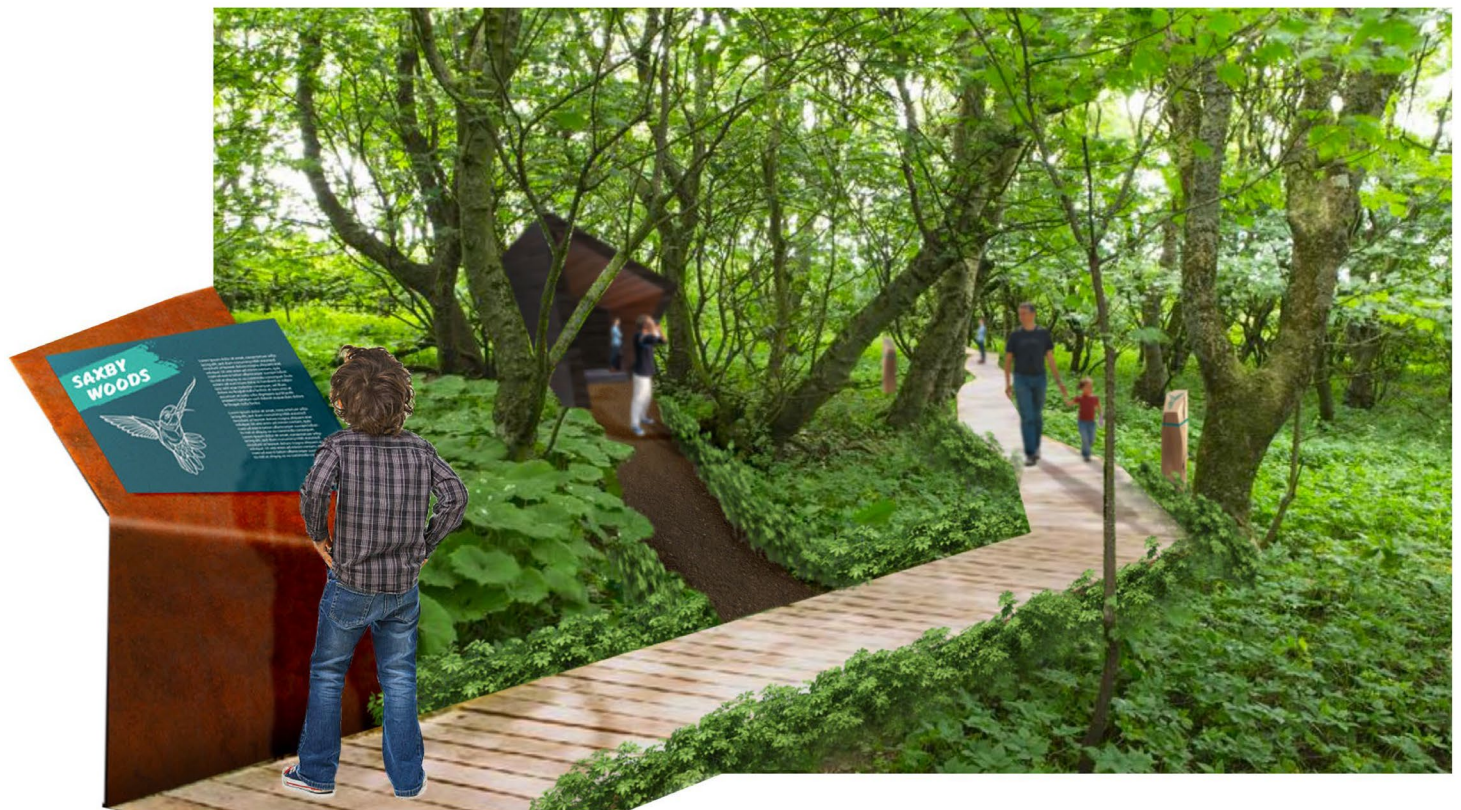
7.2.3 Research Hub 2: Saxby Woods

Saxby Woods will be enhanced through the introduction of a boardwalk which meanders through the existing woodland space, extending the all abilities path network.

Micro hides will be located in different corners of the woodland to provide different perspectives from which to encounter birds and other fauna.

The hides themselves will appear a part of and sculpted by the landscape using material relevant to place. Each of the bird hides can take different forms depending on the direction they are facing and the immediate context of surrounding branches and trees.

