

# RURAL ESTATES



## Our Vision.....

A fresh approach to estates to enhance value, performance and enjoyment of your property, cost effective management and innovation supported by our wide range of specialist skills. We provide bespoke integrated solutions for our clients.





## About Us

With roots dating back to 1782, Sworders recognise the variety and complexity of rural land ownership and the wide range of demands and desires of our clients. These create challenges, risks and opportunities that need to be resolved.

We are well equipped to advise on single issues facing a client, be it a planning or development opportunity, an environmental enhancement scheme, restoration of historic properties, sales, lettings, valuations and provide the full range of professional services.

However, many clients welcome and benefit from our farm and estate appraisals, an overview that results in an estate enterprise plan.

Of prime importance are the clients' objectives. Most landowners wish to achieve a balance between long term preservation of their estate with its heritage, landscape and traditions being protected and enhanced; their role in the community providing housing, employment, recreation and social cohesion; and commercial success required to meet these objectives and provide sustainable income for the future.

Sworders introduce simple measures, training and business support to reduce costs so owners and employees have the ability to improve performance to meet their objectives, be it farming, forestry, let properties, historic landscape, so the estate is in the best possible order for now and the future.

# SYNERGY

# SUSTAINABILITY

# SUCCESS

Sworders review every aspect of your property, our wide experience has often discovered new opportunities and provided innovative solutions for future success.

 <p>Diversification and Leisure</p>		 <p>Conservation &amp; Restoration of Historic Properties &amp; Landscape</p>		 <p>Estate and Property Management</p>	
	 <p>Property Disposals and Acquisitions</p>		 <p>Sales &amp; Lettings Appraisal and Valuations</p>		 <p>Heritage Management</p>
 <p>Development and Strategic Planning</p>		 <p>Planning Applications</p>		 <p>Environmental Schemes</p>	
	 <p>Whole Estate Enterprise Plans</p>		 <p>Landlord and Tenant</p>		 <p>Renewables</p>

## ESTATE TRADITIONS AND NEW IDEAS

A common conundrum for our clients is how to develop their estates, grasping the opportunities presented by changes in legislation, technology, public demand and grant funding whilst respecting the built and natural heritage that makes their properties so special.

Sworders has considerable experience in the change of use of historic buildings, including refurbishment and repairs of listed buildings, taking a common sense, practical and problem solving approach whilst using quality craftsmen. We provide advice on opening properties and managing public access whilst protecting the fabric and character.

Our role often extends to both designed and natural landscapes. Preparation of Heritage Management Plans ensures the ongoing replacement of trees, restoring and improving infrastructure as well as managing veteran trees and landscape features. Many estates include highly sensitive natural habitats, often designated, where knowledge of grant schemes and other sources of funding can help finance both management and enhancement of the environment.

These unique properties come with an attendant maintenance cost, which is where commercial awareness is critical. Explaining the need for funding to local planning authorities can be the key to realising sensitive development to raise funds, be that renewables, new commercial or leisure ventures to be run by the client, a greenfield development or conversion of buildings for sale.

Advisors tend to overlook that the property is often the family home and throughout we ensure that proposals respect the enjoyment and amenity of those who live there. We relish the opportunity to help owners oversee the evolution of these special places and ensure that their estate thrives and provides enjoyment for future generations.



# FARMS AND ESTATES....A FRESH LOOK

An overview of every aspect of an estate or farm business is invaluable. More often than not those managing the Estate (including resident agents, accountants, tax specialists and solicitors) rarely get to see the whole picture, or they are consulted on a specific matter too late in the process so decisions are made that eliminate potential opportunities and may result in unforeseen consequences.



## Estate and Whole Farm Appraisals

A whole estate or farm appraisal completed by a variety of consultants with appropriate specialisms sounds like a very expensive exercise given the charge out rates of Chartered Surveyors, Valuers, Planners, Accountants and Solicitors. Sworders have a refreshing approach by assisting clients with a holistic, cost effective approach to undertaking farm and rural enterprise plans.

# RURAL ENTERPRISE PLANS

The concept of a rural enterprise plan (REP) is to obtain higher quality and swifter decisions on development, restoration or environmental proposals. These plans smooth the planning process, give wider access to markets and Government funding. Rural businesses produce a multitude of goods and services; supporting a huge variety of different enterprises and employment.

