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Guiding principles for the good management of heritage assets

1 Introduction

The extent and richness of local authority-owned heritage assets is a tangible reminder of the long tradition of English local government in serving the needs of communities. The quality of this heritage contributes significantly to local identity and distinctiveness. How it is managed today is vitally important, not only so that we can pass it on to future generations in good order, but also because its treatment inevitably is seen as a reflection of a local authority's commitment to the stewardship of the wider historic environment.

English Heritage is the government's statutory advisor on the protection of England's historic environment. This guidance represents our first step towards fulfilling a commitment in the government's policy statement *The Historic Environment: A Force for our Future*² to issue advice to local authorities on the care of heritage assets in their ownership. It is concerned primarily with retaining and recovering quality in the existing civic estate and complements the advice from the Commission for Architecture and the Built Environment (CABE) in *Better Civic Buildings and Spaces* on the need to secure quality in publicly funded new construction. The Audit Commission's report *Hot Property* provides the wider context, emphasising the need to minimise the cost of property (consistent with prudent asset management), while maximising its contribution to core council services.

This guidance underlines the need for local authorities to take a strategic, long-term view of the role and value of their heritage assets, especially when decisions are made about change or disposal, and the crucial importance of preventative maintenance. The continuing, consistent care of heritage assets is fundamental, not only to good conservation practice, but also to efficient and economical property management; in other words, it sustains both the cultural and market values of the assets. The need for informed judgement to be exercised when decisions are being made about the conservation of heritage assets is emphasised in British Standard 7913: *Guide to the principles of the conservation of historic buildings*³.

2 The Context

2.1 The importance of heritage assets

'Heritage' is about the values that people attach to places. Our rich inheritance of local authority-owned heritage assets reflects the history of communities and public service. These buildings make a crucial contribution to local identity and distinctiveness. They help to enhance the quality of our lives through their use for cultural, educational, leisure and operational purposes, and service provision. As an expression of local pride and achievement, often over several centuries, they matter to people – who must be consulted about their future.

Local government has developed over many centuries, both as an expression

of the aspirations of communities, and to serve their needs. Charters gave communities corporate, legal identity, and with it came the need for officials and buildings. During the nineteenth century, the number of local authorities grew dramatically, as did the range of their functions. Not just town halls, but police stations, market halls, schools, sewerage works, baths, tram sheds and many more types of building, as well as parks and gardens, were now needed. In the twentieth century, the range expanded as local government provided more services, leisure facilities and social housing. Local authorities also, of course, have acquired many historic buildings and sites, often to ensure their preservation, but sometimes incidentally, or through abandoned development proposals, or road schemes.

The current concept of heritage essentially concerns the values people attach to buildings and places. Heritage assets mean many things to different people; they are powerful physical expressions of individual and community aspirations, emotions, history (past events), identity and sense of place. Thus heritage can be defined by the importance that individuals and communities attach to it. In the case of local authority-owned heritage assets, especially those of obvious civic significance (such as town halls), or public use (including historic social housing), the link to a specific geographical community tends to be particularly strong.

² Department for Culture, Media and Sport, December 2001, p37

³ BS 7913, British Standards Institution, 1998.

The importance of maintenance

Planned maintenance and repair programmes are essential for all heritage assets, and should be based on regular, detailed inspections and condition reports.

Best value reviews give local authorities the opportunity fundamentally to re-examine the management of their properties. These reviews, and the asset management plan process, should provide the context in which managers can prioritise and set maintenance programmes and predict the pattern of future maintenance needs. It may therefore be useful to link cyclical inspections and reports on the condition of heritage assets with a best value review. A higher standard of maintenance is likely to be required for heritage assets than for the corporate property estate as a whole and management arrangements should make this explicit.

Disposal of heritage assets

Take a positive attitude to disposal

The disposal of heritage assets, especially those that are potentially straightforward to adapt to alternative uses, may provide the best solution for such property.

