



Historic England

# Managing Local Authority Heritage Assets

Advice for Local Government



# Summary

The guidance is primarily aimed at local authority asset managers and is intended to raise the profile of heritage assets and to provide a framework of ‘best practice’ for their care. It is pragmatic and practical guidance which local authorities can use as they see fit and integrate into their own management arrangements. It contains a set of ‘tool kits’ which local authorities are encouraged to modify and use to suit their local circumstances. The changing nature of local government and the resource pressures it is facing means that the management and treatment of heritage assets will require more innovative approaches – both to safeguard them for the future and to bring them into productive use. The guidance emphasises the need to think broadly and creatively about the options for heritage assets by illustrating what is possible through reference to case studies.

This guidance note has been written and developed by NPS Property Consultants Ltd (NPS)  
<http://www.nps.co.uk/>

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[HistoricEngland.org.uk/advice/planning/local-heritage/local-authority-resources/](http://HistoricEngland.org.uk/advice/planning/local-heritage/local-authority-resources/)

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## Front cover:

Hull City Hall: Hull City Council’s programme of reducing the number of its operational buildings has seen them bring a nationally important historic warehouse back into use for council staff. (See the Hull City Council case study on page 25).

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# Introduction

Local authorities own a rich and diverse set of heritage assets. These assets are important in creating the uniqueness that make our communities vibrant places in which to live, work and play. However, these assets can sometimes be seen as liabilities, inflexible in terms of use and costly to maintain – particularly when resources are scarce and when there is pressure to view assets in terms of their performance (utilisation, cost and commerciality etc). Local authority asset managers have a responsibility to ensure that heritage assets receive a strong management focus in order that the benefits they can provide are realised.

The changing nature of local government and the resource pressures it is facing means that the management and treatment of heritage assets will require more innovative approaches – both to safeguard them for the future and to bring them into productive use. This advice is written for local authority asset managers in order to raise the profile of heritage assets, to provide a framework of ‘best practice’, and to demonstrate through the use of case studies what is possible. It is intended to be pragmatic and practical guidance which local authorities can use as they see fit to integrate into their own management arrangements. It contains a set of practical ‘tool kits’ which local authorities are encouraged to modify and use to suit their local circumstances.

# 1 The Importance of Heritage

## 1.1 Definition

A heritage asset is defined by the [National Planning Policy Framework](#) as being:

*“a building, monument, site, place, area or landscape identified as having a degree of significance meriting consideration in planning decisions, because of its heritage interest. Heritage assets include designated heritage assets and assets identified by the local planning authority (including local listing).”*

There are a number of categories of designated heritage assets used in England:

- World Heritage Sites
- Scheduled Monuments
- Listed Buildings
- Protected Wreck Sites
- Registered Parks and Gardens
- Registered Battlefields
- Conservation Areas

In some areas, local planning authorities have also created ‘local lists’ of non-designated heritage assets. Under [Planning Practice Guidance](#):

*“Local planning authorities may identify non-designated heritage assets. These are buildings, monuments, sites, places, areas or landscape identified as having a degree of significance meriting consideration in planning decisions, but are not formally designated heritage assets”*

For this advice the widest interpretation of heritage assets has been adopted including both designated and non-designated assets.

## 1.2 Why heritage matters

Heritage assets play an important role in terms of our prosperity, our health, our education and our civic pride. For these reasons alone they deserve a critical focus of attention.

The value and impact of heritage assets is highlighted in the annual publication of Heritage Counts (published by Historic England on behalf of the Historic Environment Forum).

[Heritage Counts](#) has shown that 87% of people believe that better quality buildings and public spaces improve quality of life; 90% believe that investment in the historic environment make their area a better place; and 92% believe that investment in historic-led regeneration raised pride in their area.



## Why heritage is important

Heritage is important for a variety of reasons, including:

### **Sense of place**

heritage provides the unique character that helps to make communities distinctive

### **Economic prosperity**

heritage attracts visitors and these in turn help to bring wealth and prosperity to an area

### **Regeneration**

heritage can support the revitalisation of deprived areas through their character, location and use

### **Civic pride**

heritage contributes to a sense of pride. The legacy of the past reinforces our history and this sense of pride

### **Sustainability**

physical life of heritage assets is often greater than their functional life - bringing them back into use is an effective use of resources

### **Education**

opportunities to access and understand heritage can have a positive impact on learning and attainment

### **Leisure and tourism**

heritage can provide a focus for leisure activities from simply visiting and enjoying a place to providing a focus for detailed research and interpretation

### **Health and well-being**

exploring heritage helps people in maintaining a healthy physical life-style and can help reduce stress and mental health issues

been acquired for a variety of reasons over a long time; but particularly associated with the growth of local government during the late nineteenth and early twentieth centuries when the number of councils and range of functions undertaken grew, necessitating new types of buildings. They range from iconic buildings of national interest to locally significant buildings used in the provision of community services and parks and gardens.

Councils have an important role in the management of these heritage assets. As owners and users of heritage assets they face the cost, conservation and suitability issues such buildings can present. In their leadership role as representatives of community interests they have a responsibility to set an example to other bodies and individuals who own heritage assets. In some cases local authority owned heritage assets, especially those with civic significance such as town halls, can have very strong links to a geographical community and also be a physical manifestation of the council in the community. In their multi-faceted community role as a 'regulator', 'leader', 'funder', 'facilitator' and 'service provider' local authorities have an important role with regard to heritage assets.

## Local authority roles with respect to heritage assets:

- as a landowner with responsibility for many historic buildings and places
- as a regulator (planning authority) and provider of incentives for the protection of heritage assets in private ownerships
- as a facilitator for growth and development
- as a funder of major capital works
- as an advocate for heritage and in promoting the profile and awareness of the benefits of heritage
- in its leadership role representing community interests

## 1.3 Local authority responsibilities

Local authorities collectively own or occupy a large number of heritage assets. These have

## 1.4 Current operating context for local government

Local government is re-inventing itself with the whole process of democracy, accountability and service delivery changing. This process of change is partly driven by, and set within, the context of constrained public finances. Whilst the pace and detailed nature of this change is hard to predict some key themes seem evident. These are the increasing emphasis on partnership working (between public bodies and the public and private

sectors); the need to optimise the use of scarce resources; and a focus on regeneration - creating vibrant and self-sustaining communities. These themes all have a direct impact on the way local government manages its heritage assets. There is a need to ensure the capital tied up in heritage assets is put to productive use where possible; that any potential liabilities from poor maintenance are kept to a minimum; and that care is taken to resolve the potential ambiguity between a 'stewardship role' for heritage assets and a need for a culture of 'public entrepreneurialism'.



# 2 Framework for Managing Heritage Assets

Managing heritage assets involves a range of related activities. These are shown in simple terms in the framework.



This framework is used as the basis for the subsequent guidance in this document and is amplified in a ‘best practice’ template.



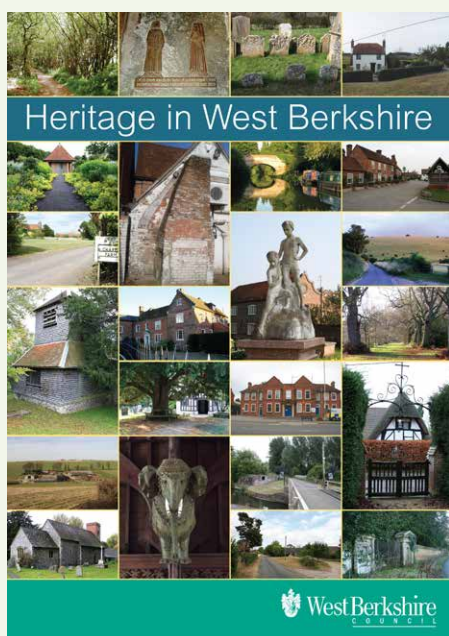
Heritage Assets ‘Best Practice’ Template providing a simple structure for thinking about how to manage heritage assets.

# 3 Identify

## 3.1 Understanding what you own

It is important to identify and understand what assets the council owns. It is essential to have comprehensive and up-to-date information on

the extent, nature and condition of heritage assets. The basic requirement is to establish a register of heritage assets (this need not be a separate system but could be part of a wider property management system).



### Case study: Heritage in West Berkshire

On the initiative of the [Heritage Champion](#), West Berkshire Council produced a document to raise the profile of heritage assets in the area and through this promote their conservation.

[www.westberks.gov.uk/heritagereport](http://www.westberks.gov.uk/heritagereport)

As well as providing a comprehensive list of the designated heritage assets in the unitary authority, the report collated a directory of local history and archaeological societies as a way of encouraging active engagement in conservation matters. Information about the historic environment of each parish was generated from the HER (Historic Environment Record) and sent to many community groups and parish councils in the form of parish packs.

Table of designated heritage assets by West Berkshire parish 2015

Parish	World Cultural Heritage	World Scheduled Monuments	Rest of Scheduled Sites and Landmarks	Rest of Registered Landmarks	Rest of Registered Parks	Rest of Listed Landmarks	Rest of Listed or Scheduled Parks
Abingdon	50	3	1	0	2	1	0
Abingdon	18	2	0	0	1	0	1
Abingdon	23	0	0	0	1	0	0
Abingdon	65	1	1	0	1	0	0
Beech Hill	14	0	0	0	0	0	0
Bendon	18	1	0	0	0	0	1
Berkeley	27	0	0	0	1	0	0
Boxford	50	1	0	0	1	0	1
Bradfield	41	0	0	0	1	0	0
Brightwell	16	0	0	0	3	0	0
Brimpton	20	5	0	0	2	0	0
Buckbury	62	0	0	0	1	0	0
Burghead	14	1	0	0	1	0	0
Calton	1	0	0	0	0	0	0
Chadwell	33	1	0	0	1	0	0
Chilwell	26	1	0	0	1	1	0
Cold Ash	10	0	0	0	0	0	0
Combe	14	2	0	0	0	0	0
Compton	12	1	0	0	1	0	2
East Garston	36	0	0	0	1	0	0
East Hinton	27	3	0	0	1	0	1
Easton	15	0	1	1	0	0	0
Englefield	19	0	1	0	1	0	0
Farnborough	9	0	0	0	1	0	0
Fawley	4	2	0	0	0	0	0
Fretham	4	0	0	0	1	0	0
Great Shefford	29	1	0	0	1	0	1
Greenham	15	1	1	0	2	0	0
Hampstead Norris	31	1	0	0	1	0	1
Hamstead Marshall	27	3	1	0	1	0	0
Hamstead	7	1	0	0	0	0	0
Holybrook	7	0	0	0	0	0	0

The document referenced some key sources, council archaeology and conservation services, important assets and collections and the Historic Environment Action Plan (HEAP) of the West Berkshire Heritage Forum.

**Top:** *Heritage in West Berkshire Report.*

**Bottom:** An extract from the report which identifies the number of designated heritage assets in West Berkshire.

## 3.2 Heritage asset data

For many local authorities data on property assets is stored and updated electronically. This data needs to be updated regularly in order to support effective day-to-day management of all assets, including those of heritage significance. The lack of information on heritage assets can act as a barrier to their effective management. However, understanding what data is required can be problematic and gathering and maintaining data can also be resource intensive. The heritage asset data template provides an illustration of what data can be held – this can be used as a starting point to inform the collection priorities for individual councils.

The heritage asset data template is a simple framework which can be modified to meet individual council needs. As a minimum any statutory designations (whether they are listed, scheduled, within a conservation area, or protected by any other form of heritage designation) would be expected to be known. A key requirement is

where and how this data is held and the recommendation is for heritage assets to be considered as a sub-set of the wider portfolio of assets that a council may own and for data to be held in any corporate systems that a council may use to manage these.

With continuing changes in organisational arrangements within councils it is important to ensure that a cumulative record of each heritage asset (including reports, plans, drawings and photographs) is retained and made readily accessible; with arrangements in place to update records as works are undertaken.

There is a wealth of information on archaeology and the historic built environment held within a national network of local Historic Environment Records (HERs). HERs are a primary source of information for planning, development-control work, and land management. More information on HERs can be found at:

[www.HistoricEngland.org.uk](http://www.HistoricEngland.org.uk)

### Data needs for heritage assets

A wide range of data is needed to fully describe heritage assets. However, there is a basic set of data that local authorities can have to support effective asset management. The template below provides an initial list of data requirements to inform data collection priorities.