Long term sustainability of these businesses depends on the local areas and delivering the needs of local people. A REP will have a positive outcome on future viability and sustainability of a farm or estate. The plan should set out a vision for the future and how land and buildings can be put to best use over time, identifying strategic and viable opportunities, ie tourism, leisure, residential, combined with land or buildings worthy of special protection.

These plans are usually put in place when there is new ownership or management, when a fresh pair of eyes reassess the core business strategy, but are beneficial at any time and best reviewed regularly.

Client objectives are the most important part of any appraisal. However, these will not limit our exploration of other potential opportunities, which may have been overlooked.





## THE PUBLIC VIEW

Whilst as advisors we have a detailed understanding of the contribution of the estate towards the prosperity and wellbeing of the locality, that appreciation is often not shared by either the local community or stakeholders and decision makers.

Providing some basic background information can often have a dramatic effect on the perception of estates as integrated businesses more often than not with strong social agendas. Examples of the role of estates include;

**Housing** – how many people live on the estate? Is some of that housing rent free or subsidised? Has the estate provided land for affordable housing?

**Employment** – how many jobs are accommodated on the estate, be that directly

employed, employed by businesses located within estate premises (including farms) or through associated trades (maintenance contractors, forestry contractors etc)?

**Leisure and Community facilities** – many estates provide sports fields, village halls, permissive access routes, community orchards, often again on concessionary rents or free. Community benefit includes education – providing school premises, forest schools and higher education research resources

**Landscape** – whilst more difficult to quantify, landscapes provide the backdrop to the rural environment, be they designed or natural. Both require more maintenance than is generally understood.

**Environmental benefits** – with many local authorities declaring a climate emergency,

the role of estates in carbon sequestration, carbon offsetting and maintaining and enhancing natural capital often goes unrecognised.

**Heritage** – Estates lead the field in preserving, enhancing and providing access to our heritage. This is often simply assumed, with little regard for the attendant cost and how that funding needs to be generated.

As advisors it is our role to manage and promote this message, providing context to the public, stakeholders and decision makers for the management and development decisions our clients make. That engagement strategy will differ from estate to estate depending on individual agendas, however preparation of a simple fact sheet ensures both client and advisors are well prepared to portray the business in the best light.



## LAND PROMOTION

Sworders only act for Landowners, thus assuring our clients that our specialist advice is entirely impartial.

The majority of farms and estates are not engaged with the Local Plan processes, let alone follow the frequent changes to national planning policies. Furthermore, in a climate of political and economic uncertainty, employing a firm of planning consultants to provide a strategic review of estate opportunities, may not be considered to be a priority.

A few landowners happen to have land in the right place at the right time and will, be approached by a land promoter or developer. In other cases, landowners are approached by agents retained by developers to find sites.

However, Sworders are willing to offer beneficial terms to advise on land long before it becomes of interest to promoters and developers.

We have identified and advised on many sites across a number of districts that would benefit from planning opportunities, we promote these sites through the local plan process. This can vary from individual plots through village expansion, large housing schemes to new towns and even a city!



Sworders can increase the chances of the local planning authority bringing forward a policy in your local area by getting involved in the process from the outset. Indeed, some of our most successful land promotions have commenced before the first formal public consultation stage of some Local Plan reviews.

We have secured housing allocations on a number of sites in recent years that have collectively added several hundred million pounds' worth of value many on entirely 'no win, no fee' terms with a client instruction before the Local Plan review even commenced.

