

February 2019

USING APPROPRIATE EXPERTISE for HERITAGE STATEMENTS / ASSESSMENT OF SIGNIFICANCE

Listed Buildings

Caring about the history and fabric of historic assets will mean some changes are sometimes necessary, and if designated will require **listed building consent**, if these changes include demolition, alteration or extension that affect its character as a building of special architectural or historic interest. Under planning policy you will be asked by your LPA in England, if they are to consider granting you listed building consent, for you to provide a heritage statement/assessment, this will enable them to fully understand how your proposed changes will impact on the significance of your listed building. It is required under legislation **National Planning Policy Framework 2018** in England that an understanding of the history and fabric of your home, and what makes it special architecturally, historically, its exterior elevations and its setting, this includes the interiors, including historic fixtures and fittings, is necessary when making changes.

Q. Who should write these Heritage Statements? And assess the significance?

NPPF 2018 policy paragraph 189 states “*assets assessed using appropriate expertise*” The British Standards BS 7913 guide to ‘The Conservation Of Historic Buildings’ recommends “*using competent qualified experts in the field of conservation when assessing significance*”.

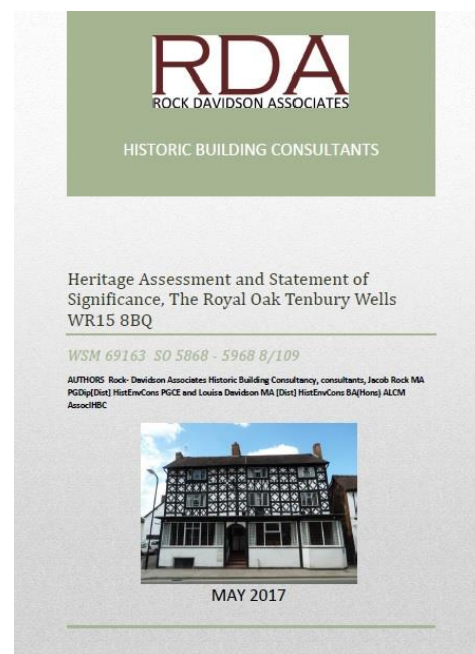
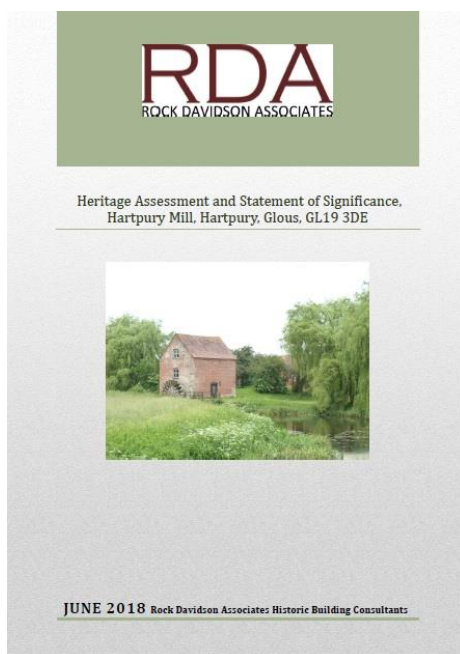
All listed buildings have a list description completed at the date of designation. Heritage statements should not be written using this list description alone, all elements of building exterior and interior are listed and the shorter list entries in England are only there as identification, the more recent listings explain more detail about significance, but it is not an in-depth description and older entries can offer little detail. Most listed property owners find that good information about the listed property in a detailed heritage statement provided by a qualified heritage professional, available at the outset of a proposal, can speed up the listed building application.

In England the Historic England **Conservation Principles Guidance 2008**, (shortly to be updated) addresses issues of understanding heritage values, assessing heritage significance and managing change. This means understanding the historic fabric and evolution of a building, and of a place, phasing, identifying who values it and why, the value of fabric and its importance and the contribution made by setting and context. There are four principal values, archaeological, architectural, artistic and historic. Managing change should involve an assessment that has enough information to then understand the impact, have considered reversibility and compare options. Assessing the impact and evaluation of a heritage asset for a project proposal is often the role of the conservation officer or planning case officer but sufficient information must be

submitted with a listed building planning application. This can be achieved if a professional heritage statement assessment accompanies this planning application.