Identification and location	Core data	Heritage significance	Management action
<b>About the asset</b>	Tenure	Categorisation of asset	History of previous action
Name of asset and address	Area	Grade (heritage designation)	
UPRN (unique property reference number) and Historic Environment Record number	Occupation and current use	Within a conservation area	
Spatial identifier	Value (asset and insurance), cost and income	Physical description	
Site / location plan	Condition	Statement of heritage significance	
<b>About the locality</b>	Suitability (fitness for purpose)	Is the asset on the 'At Risk' register?	
Description of locality (for context)	Sustainability (energy efficiency / water / whole life costs)	Description of the nature of the risks	
	Performance (running cost / utilisation etc)		
			<b>Supplementary information</b>
			Statement on 'presentation'
			Information on 'interpretation'
			Photographs
			Details of fixtures and fittings (if appropriate)
			Details of other contents (furniture or art etc) if appropriate

Heritage Assets Data Template.

# 4 Plan

## 4.1 Raising the profile of heritage

There is a need to sustain the profile of heritage so that it is a consideration in decision-making and resource allocations of the council. There are a variety of ways of achieving this. The identification of a heritage ‘champion’ at a senior member or officer level is important. Champions can ensure a consistent, coordinated approach is taken to management of heritage assets. A Heritage Champion can promote the case for heritage assets through budget and resource allocation processes, and ensure the impact of other council policies and programmes on the heritage assets are properly considered. Similarly, a senior cross-service forum within which to consider heritage issues can be a catalyst for sustaining the profile and progressing detailed heritage management issues. It may be that heritage matters could be considered as part of a pre-existing group (such as a Corporate Asset Management or Capital Programme Group); or alternatively a separate ‘Heritage’ or ‘Conservation’ forum could be established. In the latter case it will be important to have representatives at a senior level to exert some degree of influence over policy and resource-allocation. More information on Heritage Champions can be found on the [Heritage Champions webpages](#) on the Historic England website.

### What is a Heritage Champion?

A **Heritage Champion** is normally a local councillor who has been nominated by their authority to promote all aspects of the historic environment in their area. Champions can make sure that local plans and strategies capture the contribution that the local historic environment can make to the success of an area.

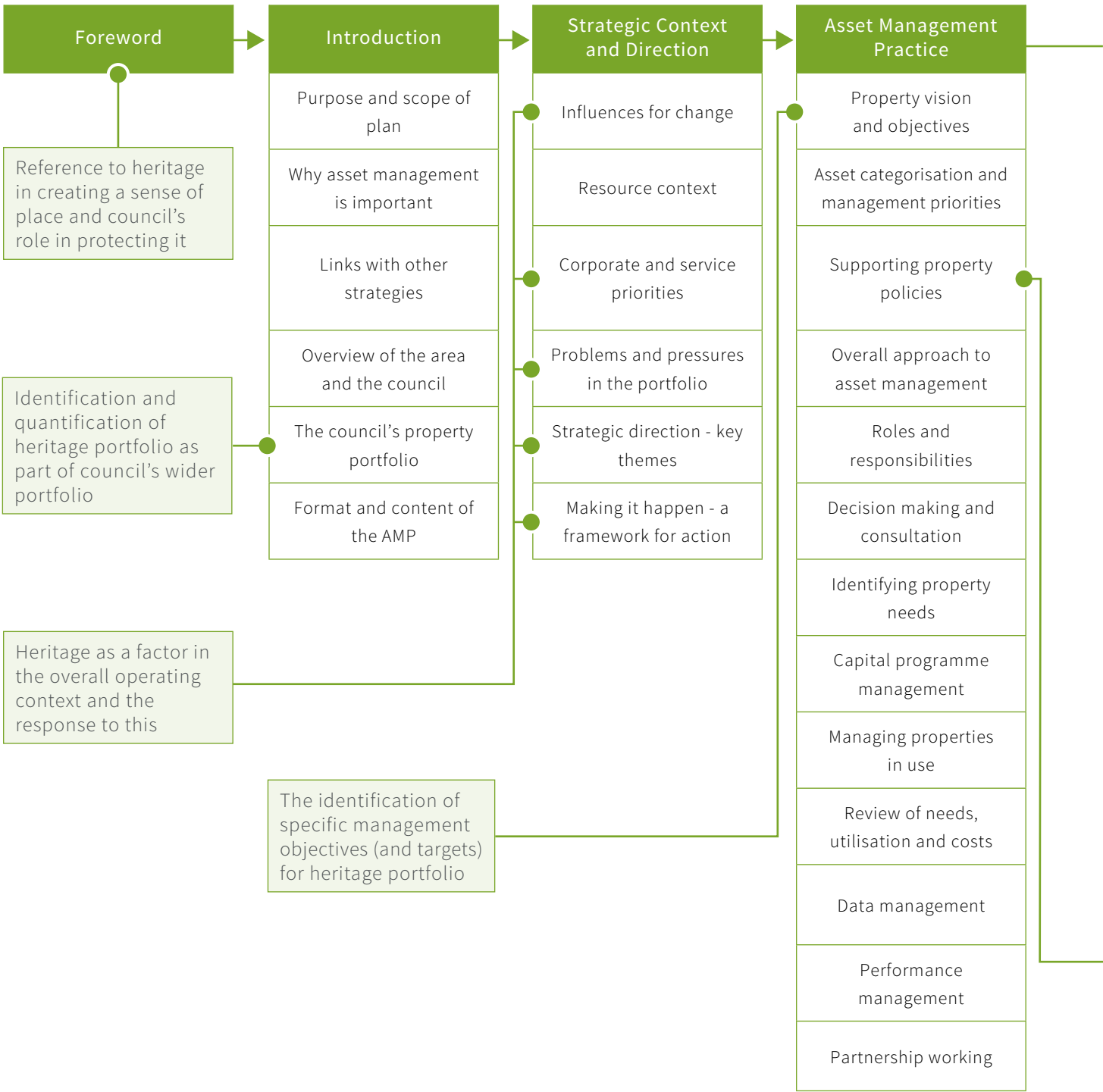
More specifically, they can:

- help local authorities manage the historic environment of their area
- promote heritage within your local authority, generating enthusiasm for and awareness of the importance of the local historic environment
- help ensure that commitment to the proper care of the historic environment is embedded in all relevant activities and plans of the local authority; for example, helping to ensure good quality planning decisions are made
- support your authority’s local historic environment services (both archaeological and historic buildings conservation officers). Influence and communicate with others to ensure benefits for the historic environment

4.2 Heritage and asset management planning

‘Best practice’ implies the need for councils to have an overall strategy for their property portfolios. These are often developed as Asset Management Plans (AMPs). These strategies need to support the Council’s wider corporate objectives and priorities and be directed to ensure that the size, nature and

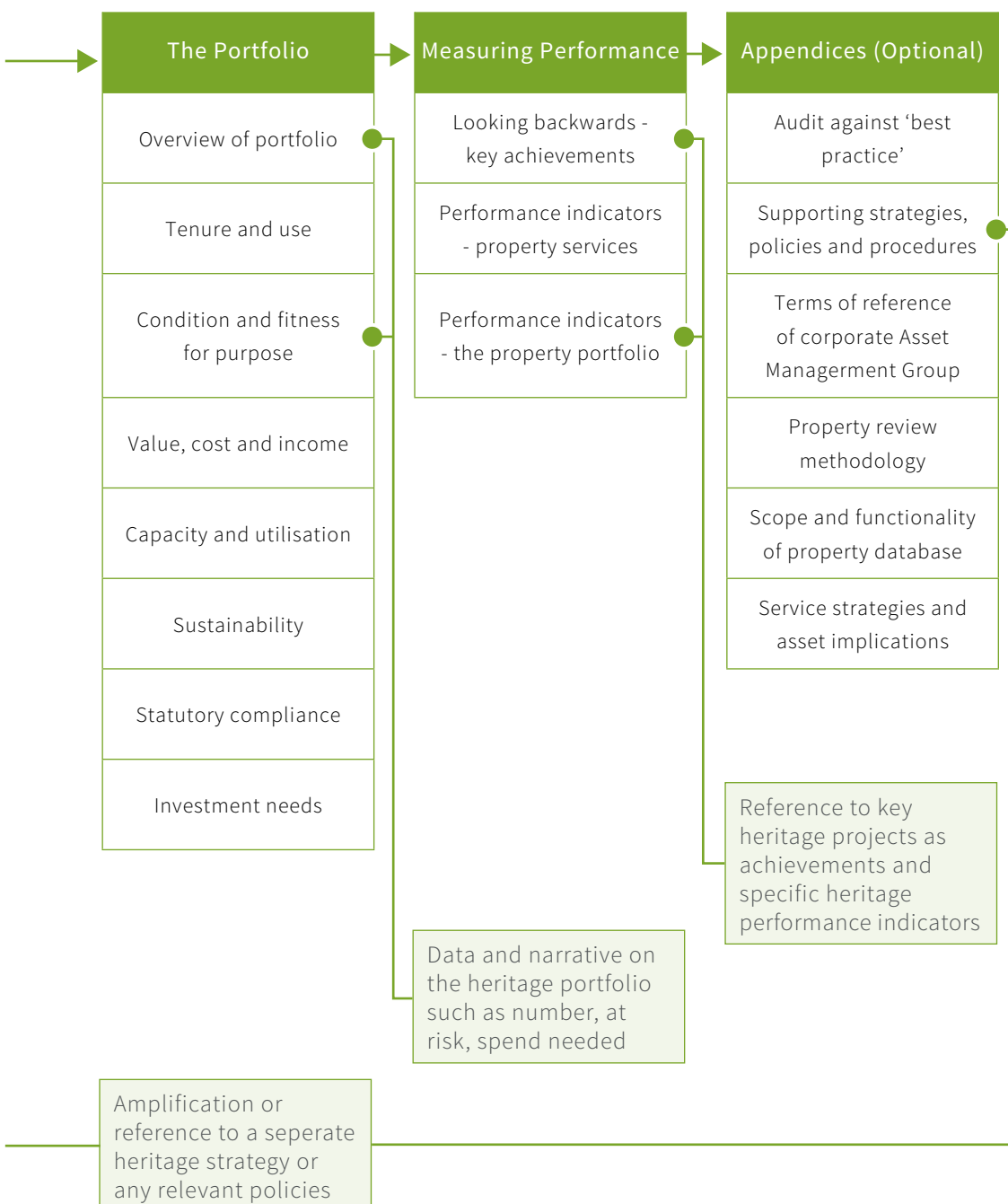
condition of the portfolio is consistent with the Council’s needs. These strategy documents will cover many property types (such as operational, administrative, investment and surplus) and it is important that heritage assets are reflected as a part of the wider portfolio through the strategy. This can be done in several ways and the Heritage in Asset Management Plan template illustrates some options to achieve this.



Heritage in Asset Management Plan Template.

## Integrating heritage into asset management plans

There is no specific format and content for an Asset Management Plan. In general it needs to be relatively short with the main body between 16 to 24 pages plus supplementary appendices. The structure below is presented as a possible approach but this can be modified to suit individual needs. This template identifies where the importance and relevance of 'heritage' can be reflected through the AMP.





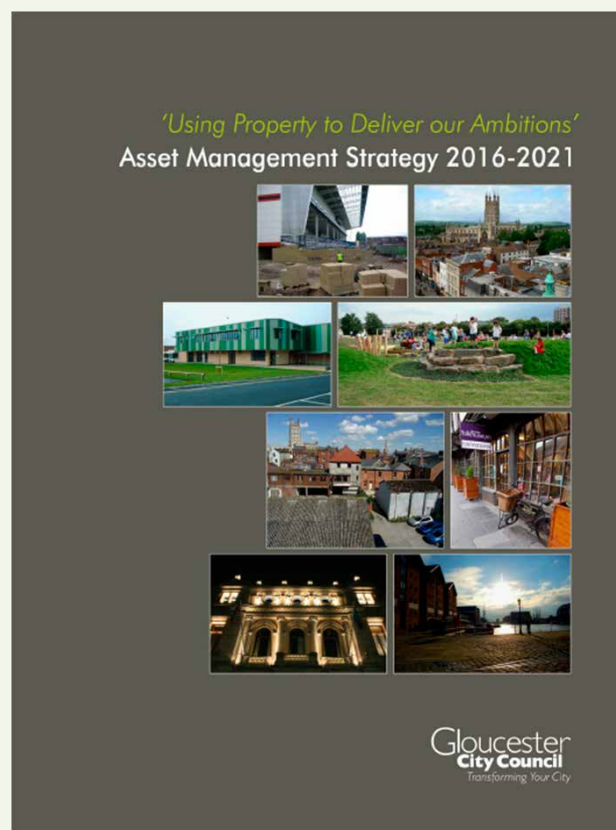
## Case Study: Gloucester City Council - including heritage in AMPs

Gloucester City Council has published its updated Asset Management Plan (AMP), *Using Property to Deliver our Ambitions - Asset Management Strategy 2016-21*. The council has categorised its portfolio by asset use or type with a separate section for each category of assets. Within these sections the Council has quantified the number of assets, provided a brief narrative to highlight key issues and identified asset management priorities. There is a separate section covering historic monuments providing a specific management focus on historic assets.