The hides within Saxby Woods could be used to support the proposed on-site programming (e.g. RSPB Annual Garden Birdwatch).





Bird Hide Concepts: sheltered but still open to maximise viewing -
materiality blends into the woods



Angular shapes that fit into the environment and surroundings

7.2.4 Research Hub 3: The Meadow

The Meadow is an opportunity for visitors to look out beyond the Halligarth site.

Currently the spectacular view out can be compromised by the significant exposure to the elements throughout this area of the site. Several sheltered spaces will allow visitors to gather and reflect on their experience of Halligarth. The shelters will be oriented in different directions to generate different views and offer alternative protection from the weather.

The shelters themselves will be set into the topography of the site and roofed with local flora. This will help the structures to seamlessly blend into the landscape. The structures could be used as the focal point for the proposed on-site programming, providing sheltered areas for partners to deliver activities and demonstrations (e.g. making bug hotels, bird boxes or feeders, and re-seeding the meadow). The shelters could also provide a meeting and lunch spot for school and family visits, as well as a resting spot for local dog walkers.



The shelters blend in to the landscape of The Meadow and frame views out



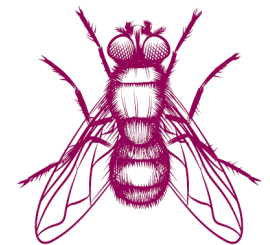
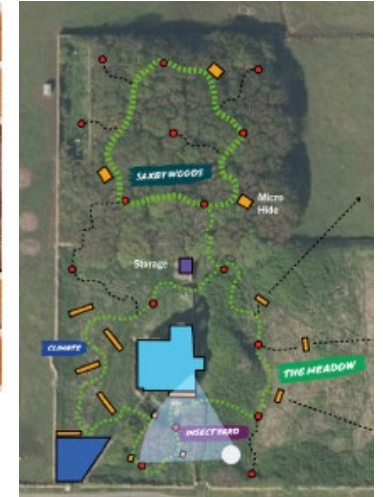


7.2.5 Research Hub 4: Insect Yard

Following on with the same style as the three previous areas, the Insect Yard will have a series of 'hotels'. The angular shape is consistent with the rugged shapes of the other interpretation and structures. In a similar way to The Meadow shelters, moss/plant life can help to blend the structures with their surroundings.



Mini insect hotels will be broken up across the Insect yard. These installations will house growing areas for local fauna, integrate interpretation whilst also creating a home for the insect life. This area could be a great opportunity for the community and local schools to gather, study and contribute to the development of local wildlife, and provide a further focal point for the proposed on site programming (e.g. for an annual BioBlitz and other annual surveys).

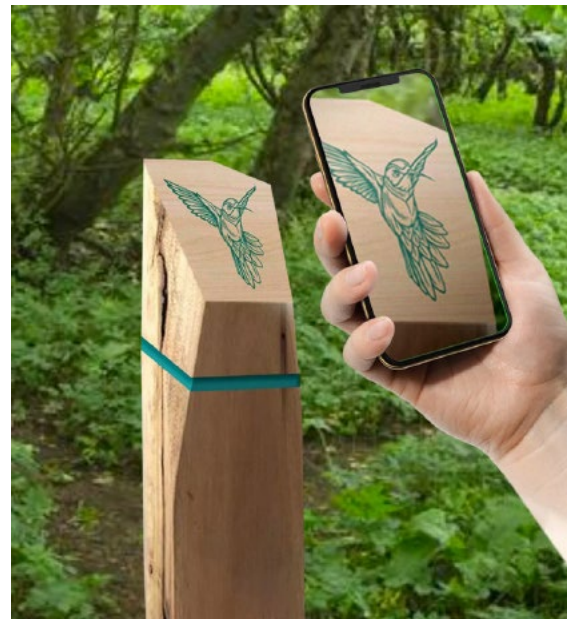


7.3 Digital Components

7.3.1 Halligarth App: Collecting

A blended collecting concept will combine both the physical and digital worlds. Throughout the site there will be robust, angular colour coded marker fingerposts for visitors to discover. Once found these can be collected by either creating a crayon rubbing of the icon image or scanned in using a digital smartphone app.