## DIVERSIFICATION

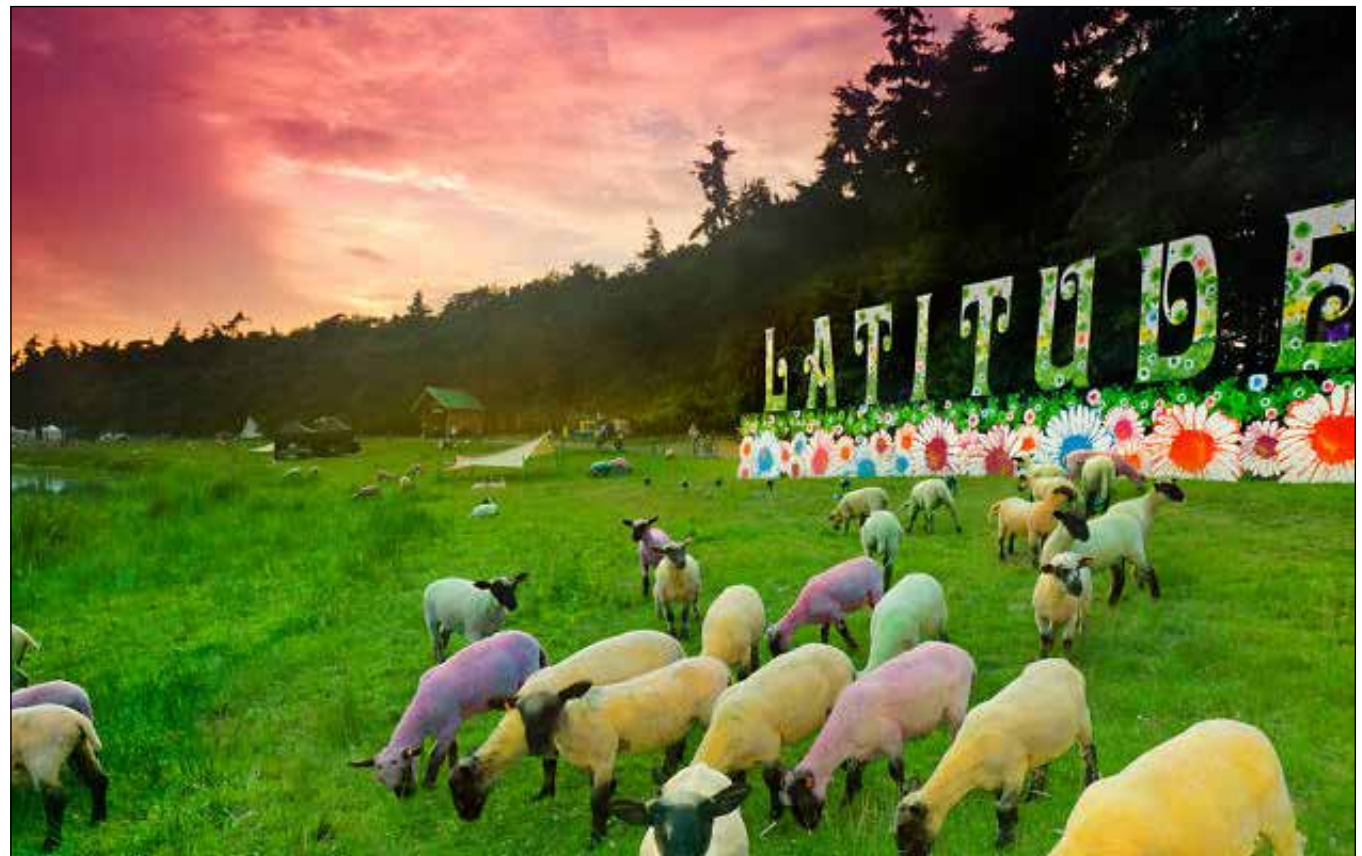
Many Estate owners see themselves as a custodian for the next generation and diversifying income streams away from reliance on agriculture, forestry and existing portfolio property rents can be an essential part of a strategy that allows each generation to be able to pass on the Estate in a stronger financial position than the one they inherited.

Sworders have assisted hundreds of clients over several decades in planning and implementing diversification projects, including commercial and residential development of old buildings, tourism and leisure facilities, sports and recreation, wildlife and environmental mitigation sites and adding value, promoting local produce.

The increasing pressure for changes in land management, carbon offsetting, the need for long term sustainability and changing perceptions of agriculture and the environment offer new opportunities for landowners and farmers.

Latitude is a good example of diversification on a grand scale and since it started in 2006 has become one of the UK's most popular festivals. The credit for securing this new business goes to the Rous family who own the venue Henham Park in the hub of the Henham Estate and Hektor Rous who has been the custodian of Henham since 2004.

However, if it were not for Sworders' original advice to the Rous family, Latitude may not exist today. The family were intending to sell the estate and Sworders were one of a number of agents given the opportunity to pitch to handle the sale. Within our appraisal we highlighted some potential diversification opportunities to the owners as an alternative to sale and by further exploration of these, they decided on reflection to retain the estate and Latitude was born.



# The Team

Our Estates' team all excel in their specialised fields and are supported by our Planning and Architectural teams.



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