The Council acknowledges that its 39 buildings in this asset category sometimes have no commercial value or any other organisation (other than the Council) to look after them. Whilst recognising its stewardship role for these assets it also identifies the positive impact they can have on tourism and the city's profile. The AMP identifies specific actions for the historic monuments including developing an historic monuments management plan and options appraisal for future management including assets transfer in appropriate cases.

The approach taken by the Council places a specific focus on heritage assets and in doing so recognises their importance, their distinctive nature and their need for a specific

management focus. When updating AMPs or developing asset strategies councils may give consideration to how heritage assets can be reflected through these. At its simplest level the categorisation and quantification of heritage assets as a part of the AMP provides a simple approach to ensuring that they are recognised as distinctive type of asset and this is worthy of a specific management focus.



Gloucester City Council Asset Management Plan.

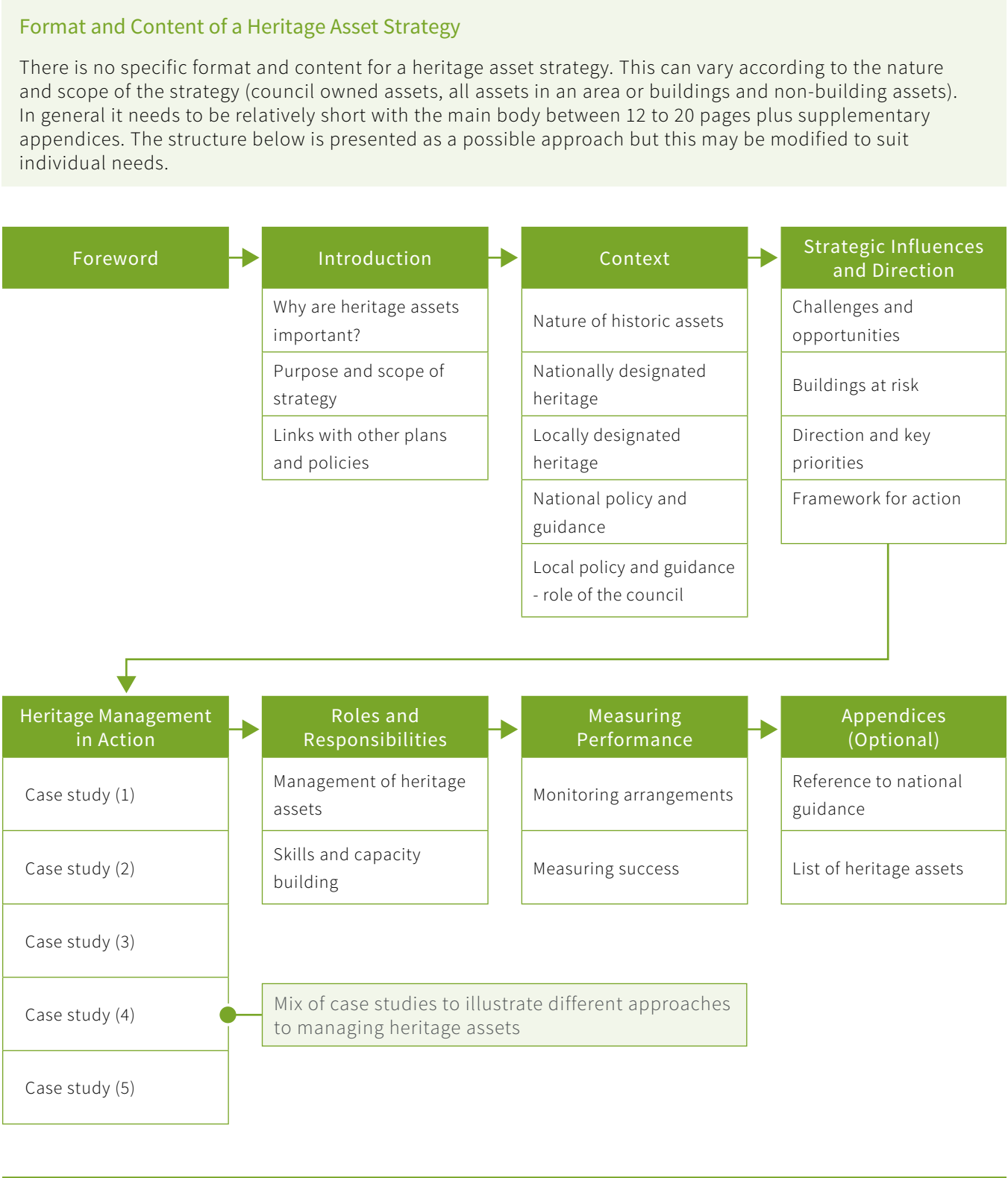
## 4.3 Developing a heritage strategy

Strategy is important. It allows councils to articulate a direction in response to changing circumstances and provides a framework around which resources and action can be coordinated. The term 'heritage strategy' can embrace a variety of documents each with a different focus. These can range from a reference to heritage

within a broader planning strategy; to one which focuses on cultural or tourism aspects; to one which is focussed specifically on heritage assets. Different councils may take different approaches; some focussing simply on a strategy for heritage assets they own with others embracing all heritage assets within their administrative areas irrespective of ownership. Different strategies will require different approaches.

It is also important that heritage assets themselves are recognised as a significant sub-portfolio within the wider portfolio and in some cases may benefit from their own dedicated heritage asset strategy. This is particularly the case where a council is rich in heritage assets. Developing a heritage asset

strategy will allow a specific focus to be placed on heritage assets; raise their profile within the organisation and set a broad direction and specific actions for their management. The Heritage Asset Strategy Template (below) provides one model for the format and content of a heritage asset strategy.



Heritage Asset Strategy Template.

The process for developing a heritage strategy is a consultative one - involving engagement with departments across the council and partner agencies external to the council. Whilst there are no specific stages to follow, the approach to developing a heritage strategy given here maybe helpful.

### Process for developing a heritage strategy

- define scope and purpose of strategy
- define the assets / heritage
- talk to partners
- consider the risks / threats
- identify the opportunities
- develop your strategic aims
- consult again
- produce an action plan  
(identify resource implications)
- define review mechanism  
(and refresh frequency)
- launch

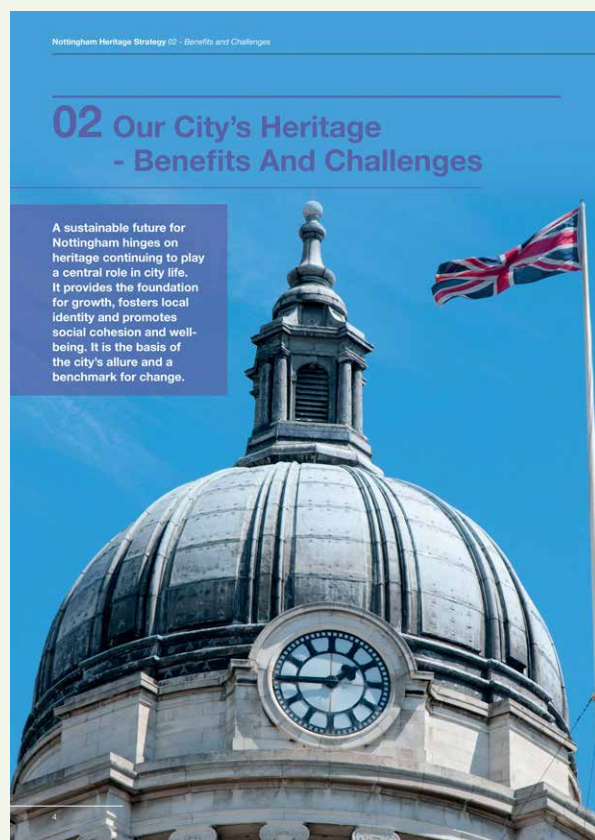
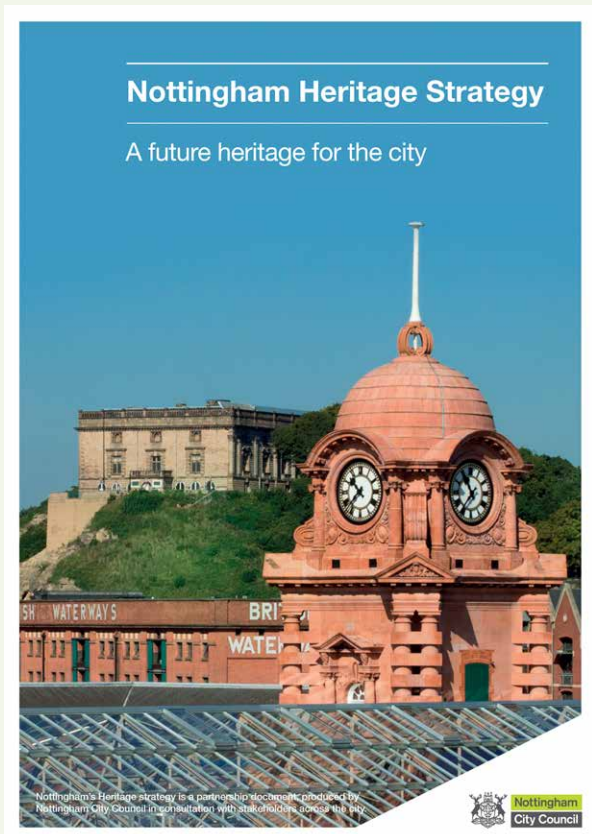
### Case Study: Nottingham City Council – Heritage Asset Strategy

Nottingham City Council has worked with partner organisations and developed a [heritage strategy](#) looking forward to 2030. The strategy is comprehensive with sections on Nottingham's Heritage; Benefits and Challenges; Working Together; A Forward Looking Framework and Governance and Delivery of the strategy.

The Forward Looking Framework articulates objectives, actions and outcomes under three key aims - understanding; capitalising and celebrating. The section on Working Together identifies the role of the Council as a leader, source of expertise, property owner and emphasises the need for a joined-up approach across partner organisations.

The section on Governance focuses on delivery and identifies a number of specific actions including establishing a panel to steer delivery of the strategy, establishing a heritage partnership, producing an annual action plan and report and creating a new dedicated post to help establish the partnership and to deliver actions.

The foreword to the strategy is endorsed by four senior councillors and emphasises the positive contribution that heritage can make to the prosperity of the city that is consistent with the strategy's vision which is to establish a vibrant, valued and widely-known heritage which delivers long term benefits to the people, economy and environment of the City of Nottingham. The strategy won the 'Excellence in Planning for Built Heritage' award from the Royal Town Planning Institute in 2016.



A series of images taken from the Nottingham City Council Heritage Asset Strategy which highlight the important contribution that the historic environment makes to modern Nottingham.



# 5 Manage

## 5.1 The basis for management

Before making any decisions about what action is needed it is important to understand the nature of heritage assets. Their significance, condition and potential provides the basis for rational decisions about their future use; whether this is to retain in existing use, to undertake alterations or to dispose.

## 5.2 Action plan

At an individual asset level, it is important to determine required or preferred action. As shown in the following section there can be a variety of choices for each asset. There are several criteria that need to be considered to determine what might be the best course of action for each asset. These include assessment of 'fitness for purpose', condition and options for future use. Whereas an overall heritage asset strategy can provide a broad direction around which to coordinate effort and resources there is also a need to identify actions for individual assets. There may be a tendency for councils to take a passive approach to managing heritage assets because of a sense of inertia about the ability to effect change. However, councils are encouraged, wherever possible, to identify actions for each individual asset.