Local planning authorities can vigorously insist applicants provide appropriate information before registering and validating submitted planning applications for listed buildings. Otherwise in England reports submitted would not wholly comply with the NPPF. A **Heritage Statement And Assessment Of Significance** is not the same as a Design & Access Statement although this may also be needed for a planning application.

It is the role of the heritage expert, qualified in assessing historic buildings, to assess historic assets along with its setting, understanding the architectural phasing (or how it has changed through time) and historical background of the building and place.



RDAs established practice as experienced heritage and historic building consultants means that assessment always involves a visit to the building to undertake an on-site survey and use of a traffic light system to assess the significance high-to-low (red being the highest significance). We use Historic England's 'Conservation Principles' [2008] as guidance as well as our wide experience and training in the conservation and architectural knowledge of historic buildings and the environment. The data from the survey is always included in our heritage assessment and statement reports for evaluation, so sympathetic changes can be made. We frequently advise clients that it is best that an assessment of significance is undertaken before becoming too fixed on a project outcome in case compromises and alternative solutions are needed.

Heritage Statements/Assessment of Significance

Our assessments of the significance of the building and site from the survey are always then incorporated into any Heritage Statement, saving time and money. Using experts will help identify what is significant and what may be having a negative impact on a listed property. Often we find this has been inappropriate additions or use of inappropriate materials, frequently prior to listing, so phasing and evolution in our assessment is important, and a case can then be made to improve these negative elements by carefully considered alterations. This will usually be followed by a Heritage Impact Assessment so the impact of any proposed works on the buildings significance and setting can be properly assessed.



Managing Significance in Decision-Taking in the Historic Environment

Historic Environment Good Practice Advice in Planning: 2



Reference: **Managing Significance in Decision-Taking in the Historic Environment** **Historic Environment Good Practice Advice in Planning: 2 Historic England 2015**

Using appropriate expertise

18.

‘Expert advice on where the significance lies and its sensitivity to change can unlock viable uses for the asset and secure its long-term future. It can also be very valuable in minimising and mitigating impact, therefore avoiding conflicts between the owner’s reasonable aspirations for the site and its conservation, particularly if it is sought early. Where the proposal is likely to affect the significance of heritage assets, early engagement with appropriate expert advice and the relevant local authority heritage advisers will be helpful both in developing an understanding of significance and in identifying the level of information needed to support the application and can be helpful throughout the process.’

19. There are several established registers that can be used to identify appropriately qualified specialists or organisations, depending on the nature of the project. Though not exhaustive, the alphabetical list below may be helpful:

Architects Accredited in Building Conservation Ltd , Chartered Institute for Archaeologists (CIfA), The Institution of Civil Engineers and the Institution of Structural Engineers, Institute for Conservation (ICON),

*** The Institute of Historic Building Conservation**

(IHBC) has a register of accredited organisations for historic environment practice. The IHBC requires its members to meet defined levels of competency.

[NB RDA professionals have not only followed an IHBC accredited Masters Course in Historic Environment Conservation, but Louisa Davidson is also an accredited Full Member]

Royal Institute of British Architects, operates a register of architects accredited in building conservation, for works on listed buildings, scheduled monuments and pre-1900 buildings. The Royal Institution of Chartered Surveyors maintains a register of accredited building conservation surveyors.

20. Some projects may need more than one type of specialist and, indeed, others, for instance planners and architectural historians.

Conservation Principles and assessment

13. The reason why society places a value on heritage assets beyond their mere utility has been explored at a more philosophical level by English Heritage in Conservation Principles (2008). Conservation Principles identifies four types of heritage value that an asset may hold: aesthetic, communal, historic and evidential value. This is simply another way of analysing its significance. Heritage values can help in deciding the most efficient and effective way of managing the heritage asset so as to sustain its overall value to society.

14. Assessment of significance, on a UK wide basis, is also covered in Part 4 of **British Standard 7913:2013 Guide to the Conservation of Historic Buildings**

Reference: **Managing Significance in Decision-Taking in the Historic Environment**
Historic Environment Good Practice Advice in Planning: 2 Historic England 2015

<https://historicengland.org.uk/images-books/publications/gpa2-managing-significance-in-decision-taking/>

RDA has found that few Local Planning Authorities are offering correct advice about Heritage Statements and assessing significance. In Central England only Cherwell & District Council and The Cotswold District Councils appear to offer clear advice complying with NPPF policies on assessing significance.