A Halligarth Digital App would include different modules. One would be a score card which tracks the markers found. Facts and information can be released on screen every time a marker has been captured, providing a fun learning experience as more and more markers are discovered. Additionally, when a zone is completed, the user could be rewarded with bonus content, which could be in the form of video or interactive 3D models.



For the Halligarth site as a whole, the level of information required would be manageable without the need and expense of a Content Management System (CMS). Content could be programmed to change over time (potentially seasonally) to encourage repeat visits from locals.

However, if the initiative was expanded (e.g. to include other Trust properties), the introduction of CMS system would be recommended to keep track of content. With this a user account system could be created, with leader boards for visitors who have collected the most tags.

Several different methods could be used to enable active scanning of the finger posts; from embedding with Radio-frequency identification (RFID) Chips, using image recognition to launch content, or having QR codes for scanning on the posts. Further investigation and testing would be required to see which one these solutions would be the most robust and reliable to use at Halligarth.



7.3.2 Halligarth App: Unlocking the Maps

An additional module for the Halligarth App which could work in tandem with the Collecting functionality is a Map Quest feature. A mapping element could display the layout of installations around the site and give background information. The focus on exploration could be reinforced with a map in the style of a treasure map, relating back to the roots of Robert Louis Stevenson's *Treasure Island* map and its ties to Unst.

Using a trope familiar to video games players, maps would not be available at the start of the visitor journey (only the Welcome Area would be visible), encouraging visitors to go and discover. Maps could be unlocked by zone, slowly revealing more as the user made their journey around the site. More gamification could be added to include sub quests, potentially with tasks which need to be completed within a certain time.

The methodology for unlocking maps could be based on the visitor's geolocation as they move around the site, or be tied in with the Collecting Module, with maps unlocked by scanning fingerposts within each zone.

*Hidden map elements
which can be unlocked
as you explore the site*



Map Concept

7.3.3 Bringing Halligarth House to life

Halligarth House could be brought to life by using Augmented Reality and the visitor's own device, creating an immersive experience. The south-east facade of Halligarth House which looks out onto the Meadow could be transformed into a storytelling canvas. As physical shelters are proposed in the Meadow, digital engagement from this location means it can be experienced even when weather conditions are poor.

Using the app on a smartphone or tablet device, Halligarth House could become an interactive storybook using Augmented Reality to tell tales of the family members that called it their home. This immersive experience would be around 4- 5 minutes in duration, and would be enhanced with voiceover and music.

Taking inspiration from the Victorian artwork that dotted the pages of Jessie Saxby's short story books for children, this style of illustration would work well over the stone facade of the house.

"Imagine the artworks of nature coming to life over the wall of the house itself....flowers growing up the stonework, insects scuttling about and birds flying on the roof, whilst hearing about the Edmondstons and Saxbys and their contribution to recording nature and science over the years."

To achieve this, cloud anchor functionality⁸ could be used within IOS's ARKIT and Androids ARCORE technologies⁹, with digital content geolocated on to the facade of the house. This would allow anyone with the app to play this experience and interact with its content. On site testing would be required to measure the strength of signal for GPS placement to avoid drift¹⁰, and if necessary, GPS boosters could be deployed on the house itself. Content could be filmed on site and then made available online for those unable to visit the site themselves.



⁸ Cloud Anchor Functionality allows users to see virtual objects together with the image of a physical space on their screen, within an Augmented Reality scene.

⁹ IOS ARKIT and Android ARCORE are the frameworks used by Apple and Google respectively to support Augmented Reality on their devices.

¹⁰ Where digital content loses its pinned position.

7.3.4 Using existing Apps

Existing apps could be used for recording and identification of species, which are free to download and use. Further engagement with Trust specialists will be required to ensure data collection through these apps is cognisant of the Trust's own monitoring programmes, to ensure visitor recordings in this way make a useful contribution to the Trust's work.

iNaturalist is an observation and recording app and website created by the California Academy of Sciences and the National Geographic Society, with over 3.5m users and 58m observations worldwide. The app is easy to use and allows users to take photos of observations to add to recordings.

iSeek is a separate app with built in artificial intelligence to help immediately identify a species, or link to an expert to help identify it.