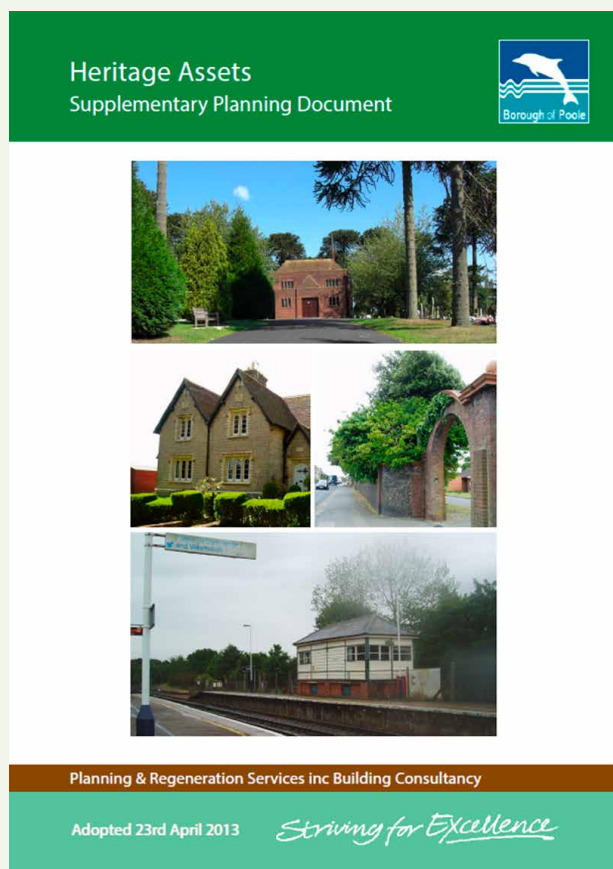
## 5.3 Maintenance

Planned maintenance and repair, based on regular condition surveys are essential for all assets. In the case of heritage assets such surveys need to be undertaken by appropriately qualified professionals and remedial works may also require traditional craft skills and non-standard materials. This has a cost implication which in the context of budget pressures may make prioritising maintenance spend on heritage assets more difficult. 'Best practice' implies a need for a visual inspection of assets annually with detailed inspections at least every five years. These inspections can be used to generate a long-term maintenance plan; with a programme of cyclical maintenance and prioritised and costed repair works.

It needs to be recognised that heritage assets may require detailed attention, more frequent maintenance and specialist advice; which also implies budgeting based on needs. It may be appropriate for guidelines for building managers to identify any differing maintenance standards required at an individual building level. Consideration can be given to determining a specific maintenance budget allocation (capital and revenue) for heritage assets so that they do not lose out in allocation processes because of the potentially higher costs associated with their specific conservation needs.

## Case Study: Poole Borough Council – Maintenance of Heritage

Poole Borough Council set out [guidance](#) on the maintenance of heritage assets in an appendix to the supplementary planning document adopted in 2013. Written for owners, it gives an outline of how to treat heritage assets, focusing on the Victorian and Edwardian buildings which are prominent in the area.



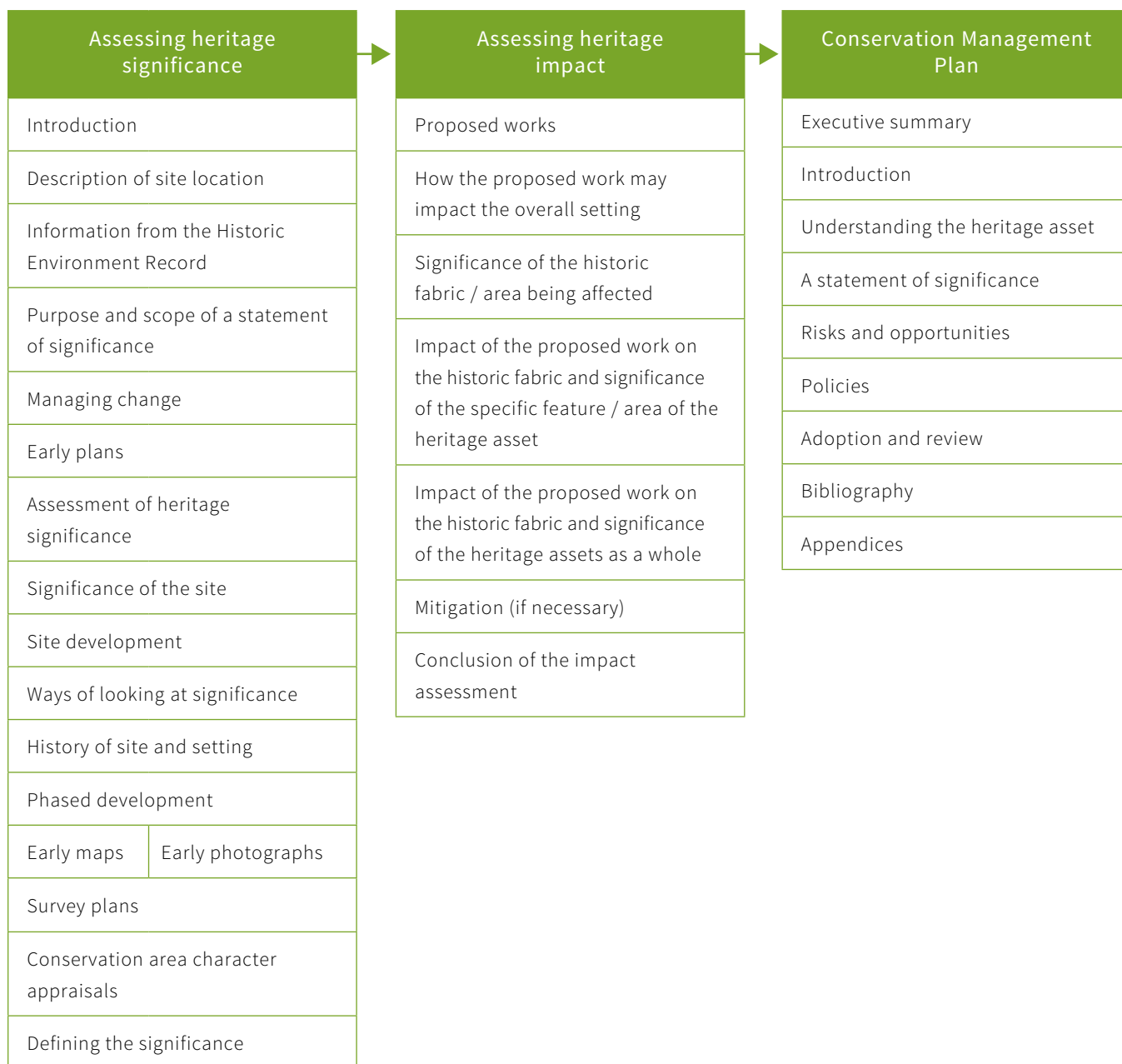
**Left:** Poole Borough Council – Supplementary Planning Document.

The guidance emphasises the fact that the best method of conserving heritage assets is to carry out regular maintenance as this prevents assets decaying to such an extent that they must be restored or demolished. Restoration to replace lost original features is often inappropriate. Frequent minor repairs to conserve the original fabric are the most economic option in maintaining heritage assets. The guidance emphasises that where repair works are unavoidable, traditional materials and methods can be used to maintain the integrity of the asset. The guidance covers roof coverings, brick and stonework and pointing. Effective maintenance requires both the right skills and the right materials. An understanding of what materials were used and how is important as these are at the heart of a building's story. Materials used in historic buildings often have a relative softness that contrasts with those in modern construction. These 'soft' materials can perform well over long periods; provided they are protected from excessive moisture and are allowed to breathe through proper maintenance. 'Breathing', in this context means allowing moisture to evaporate from or through a wall. Modern materials including paints and cement-based materials can harm old buildings by trapping moisture and thus preventing the natural evaporation process. It is important therefore that craftsmen experienced in using traditional materials are used to undertake repairs to historic assets in order to avoid such damage. The subject of materials and their use in conserving and repairing historic buildings is wide in scope and outside the remit of this advice. However comprehensive guidance is available from [Historic England](#) and other conservation bodies.

## 5.4 Conservation

It is vital to understand what makes a heritage asset important as this knowledge will help to inform and direct any decisions or work affecting the asset. There are a variety of tools

that can help in this regard and these are summarised briefly below. Where capacity and expertise are not available in-house commissioning the preparation of these statements by a professional with appropriate heritage expertise is an option.



Heritage Assets Conservation Needs Template.



## ■ Assessing heritage significance

Assessing the heritage significance is a requirement of the National Planning Policy Framework (NPPF) which states: “Local planning authorities should require an applicant to describe the significance of any heritage assets affected including any contribution made by their setting”. Such statements of significance can be submitted with any application for planning permission within designated conservation areas, registered historic parks or gardens; or affecting known archaeological sites and also with applications for Listed Building Consent. The statement could contain sufficient detail to assess the history and character of the building and justify proposed works in terms of their impact on the heritage asset. An assessment of significance can demonstrate an understanding of the fabric and evolution of an asset. Statements can be prepared by an appropriate professional with necessary expertise to properly assess the heritage asset and its significance.

## ■ Assessing heritage impact

An impact assessment looks at the statement of significance and reviews where works are being proposed; what the impact will be on the specific features or areas of the heritage asset as well as the impact on the assets as a whole. The impact assessment can include any mitigation arguments that can be made in support of the proposals. The impact assessment could be linked to the National Planning Policy Framework Guidance and [Conservation Principles, Policies and Guidance For the Sustainable Management of the Historic Environment](#).




## ■ Conservation Management Plan

A Conservation Management Plan is a broader document setting out an understanding of the Statement of Significance, risks and opportunities and future policies. It is usually a document that sets out how to sustain significance through any new use, alteration, repair or management. It is also useful if it includes a programme of works to maintain the building in good order.

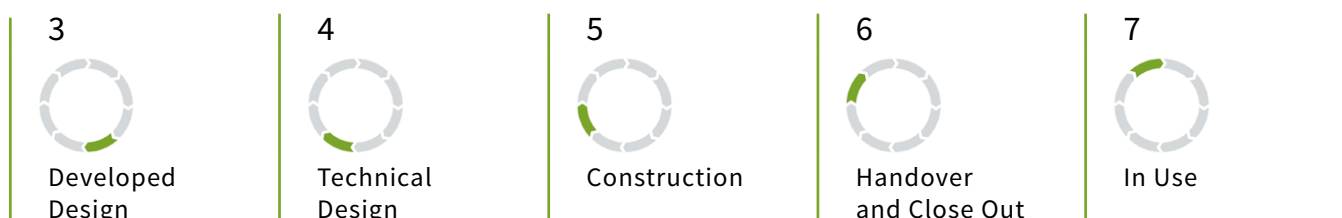
## 5.5 The need for expertise

Working with heritage assets requires specialist skills and expertise. These are important at both a craft and professional level. These skills may not be available within councils; especially smaller councils, and there may be a need to access specialist professionals and contractors. Without specialist input, actions may be developed and implemented without a full understanding of the management needs of heritage assets and works may be undertaken that are detrimental to the asset rather than conserving it. The need for specialist heritage skills and ongoing dialogue with other bodies, such as Historic England, is paramount for all stages. Whilst it is acknowledged that having such expertise in-house is not necessarily a viable option for many authorities there is a need to ensure access to specialist consultants and contractors either through well-defined framework agreements or in partnerships between authorities.

Early and ongoing engagement with local authority in-house conservation professionals where these exist is vital. This allows a wider perspective to be taken on the management of heritage assets. Rather than simply being considered from a narrow property or financial viewpoint this will allow consideration of a building’s ‘optimum viable use’. The conservation officer’s role is to ensure the heritage assets of the local authority are preserved, managed, enhanced and promoted. Typically, a conservation officer will offer pre-application advice for development proposals; assess how planning applications may affect heritage assets; agree inspection cycles; carry out surveys and assist in enforcement action. The role can also include advising on heritage policy, sourcing grants and other funding for conservation work and championing heritage issues with the local authority and wider community.

		0  <b>Strategic Definition</b>	1  <b>Preparation and Brief</b>	2  <b>Concept Design</b>
Core Services	Brief	Assist the client and Design Team to understand conservation and heritage impact on business case and the strategic brief	Assist the client and Design Team to understand conservation and heritage impact on the preparation of the initial brief	Assist the client and design team refine the project strategies in line with conservation and heritage best practice
	Archaeology		Advise on the need for archaeology input	Advise on the need for archaeology input
	Specification		Assist in preparation of specification of works	Assist in preparation of specification of works. Advise on appropriate materials
	Designer's Risk Assessment			Input into lead designer's risk assessment
	Site		Visit site to assess opportunities and constraints. Visit site to establish initial thoughts on condition	Assess concept design against opportunities and constraints / design parameters. Identify scope of works for repairs / interventions
Reports	Conservation Management Plan		Identification and review of existing conservation management plan	Commissioning or start preparation of conservation management plan
	Heritage Statement		Identification and review of existing heritage statement	Commissioning or start preparation of heritage statement
	Statement of Significance		Identification and review of existing statement of significance	Commissioning or start preparation of statement of significance
	Historic Buildings			Commissioning or start preparation of historic buildings record
	Gazeteers			Commissioning or start preparation of gazeteers
	Quinquennial			
Procurement				
Planning			Identification of planning process	Identification and validation of requirements: commissioning of relevant information
Conservation Liaison			Identification of relevant personnel and project introductions	Initial discussions

RIBA Plan of Work and Conservation Template setting out the various stages of engagement and works to be carried out at each stage in a heritage conservation project.



Assist in preparation of specification of works. Advise on appropriate materials	Assist in preparation of specification of works. Advise on appropriate materials			
Input into lead designer's risk assessment	Input into lead designer's risk assessment			
Visit site to help assess developed design against opportunities and constraints		Visit site to review specialist works. Assist project lead to review progress on site and identify quality issues		
Production and issue of conservation management plan	Application of conservation management plan	Application of conservation management plan	Application of conservation management plan	Review of conservation management plan
Production and issue of heritage statement	Application of heritage statement	Application of heritage statement	Application of heritage statement	Review of heritage statement
Production and issue of statement of significance	Application of statement of significance	Application of statement of significance	Application of statement of significance	Review of statement of significance
Production and issue of historic buildings record				
Production and issue of gazeteers				
Identification of specialist sub-contractors		Appointment of specialist sub-contractors		
Coordination of materials and submission of listed building or scheduled ancient monument application	Production of information may require Stage 4 design resolution of application - negotiation of approvals and conditions	Review if works on site are in accordance with approvals	Confirmation and approvals that works completed in accordance with planning	
Pre-application negotiations	Liaison about detailed technical design proposals	Liaison about construction on site	Confirmation and approvals that works completed in accordance with conservation bodies requirements	

## 5.6 Link between conservation and asset management

The management of heritage assets necessarily involves staff with conservation responsibilities and those with asset management responsibilities. These roles will often be in different organisational departments of a council and consequently close working liaison is not always easily achieved. It is important to establish simple mechanisms for ensuring this liaison works effectively so that conservation issues are

considered as part of any asset management strategies and decision making. This can be done through for example: conservation representation on a Corporate Asset Management Group (or its equivalent); regular, planned meetings between the Head of Conservation and Head of Asset Management or informal exchanges of knowledge between the respective disciplines. Ideally liaison will be systematic and structured so that it becomes embedded as part of 'business as usual' within the overall processes for managing property assets.

# 6 Implement

## 6.1 Retain in original use

The physical life of buildings can often exceed their functional life and some heritage assets may be supporting uses for which they were not designed. This is often the case with buildings,

such as town halls, which continue to support administrative functions in an outdated physical layout, and where alternative uses are not readily identifiable. In such cases imaginative minor adjustments with modest investment may allow them to continue in their current use.

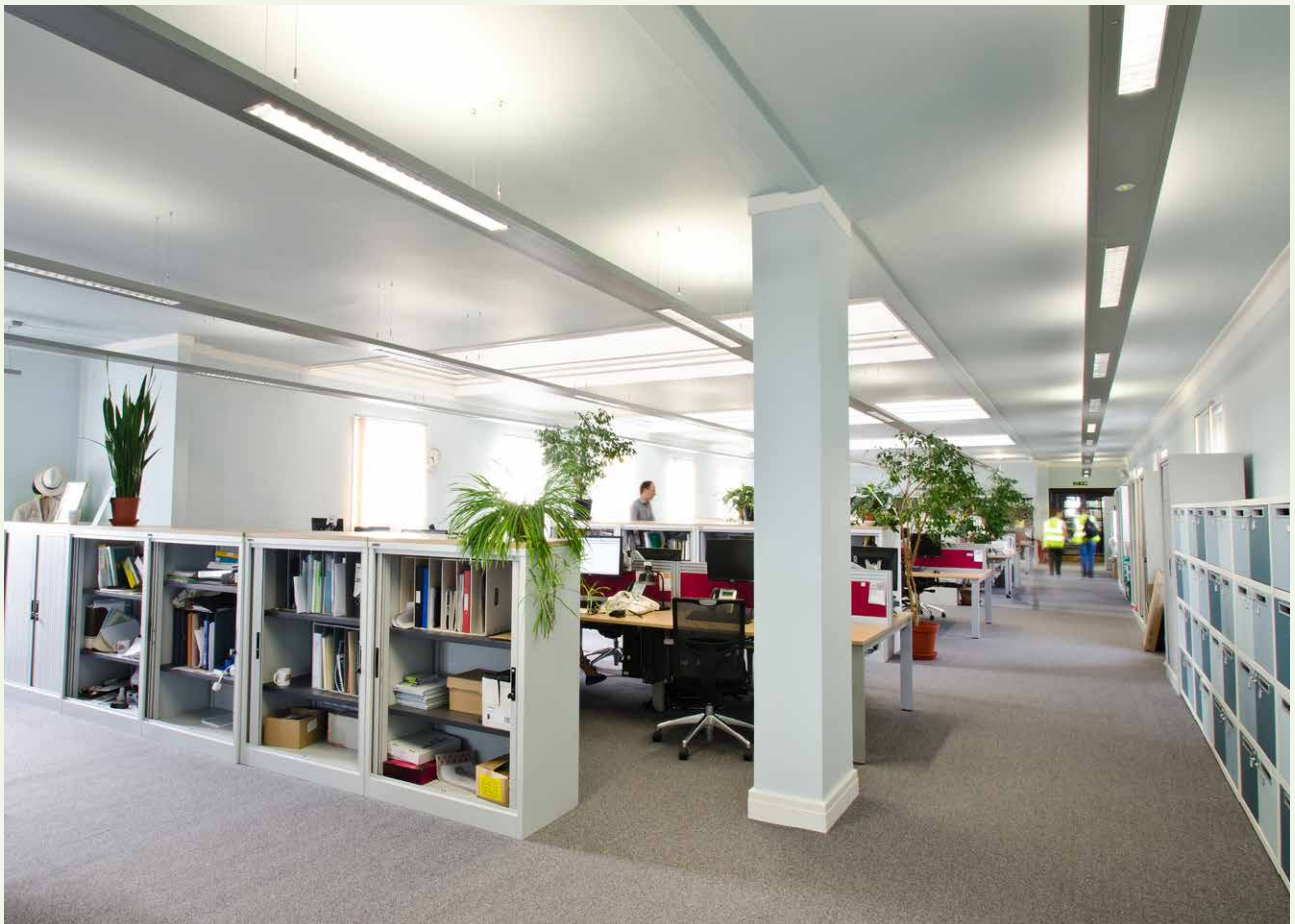
### Case Study: Norwich City Council – City Hall

Built in 1938, Norwich City Hall is a fine example of British inter-war municipal buildings and is Grade II\* listed. It occupies an elevated site overlooking the market square. The administrative centre was moved to this area in 1086 west of the newly built castle. The Guildhall was erected in 1407 to 1413 to the north of the Market for administering the City, and served this purpose for 500 years. City Hall was built because the administration of the City had out grown the Guildhall and was spread around the area in a mix of inappropriate buildings.

City Hall has a strong plan form and retains many of its original civic uses and is home to Norwich City Council. It is set over four floors, with the ground and first floors used by the public and the Council Chambers. The building is predominantly office accommodation. The Council was under financial pressure following years of efficiency savings that had removed most of the opportunities to reduce expenditure without cutting important public services.

The City Hall was costing £1.5m per year to operate. The cost of accommodation needed to be either reduced considerably or offset in order to prevent essential services from being cut in the financial year 2012 to 2013. For this reason, the Council undertook an accommodation review and concluded that they had to share accommodation with partners in order to generate income to offset the costs. Staff numbers were falling with each phase of savings; the strategy was to centralise staff, reducing the number of other office buildings whilst maximising staff numbers in City Hall. The Council wanted to retain its civic presence in the city, encourage new agencies into the building thus generating much needed revenue, and to implement a new work style across the council using ‘hot-desking’.

The work included removal of cellular offices to create open plan office spaces, the creation of one-to-one meeting rooms and conference areas, upgrading of washrooms and the restoration of terrazzo flooring, north lights, veneered doors and original features and overhaul of the existing heating system. The main landings have been retained intact; however the 1980s additions were removed revealing the original form. Original cornices have been retained.



**Grade II\* listed Norwich City Hall:** the layout has been modified to create an open and flexible working environment.



## 6.2 Putting assets into alternative use

Whilst there may be a preference for retaining ownership of its heritage assets this is not always possible or desirable for the buildings themselves. In some cases it is appropriate to consider

alternative uses. Sometimes it may be better to put heritage assets into productive use whilst retaining their key historic characteristics; especially if the alternative is for the building to remain vacant. There is a tendency for vacant buildings to deteriorate more quickly than buildings in use.

### Case Study: Hull City Council – Warehouse No. 9

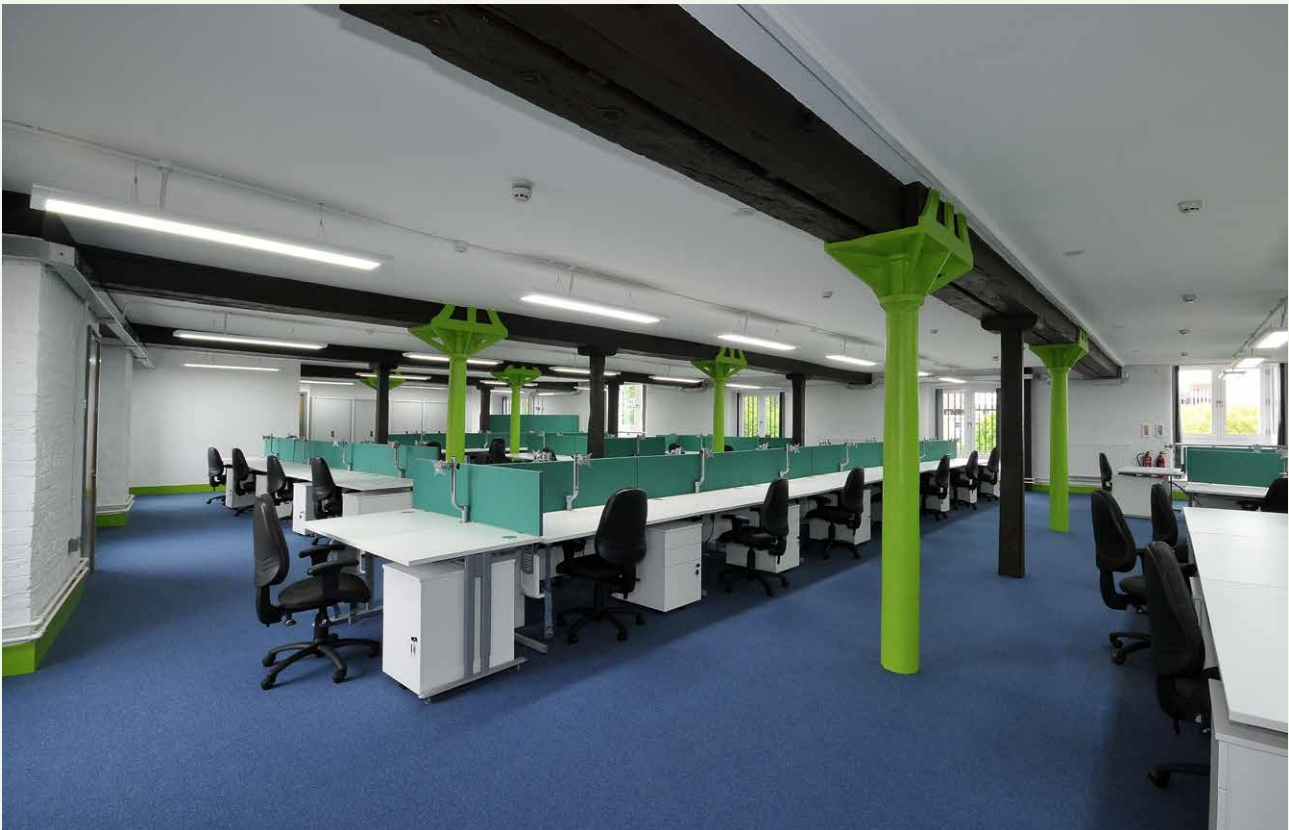
Warehouse No. 9 on Guildhall Road in Hull is a Grade II listed four-storey building which has been transformed, bringing it back into use as a contemporary office space whilst retaining its

historic features. Originally a warehouse serving Queen's Dock until 1930 when the dock was filled in, the building was subsequently used by the City Council as an Innovation Centre and since 1987 as a Managed Workspace Centre, known as Hull Business Centre, but had stood empty for two years.