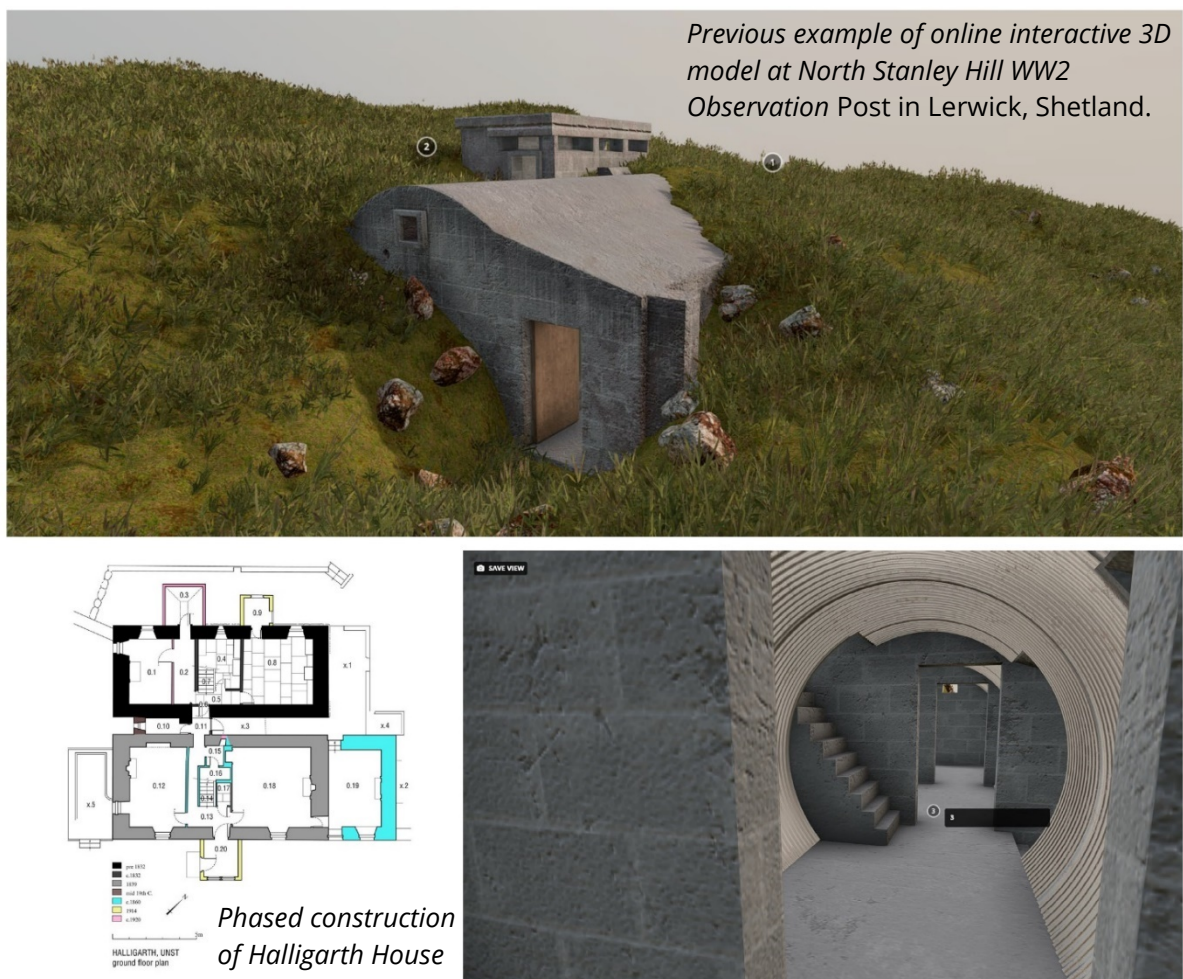
The functionality of these apps would work well at Halligarth, and allow visitor to engage with a worldwide community of nature enthusiasts. Both apps are designed to be used with school children, and have guides for teachers. They can also be used to host events such as a BioBlitz - which is a communal citizen-science effort to record as many species within a designated location and time period as possible. Key data and maps from the iNaturalist website highlighting Shetland's observations could be integrated or linked into a website for Halligarth.



7.3.5 Online presence

As noted in 6.1.4, a vibrant online presence (i.e. through an actively managed website) could provide existing visitors with a place to record their observations, potential visitors with a place to learn more prior to a visit, and for an entirely virtual audience, an opportunity to engage with a site they may never be able to visit. An actively managed website could include:

- A citizen science hub, where visitors could log in and enter data they have collected on site;
- Live camera feeds;
- Interpretation and learning resources;
- A 3D model of Halligarth House (this component is explored further below as an example).