**Grade II listed warehouse No. 9:** This historic warehouse has been converted into a modern office facility retaining historic features.





**Grade II listed warehouse No. 9:** internal view.

The old partitions were removed to create open-plan, flexible, office spaces with a new entrance lobby, reception area and meeting rooms – all fully accessible. The scheme has revealed the original timber beams and cast iron columns and opened up the spaces to natural daylight and ventilation. Essential building repairs and replacements to windows, roof and brickwork were sensitively carried out to ensure that the building's external appearance remained as close as possible to the original. The building is now home for 170 staff from the City Council's Neighbourhoods and Housing Services.

This project demonstrates how an historic building can be brought back into use as a contemporary office space, meeting current work place legislation and building regulations whilst retaining its key features. It is an example of the Council reusing an important industrial building in a contemporary way with the construction and design work all being delivered locally. The project is part of Hull City Council's programme to reduce the number of its operational buildings and to save costs by moving staff out of expensive to run buildings, which can then be released for redevelopment or refurbishment.

### 6.3 Transferring assets into community ownership

Whilst an authority may prefer to keep heritage assets within its own ownership this is not always necessary if there are viable alternatives for other forms of ownership which can both protect the building and bring it into sustainable use.

Community ownership, where the community has a sound financial basis and access to relevant experience, can be a viable long term management arrangement for historic assets. The key requirement is to ensure there is a viable and robust long term operating basis which will protect the asset (perhaps with the ability for the Council to intervene or re-assume ownership if these requirements are not met).

## Case Study: Wells Maltings Trust – The Maltings

North Norfolk Council transferred the Grade II listed former maltings and sackhouse at Wells-next-the-Sea on a 100-year lease to Wells Maltings Trust to help create a community facility. The Wells Maltings Trust has taken on responsibility to redevelop the former industrial buildings built in the 1830s into a mixed use facility with community space, start-up units, café, heritage centre and retail units. A local partnership identified the regeneration potential of the buildings and the need for a multi-use community facility to counter loneliness and economic disadvantage in this isolated rural coastal area. The charitable Wells Maltings Trust was created with support from existing community bodies and the district and town councils. After structural surveys to assess condition of the buildings they were transferred to the trust in 2010 on a long lease. The Trust has been developing the facilities in planned phases to optimise the support of local

volunteers and in line with available funding; which has come from a variety of sources.

The first phase of the redevelopment, the Sack-house, was opened in 2014 and includes mixed community space, offices for small businesses and community space to hire. Over the last four years, as well as completing the transformation of the Sack-house, the Wells Maltings Trust has organized and run the Wells Pirate Festival (as an annual community fundraiser campaign); taken over of the Tourist Information Centre under an Service Level Agreement with North Norfolk District Council, running it with a team of volunteers and managed the community centre and the Granary Theatre. The Trust is currently fundraising for phase 2 of the project to repair, restore and develop the historic Grade 2 Maltings building on Staithe Street. This phase will improve access throughout and provide space for a new heritage learning centre, cafe, central box office, improved auditorium and community space.



Grade II listed former maltings and sackhouse, Wells-next-the-Sea, Norfolk: the buildings are being transformed into a multi-use community hub.



## 6.4 Using heritage assets to create a sense of place

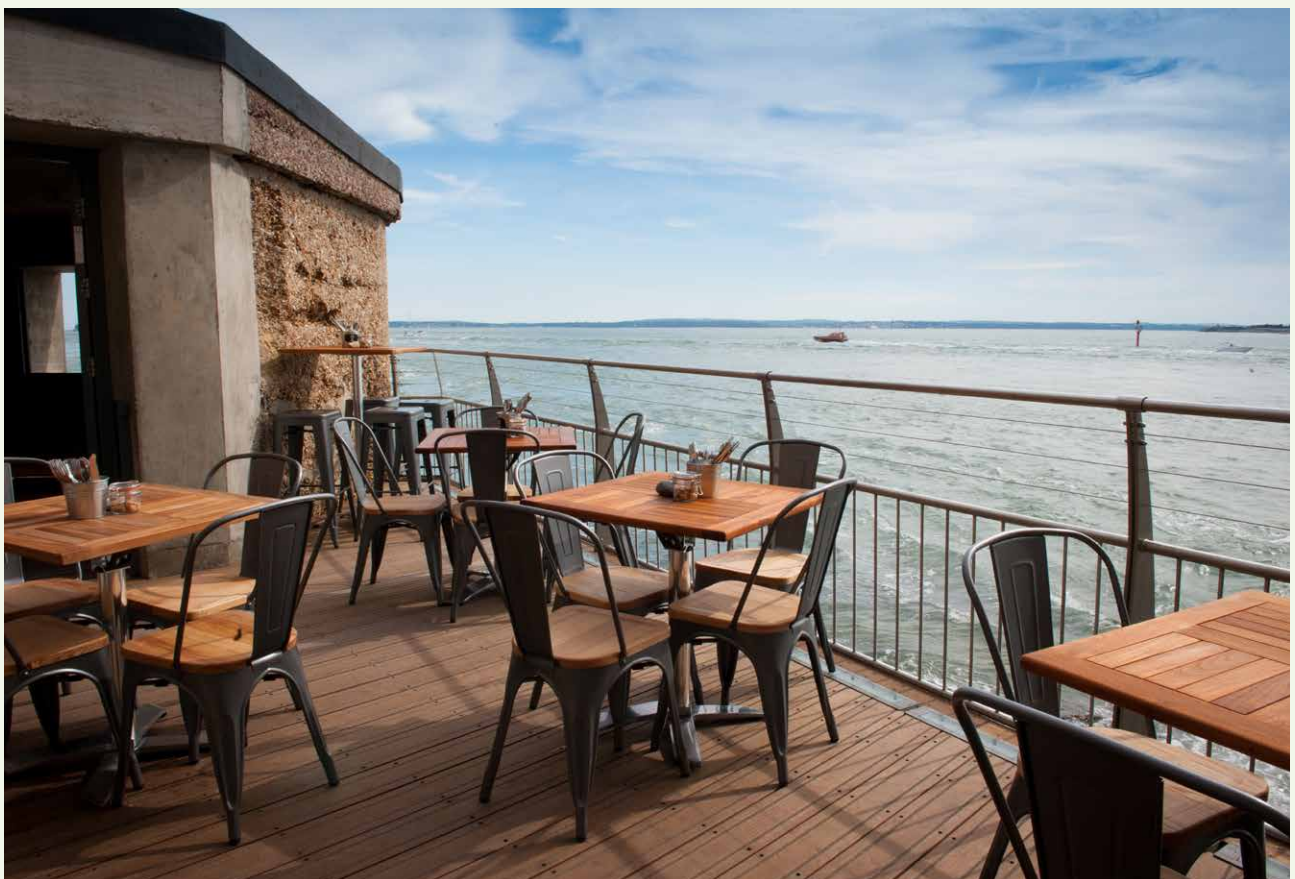
Heritage assets can play an important role in helping to create a sense of place. Investment in heritage assets to bring them into productive use or a good

state of repair can mean that heritage assets provide a focal point in an area and contribute to creating a sense of place and regeneration. In this way heritage assets can attract visitors and encourage spending in an area, as well as helping to create a unique atmosphere.



### Case Study: Portsmouth City Council – The Hotwalls Studios

The empty arches that form the Hotwalls Studios, previously used as army barracks and part of a historic monument alongside Portsmouth harbour, has reopened as a new creative quarter after a £1.75 million revamp. The arches have been converted into 13 working studios for artists and designer-makers in order to support the city's creative industries and boost tourism.



**The Hotwalls:** part of Portsmouth's historic fortifications, now converted into artists' studios and cafe.



**The Hotwalls:** the cafe.

The Hotwalls Studios is part of a listing within Portsmouth's harbour fortifications, parts of which date back to the 15th century. The structure is part Grade I listed and part scheduled monument. The arches on Broad Street, Old Portsmouth, have been given glass frontages as part of the redevelopment, with artists given the opportunity to apply for licences on studios. The scheme was funded by the government's Coastal Communities Fund with contributions from Portsmouth City Council and the Partnership for Urban South Hampshire.

Although the city council had made recent investment in the maintenance of buildings at Point Battery; it is important that ongoing funding was made available to continue this work. In terms of the condition of historic buildings it is widely recognised that those that are in sustainable long-term use fare better than those that aren't. The operating costs of the Hotwalls Studios are funded via income

from the on-site cafe: the council has secured a commercial tenant for these premises which is now operating as The Canteen, and from the studio rents themselves.

Under the terms of the Coastal Communities funding agreement, the council will manage the Hotwalls Studios for the first two years. During this period the City Council aims to develop the project as the focus for a cohesive, consistent, high quality, creative 'offer' in the city, with the studios and events space acting as a platform in which to showcase creative organisations, artists / makers and their networks. The City Council is also working with partners to support new creative businesses at the Hotwalls Studios; this includes providing business advice and support for tenants.

In the longer term the City Council will explore an alternative management model for the studios, possibly a not-for-profit structure such as a charitable trust, co-operative or other type of social enterprise.



## 6.5 Supporting community vibrancy and engagement

Heritage assets can in some cases act as a catalyst for securing community engagement – bringing people together around the cause of protecting heritage and bringing assets back

into use. Such community vibrancy is also an important element for regeneration. Councils have an important role in both supporting and facilitating this approach as they can provide specific specialist advice, direction to potential funding sources and in some cases direct funding support.



### Case Study: Birmingham City Council – Redevelopment of Stirchley Baths

Stirchley Baths in Birmingham which had stood derelict for nearly 30 years after closing in 1988 was reopened as a community hub on 14 January 2016. The former Bourneville Lane Swimming Baths were opened in 1911 on a site donated by the Cadbury brothers. But following years of neglect after closing, the Grade II listed building had fallen into a poor state of repair.

The community hub provides space to meet with facilities to support social, heritage, arts and culture; health and well-being; learning and enterprise. The swimming pool itself has been converted into a multi-purpose community hall. Other facilities include a cinema space, meeting rooms and a café. There are displays of historic photographs and artefacts (such as original signage and the original and new ceremonial keys) through the building. There are two innovative viewing holes where you can still see the old swimming pool deep end and the borehole in the café where you can see where they drilled down for spring water in the early 1900s.

The project was undertaken with funding from the Heritage Lottery Fund and Tesco through the sale of the former Stirchley Community Centre site to them.

#### [A-Z of Stirchley Baths first year of opening](#)

**Stirchley Baths:** a (Grade II listed) derelict swimming pool revitalised and made into a thriving community hub.

## 6.6 Working in partnership

A council is not always the sole custodian of its heritage assets. There are community organisations that may be willing to act as partners on a minority, equal or even 'leading' basis to manage and operate heritage assets.

### Case Study: Manchester City Council – Victoria Baths

Manchester's great Edwardian Water Palace – was opened in 1906, at the time costing double the average cost of a public swimming baths to build. It incorporated high quality finishes throughout its three pool halls as well as throughout the common areas and Turkish Baths suite. Stained glass and ceramic tiling was used throughout the complex. By the 1980s the running costs were becoming significant and the backlog of repairs growing and in 1993 the decision was taken to close the baths for good. The same year, the local community came together to form the Friends of Victoria Baths, campaigning to save the building for future generations.

The Friends undertook various essential works to clear rubbish from within the buildings, and opened up the premises to raise awareness of their special nature. In 2001 the City Council entered into a formal management agreement with the Victoria Baths Trust (established from within the Friends group) to improve security and raise grants for repairs. This led to the first major grant from English Heritage to patch all the roofs and treat dry rot, and winning the BBC Restoration fund in 2003 which facilitated significant works to the main front block of the building (undertaken in 2007 to 2008), and led to the securing of further funding in 2009 to renew the main Gala Pool roof. The Trust relocated their offices to the Baths in 2009, further improving security and broadening the programme of events on offer at the complex.

In such situations a council can provide support, direction and specialist advice to ensure heritage assets are both retained and put to productive use. Such arrangements may need some careful underpinning agreements to clarify respective roles and safeguard the asset.

The complex is now a vibrant arts and cultural centre in the heart of the local community – a local, regional and national asset attracting major events throughout the spring, summer and autumn seasons of each year. Whilst there remains much to do, the building is in beneficial use, is accessible to the wider community, hosts a strong programme of events, has a strong community of passionate volunteers behind it, and phased development plans for the future.



**The Grade II\* listed Victoria Baths, Manchester:** an example of what can be achieved through partnership, the derelict baths are now being refurbished into a cultural and arts centre.

## 6.7 Investment to ensure protection

In some cases, direct investment is required simply to protect the fabric of a heritage asset to prevent it falling into a state of further disrepair or to protect essential historic characteristics. Whilst this can often be viewed as a last resort in terms of management action it is an important instrument in conserving heritage.

## 6.8 Promoting access to heritage assets

The Equality Act 2010 places an obligation on public service providers such as local government to take all reasonable steps to remove, alter or avoid physical features that prevent access to services. Most authorities have taken steps to comply with this legislative requirement and have done so without compromising the character

or quality of their heritage assets. A creative approach using appropriate professional advice is often the key to providing an appropriate access solution. Specialist advice can always be sought when provision of access for people with physical disabilities is likely to be particularly challenging and may involve alteration of the fabric of a building.

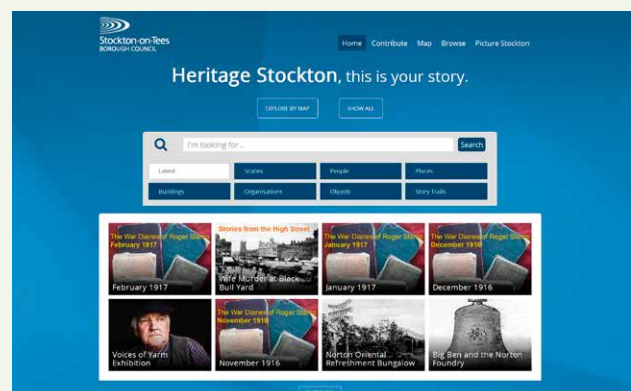
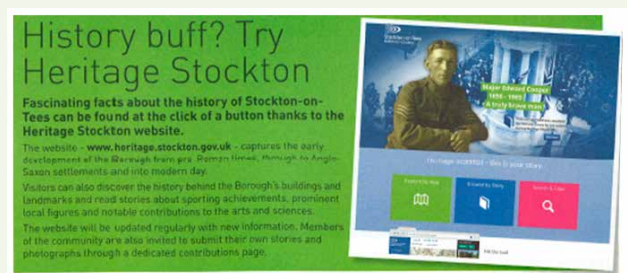
Access has a wider meaning than simple physical access; and councils also need to promote activities which encourage interpretation and understanding of its heritage. Many authorities have taken innovative approaches to this with walking trails, interpretation boards and open days so that the public can see parts of historic buildings which are not normally seen. This is important given the role heritage can play in supporting the tourist economy and in providing learning opportunities.

### Case Study: Stockton-on-Tees Council – Heritage Website

Stockton-on-Tees has launched a heritage website. This has been identified by the Council as an important resource for all those involved in conserving and promoting Stockton's heritage. The site is easy to navigate and brings together a variety of material, covering early settlement to the growth of the industrial age.

The site can be explored via a map base or by selecting one of 8 main themes which cover items such as 'stories', 'people', 'places', and 'buildings'. These themes lead onto more detailed information, narrative text, old photographs and scanned images. Members of the public are invited to contribute to the website by adding their stories and articles. Whilst not an objective of this project, the website could be readily adapted to become a comprehensive inventory of heritage assets.

[www.heritage.stockton.gov.uk/](http://www.heritage.stockton.gov.uk/)



**Top:** Heritage Stockton – Extract from council newsletter used as a way of promoting the Heritage Stockton website.

**Bottom:** Heritage Stockton website giving people access to, information about places, buildings, and stories through a simple structure.

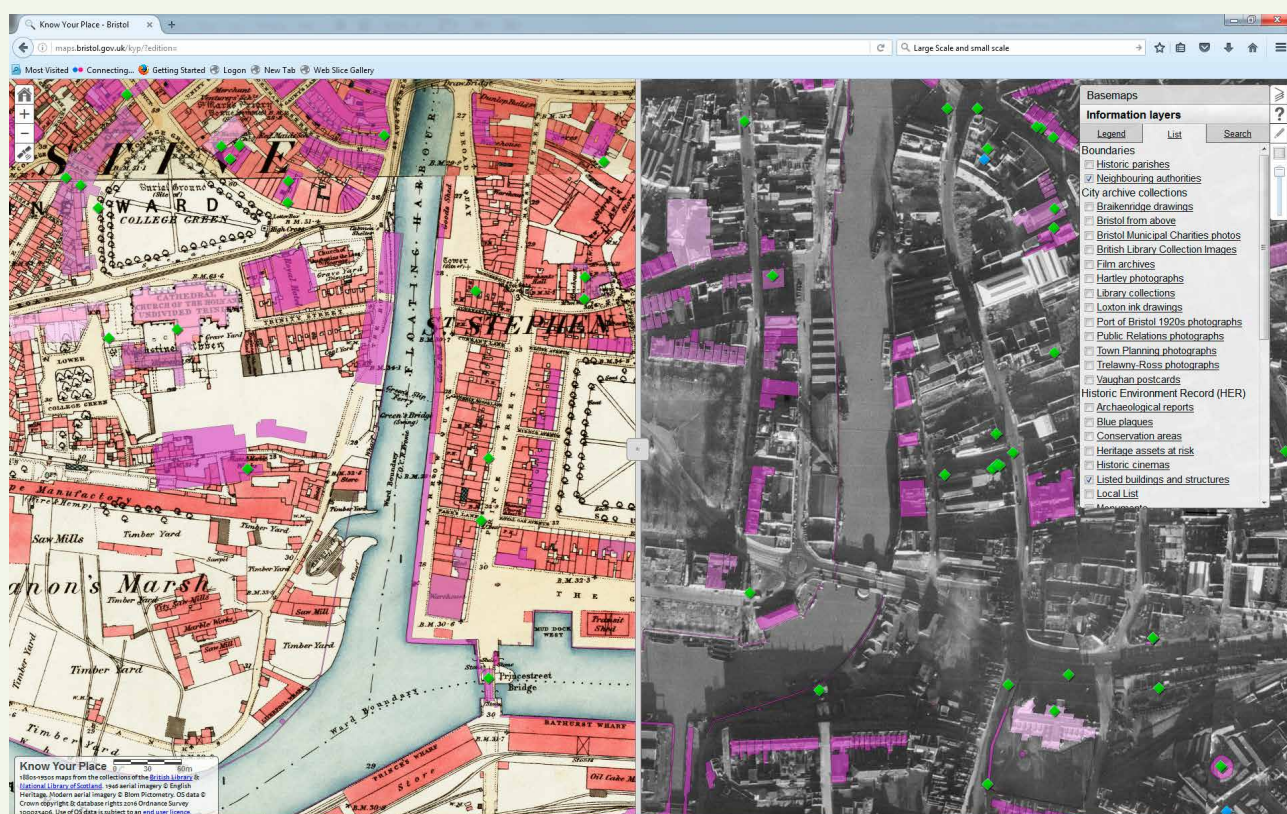


## Case Study: Bristol City Council – Know Your Place

Bristol City Council has adopted an innovative approach to encouraging access to heritage. 'Know Your Place' is a web based system that allows access to heritage information through historic maps, images and linked information. It is a website which encourages learning and also allows individuals and other organisations to add their own historic information in order to expand knowledge about neighbourhoods in the city. The website allows access to 'layers' of information which can be switched 'on' or 'off' and displayed through a map base of the city. Information on heritage is linked through to the map base so that users can readily access it.

The linked information is varied including photographs, memories, maps and other records. The range of heritage information being added to the website will grow over time with immediate plans to include: tithe apportionment data providing information about who owned plots of land in the 1840s; a layer of street names from the 1851 census to create a 19th century street search; further Ordnance Survey mapping including surveys undertaken by the council mapping team in the 1930s and 1940s and images from the Samuel Loxton collection of early twentieth century drawings.

[www.bristol.gov.uk/knowyourplace](http://www.bristol.gov.uk/knowyourplace)



Bristol City Council Know Your Place website;  
encouraging people to learn about the area and  
contribute their own information.

## 6.9 Disposal of heritage assets

There is continuing pressure on local authorities to dispose of assets that are costly to maintain and/or are no longer required. In some cases, the disposal of heritage assets may be the best solution. There is no rationale for local authorities to hold properties if they are not meeting a defined purpose (service delivery, staff accommodation or for investment reasons); unless the council sees its ownership as the 'owner of last resort' to fulfil a stewardship role in protecting a heritage asset. However, if considering disposal as an option then it will be important to take into account the community interest and to investigate potential partnership arrangements with a private sector partner or a community trust.

The focus throughout the disposal process should be on obtaining the optimum value whilst ensuring the protection of the heritage asset. This however, need not always be the case. A council can sell an asset for less than its market value without seeking specific statutory consent if it can demonstrate the sale will help to secure the improvement of the economic, social or environmental wellbeing of the local area, and the undervalue is only up to £2 million less than market value, and it does not breach State Aid rules. A useful method of disposal for heritage assets is under a development agreement whereby a local authority defines a development brief for a heritage asset, identifying new uses for the building and requirements for any renovation scheme allowing developers / purchasers to be procured on the open market. The local authority can retain ownership through the duration of the project in order to ensure the brief is being met and issues a license allowing works on site with the freehold or long leasehold of the asset transferred at the conclusion of the works.

### Case Study: Manchester City Council – Cemetery Lodges, Philips Park

Opened in 1866 Philips Park Cemetery was the first municipal cemetery in Manchester, named after Mark Phillips, a local business man and Member of Parliament. The two former lodges (Cemetery Office and Entry Lodge) occupy a prominent position on Alan Turing Way and form an integral part of the landscape of Phillips Park.

The two Grade II listed lodges to the main entrance of this historic, Grade II listed cemetery and park had been derelict for many years, roofing materials, windows and internal floors and fittings having all deteriorated or been removed through the impact of water

ingress and crime. A decision was taken to secure the future of the buildings through disposal to a suitable developer. They were advertised for sale on a long lease for £1, on the basis that the successful party had to enter into a contract that would secure the repair and reinstatement of the buildings as residential properties.

A resident approached the Council, who had personal connections with the lodges (her family had previously lived there), and whose partner was a local builder. They secured purchase of the lease, and over four years repaired and renovated the buildings in liaison with the Council's Conservation team and with English Heritage, and both buildings are now occupied and in beneficial residential use.



The disposal of the lodges did not result in the loss of any revenue to the Council but rather transferred the future maintenance costs to the successful lessee. This project is an example of one approach to ensure satisfactory repair of heritage assets as part of the disposal process. Local authorities have the scope to use covenants or bonds to ensure satisfactory repair by third parties before the formal transfer of title.