A 3D model of Halligarth House could provide a further opportunity to engage with audiences who are unable to visit. The architectural merit and history of the house itself could be explored, with a digital model illustrating different phases of construction, as well as historical photographs of the interior and exterior. The 3D model could be created from a combination of architectural drawings and drone footage, and be hosted on the Sketchfab website (a 3D repository which can be easily embedded and shared on other websites and social media feeds). This would also allow people to interact with the Halligarth model using Augmented Reality, which enables them to have a version of the model within their homes to explore.

7.3.6 Digital Maintenance

For all digital engagement elements at Halligarth, digital maintenance would need to be factored in as an ongoing cost. This can be managed through a service level agreement with an external contractor, with a per year cost for digital maintenance of the app. This would typically cover the upkeep of the app, and making sure any updates to the IOS and Android operating systems were completed. This would not include any updates to content which are typically priced by contractors upon request.

8.0 Phasing

The following provisional programme is envisaged for implementation of the strategy outlined in section 6:

	Phase 1 <i>(short term, first year)</i>	Phase 2 <i>(medium term, 1-2 years)</i>	Phase 3 <i>(longer term, 3-5 years)</i>
Halligarth designed landscape & woodland: landscaping works; boundary wall conservation/ consolidation; woodland management/ renewal; implement of on-site interpretation.			
Conservation management: assessment of conservation requirements of other sites in Trust ownership; scoping partnerships.			
Halligarth House & other built assets: develop future use.			
Collections: review and rationalisation.			
Online and digital content development.			

9.0 Funding and partnerships

9.1 Potential partnerships

The establishment of partnerships with third party organisations is at the core of this vision and masterplan. The following potential partnership opportunities have been identified:

- **NatureScot (NS)** is the public body responsible for Scotland's natural heritage. NS have a significant presence on Unst, as managers of the Hermaness National Nature Reserve, and expressed an interest in establishing a partnership with the Trust for previous proposals for Halligarth in 2018.
- **RSPB** has a significant presence on the Shetland islands, managing four nature reserves on the islands (including the island of Fetlar, to the east of Unst). RSPB currently works in partnership with the Trust on the Lund Phalarope scheme, and could be approached to establish future conservation management partnerships.
- **Shetland Amenity Trust (SAT)** is a community development charitable trust, established to support preservation of Shetland's cultural and natural heritage. SAT were heavily involved with previous proposals, and were lead partners in a HLF bid for the establishment of a visitor attraction at Halligarth.
- **Unst Heritage Trust (UHT)** is a charitable Trust that manages Unst Heritage Centre (where National Trust for Scotland interpretation has previously been displayed, and events held) and Unst Boat Haven. UHT benefits from considerable local volunteer support, and could be approached to establish partnerships for interpretation, events programming and promotion.
- **Unst Partnership Ltd (UP)** is a limited company with charitable status, established to promote the regeneration of Unst. The partnership has a focus on promoting development, tourism, industry and education on Unst, and could be approached to establish partnerships for events programming and promotion. The partnership has worked with the Trust on previous proposals, contributing to an options appraisal for Halligarth, and facilitating community engagement.
- **Tenants of land on Unst & Yell.** As noted in appendix 1, a number of sites cared for by the Trust are tenanted, with many subject to grazing agreements. As noted in 6.3.1, working in partnership with tenants through grazing agreements is key to successful management of natural heritage.

9.2 Funding opportunities

The following potential funding opportunities have been identified during the development of this vision and masterplan:

- **The Historic Environment Scotland (HES) repair grant** is a grant programme to support repairs to historic buildings, which could be used to support conservation works to Halligarth House.
- **The NatureScot (NS) Peatland Action Fund** could be used to fully fund peatland restoration.
- **Trust restricted and reserve funds.**

10.0 Consultation stakeholders and advisors

The following initial list of potential stakeholders and critical advisors has been identified during the development of this vision and masterplan. All the potential partners identified in section 11.1 may also have a role as stakeholders.

- **National Museum of Scotland (NMS)**
- **The Executors of the Estate of Miss I.D.J Sandison.**