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**Grade II listed Cemetery Lodge, St Philips Park, Manchester:** an innovative disposal approach led to the lodge being brought back into a good state of repair and use.





## 6.10 Adapting heritage assets for housing

Because of the high demand for housing in many places there remains pressure to adapt heritage

assets for that purpose. The need to ensure any adaption is sympathetic to the significance of the asset may mean that such adaptations are relatively expensive. However, high house prices may mean that such options are increasingly viable.

### Case Study: London Borough of Haringey – Tottenham Town Hall and Isobel Place

A two phase redevelopment scheme rescued the former Tottenham Town Hall from the 'At Risk' register and also provided 109 new affordable homes. The scheme included the

renovation of the Grade II listed Tottenham Town Hall and a new associated residential scheme at Isobel Place for Newlon Housing Trust. The project was a close collaboration between bptw partnership, Newlon Housing Trust, United House and English Heritage. It involved the sensitive renovation of the exterior and interior of the Grade II Listed Edwardian



Grade II listed Tottenham Town Hall: phased redevelopment of the Town Hall and associated areas has brought the town hall into use as a community facility.



**Isobel Place:** The residential scheme at Isobel Place provided a cross-subsidy to help the refurbishment of the Town Hall.

Baroque Town Hall building, including the grand foyer and Moselle Room with its Moorish-Jacobean style ceiling. The newly restored Town Hall now provides functional spaces for businesses, an MP's surgery, a café and flexible meeting spaces. Isobel Place was part of a cross subsidy strategy to enable the refurbishment of the Town Hall and delivers 109 family homes. Situated on the backland site to the rear of the Town Hall, the development was sensitively designed to complement its historical context, with apartment blocks arranged around two south facing courtyards. A key focal point of the

development is the former central depot clock tower range which suffered brick decay and water ingress, and has now been refurbished and converted into an attractive terrace of houses.

The Town Hall, originally opened in 1905, remained Tottenham's seat of government until it was absorbed into Haringey council, which used it as offices. The opulent Moselle Room, once the main meeting chamber with an impressive plastered ceiling, has been restored for community use and can be hired for events.

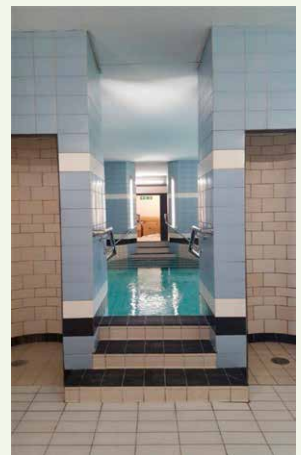


## Case Study: London Borough of Tower Hamlets – Redevelopment of Poplar Baths

A Grade II listed building, Poplar Baths, originally opened in 1852, was built to provide public wash facilities for the East End's poor as a result of the Baths and Washhouses Act 1846. The 'slipper baths' section originally contained six baths for women, with twelve baths in the men's first-class section and twenty four in the second-class. The steam and shower bath areas were behind the slipper baths and the laundry was at the rear of the building, on Arthur Street. The laundry contained 48 separate wooden

washing tubs, drying equipment and ironing rooms. Rebuilt in 1933, the larger pool was floored over, designated the East India Hall and converted to a theatre with a seating capacity of 1,400, with a dance hall, cinema, exhibition room and sports hall. Wartime bomb damage forced the closure of the main bath hall. Poplar Baths reopened in 1947 and continued to be used as a swimming facility until 1988; when it closed and fell into disrepair.

The baths have been redeveloped as a modern leisure centre, retaining its attractive historic architectural features, with a new 25 metre swimming pool and 60 flats on a site to the rear.



**Poplar Baths (Grade II listed):** the once derelict baths have been redeveloped into a leisure facility whilst retaining its main architectural features.

**Top and bottom left:** Poplar Baths internal view before redevelopment.

**Bottom middle:** Poplar Baths external view.

**Top and bottom right:** Poplar Baths internal view after redevelopment.



# 7 Review

## 7.1 Reporting

A key mechanism for sustaining the profile of heritage assets is through regular reporting. Individual Councils will need to determine the appropriate reporting frequency, form of reporting and who reports are targeted at. The simple requirement of reporting underpins the need for review – in order to advise on progress or otherwise. Review and reporting is an area of practice which is poorly developed. It is recommended that where a heritage strategy is developed this specifies review frequency and approach, for example, a formal report on strategy progress on an annual basis. ‘Best practice’ in asset management suggests that performance on property matters can be defined through an ‘annual performance report’. This could be extended to include a specific reference to heritage assets. Many alternative arrangements could include reporting through to a Corporate Asset Management Group or a Conservation Panel if these exist. Key requirements when thinking about reporting arrangements are how to sustain profile and how to make an impact; where possible it is best to report at a senior officer or senior member level.

## 7.2 Performance measurement

It is important councils establish mechanisms and monitoring arrangements to review the effectiveness of heritage management policies and practice. Success can be measured in a variety of ways including in terms of service delivery objectives, contributions to wider corporate objectives (such as supporting regeneration) and asset portfolio performance. Specific performance measures can be identified which are then tracked over time. Identifying these can be problematic; but one approach is to identify one or two key heritage performance indicators which can be used as part of a mix of performance indicators for the portfolio as a whole. A key indicator is likely to be around the ‘stewardship’ of heritage assets to ensure that physical nature is not deteriorating. A simple measure and targets based on the number of ‘buildings at risk’ is perhaps the starting point for performance measurement. This can be reported on a systematic basis to an appropriate senior member or officer forum to sustain the profile of heritage management and ensure that incipient risks to heritage assets are recognised and responded to.

# 8 Working Together

## 8.1 Key issues in collaborative working

Partnership working has become increasingly important in the current policy and resource context encouraging joint working - between neighbouring authorities or with individual authorities with community or private sector organisations. This partnership working is consistent with national policy drives for regeneration, resource efficiency and place shaping. The recommendations for managing heritage assets in practice, sections two to seven, also apply when organisations work together. However, there are additional considerations for joint working arrangements.

- Senior level local authority – joint working arrangements are likely to be more effective if there is senior member and officer commitment. This will help give direction and ensure barriers to partnership working are overcome.
- Overall governance – the ability to formalise joint working through agreed governance arrangements will also support effectiveness. These need not be a detailed set of procedures but rather an agreed set of over-arching commitments expressed simply through a formal ‘compact’. This as above will require senior member and officer endorsement in order to enshrine the commitment to joint working.
- Shared vision – agreement on common aims and objectives and a set of agreed actions will be important in translating commitment into action. This can help to raise the profile of heritage matters as well as helping to direct scarce resources (staff and funding) to common priorities.
- Pooling resources and expertise – joint working can also facilitate better use of scarce expertise. There are a variety of approaches that can be adopted including joint funding of conservation specialists, common procurement arrangements, shared conservation services and creating unified heritage recording / data systems.

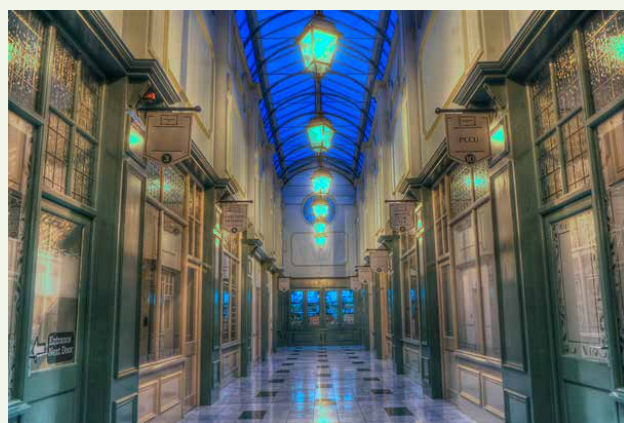
There are emerging examples of joint working on heritage matters and this impetus for collaborative working is likely to continue.

## Case Study: Growth Lancashire – Heritage Investment Strategy 2015-20

The Councils of Pennine Lancashire along with Growth Lancashire (formerly Regenerate Pennine Lancashire) have worked collaboratively to develop a [Heritage Investment Strategy](#). The strategy emphasises the importance of heritage regeneration and

of identifying opportunities for working in partnership to leverage additional funding.

As part of the work the leaders or Chief Executives of the participating bodies have agreed a ‘Heritage Compact’. This demonstrates a strong shared commitment to raising the profile of heritage matters and to working jointly through shared heritage services.



The Growth Lancashire Investment Strategy includes profiles of the principle towns in the area with details of specific building related schemes.

**Left:** Blackburn Cathedral.

**Top right:** Ilex Mill – Rawtenstall.

**Bottom right:** Royal Arcade - Colne.

The historic environment presents a number of challenges and opportunities for Pennine Lancashire. Local leaders and Chief Executives have agreed a compact to ensure heritage led regeneration can take place within Pennine Lancashire. We will:

1	Commit to deliver this heritage investment strategy with the priority projects and continually review new opportunities for development;
2	Work with our local communities to increase civic pride in our built heritage;
3	Work with the Government agencies and our delivery partners to raise the profile and visibility of Pennine Lancashire as a heritage destination to visit and stay;
4	Showcase our built heritage, cultural heritage and contemporary culture, with shopping and sporting activities to visitors outside Pennine Lancashire;
5	Improve the attractiveness of heritage to inward investment through better marketing, packaging and championing opportunities within heritage;
6	Review alternative delivery models and sharing services within conservation across Pennine Lancashire which maximises funding and investment opportunities;
7	Use our statutory powers to create redevelopment opportunities from those heritage assets in neglect;
8	Share heritage and conservation services across Pennine Lancashire local authorities and continue to develop and work with heritage networks beyond;
9	Develop skills through local authority construction procurement and contracts within heritage assets including apprenticeships and community learning opportunities as well working with local skills providers to ensure heritage skills continues to grow;
10	Act as champions and custodians to protect and enhance our built heritage for future generations.

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**The Heritage Compact** from Heritage Investment Strategy 2015-20, Growth Lancashire.

# 9 Further Reading

The Disposal of Heritage Assets by Public Bodies;  
A report by Green Balance for the National Trust;  
2006

<http://greenbalance.co.uk/sites/default/files/NT%20DisposalOfHeritageAssets%20Sept06.pdf>

RICS. Local Authority Asset Management 07 -  
Disposal of Land at Less than Best Consideration  
<http://www.rics.org/uk/knowledge/guides-advice/local-authority-asset-management/local-authority-asset-management-07-disposal-of-land-at-less-than-best-consideration/>

Local Government Act 1972: General Disposal  
Consent Order 2003  
<https://www.gov.uk/government/publications/disposal-of-land-for-less-than-the-best-consideration-that-can-reasonably-be-obtained-circular-06-2003>

BS 7913: 2013 Guide to the conservation of  
historic buildings  
<https://shop.bsigroup.com/ProductDetail/?pid=000000000030248522>

The Prince's Regeneration Trust. Delivering  
Regeneration through Heritage; the Sustainable  
Heritage Toolkit  
<http://www.princes-regeneration.org/sustainableheritage/toolkit>

Pillars of the Community  
<https://historicengland.org.uk/images-books/publications/pillars-of-the-community/>

[publications/pillars-of-the-community/](https://historicengland.org.uk/images-books/publications/pillars-of-the-community/)

Inclusion of Heritage in Asset Management Plans  
<https://historicengland.org.uk/images-books/publications/inclusion-heritage-asset-management-plans/>

Making Changes to Heritage Assets : Historic  
England Advice Note 2  
<https://historicengland.org.uk/images-books/publications/making-changes-heritage-assets-advice-note-2/>

Managing Significance in Decision-Taking in the  
Historic Environment :Good Practice Advice in  
Planning 2  
<https://historicengland.org.uk/images-books/publications/gpa2-managing-significance-in-decision-taking/>

Understanding Historic Buildings: Policy and  
Guidance for Local Planning Authorities, (2008)  
<https://content.historicengland.org.uk/images-books/publications/understanding-historic-buildings-policy-and-guidance/understanding-historic.pdf/>

The Disposal of Heritage Assets: Guidance note for  
government departments and non-departmental  
public bodies, (2010) English Heritage (This  
document is being updated by Historic England)  
<https://historicengland.org.uk/images-books/publications/disposal-heritage-assets/>

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