Government guidance urges local authorities only to continue to hold property assets if they fit the authority's current requirements in terms of achieving its objectives, including financial. In the current climate, there needs to be good reason to retain council property. A distinction should be made, however, between those assets whose historic importance rests largely on their character as public buildings and those that are only in public ownership by chance. For the former, every effort should be made to continue their core civic/public uses. If that is not reasonably achievable, disposal should take account of the community interest in the public spaces, perhaps through a partnership arrangement (say with a private sector partner, or a building preservation or community trust).

Obtain optimum value

The aim on disposal of heritage assets should be to obtain optimum value, rather than the highest price.

The aim should be to obtain the best return for the taxpayer that is consistent with government policies for the protection of heritage assets: this may well limit the realisation of potential development values. The government's more relaxed approach to disposal at less than highest price has helpfully been confirmed in the *Draft General Consent for the Disposal of Local Authority Land* and accompanying circular¹. If adopted, this will enable local authorities "to dispose of any interest in land held under the terms of the Local Government Act 1972, which they consider will contribute to the promotion or improvement of the economic, social or environmental well-being of the area for less than best consideration reasonably obtainable", provided the undervalue does not exceed £2million.

¹ Local Government Act 1972: General Disposal Consent 2003 (draft), ODPM, December 2002

Providing access for everyone

With thought and care, historic buildings can usually be made accessible to all members of the community without compromising their character and quality.

A creative and flexible approach can often provide the key to finding appropriate access solutions for historic buildings. For heritage assets that do not have a functional use, and where physical access is not possible for all, other methods should be considered to promote public understanding and appreciation of the cultural significance of the asset (ie. through presentation and interpretation).

Good management planning for heritage assets

Know what you own

In order to review and rationalise council-owned property and provide for funding and managing heritage assets, it is essential to have full and up-to-date information on the extent, nature and physical condition of the estate.

Current government guidance (including the asset management plan process) encourages local authorities only to hold property for operational or investment purposes, that link to, or support, their wider corporate objectives. Some local authorities, especially those with extensive property holdings, either do not know the full extent of their estates, or do not have comprehensive data on the number, nature, use, physical condition and performance of the property assets they own – including those with heritage value (ie not just scheduled or listed). Such information provides the basis for the effective management of property assets and needs to be both available and accessible.

Develop a council-wide strategy

An over-arching strategy for council property, regularly reviewed within the authority's overall strategic plans, will be the key to keeping heritage assets in compatible uses, or determining appropriate disposal.

The local authority's over-arching strategy for its property should support its wider strategic priorities. The long-term maintenance and repair, and appropriate use, of council-owned historic buildings and other heritage assets, such as parks and gardens, should therefore be identified as a strategic objective in the council's community and corporate plans – not least because of the wider cultural, social and environmental value that these assets may have regionally, as well as for the local community.

Managing heritage assets

Understanding as the basis for management

Understanding the nature, significance, condition and potential of a heritage asset must be the basis for rational decisions about its management, use, alteration or disposal.

A sound, but succinct, understanding of a heritage asset is essential in order to determine why and how it is significant. This in turn highlights the opportunities for and constraints on change, and informs decisions about management, alterations, or disposal. Clear understanding must also provide the basis for the detailed planning brief that normally should be prepared when disposal is considered.

'Heritage asset' is used throughout this guidance to include scheduled monuments and other archaeological remains; historic buildings, both statutorily listed and those of more local importance; conservation areas; historic landscapes, including registered parks and gardens, cemeteries and registered battlefields; and historic elements of the wider public realm, including publicly-owned and managed spaces and recreational parks.

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Local authorities' responsibilities

The functions and structure of local government continue to change, with increasing emphasis on improving local authority services. "Best value" plays a key role and has stressed the importance of developing performance indicators and benchmarks for property management.

The recent White Paper *Strong Local Leadership – Quality Public Services* introduced a new comprehensive performance management framework for local government, which includes the management of property assets. Local authorities' explicit objectives for holding property should be developed from, and relate directly to, the overall objectives set out in their performance plans under the best value regime; but should also contribute corporately to their protection of the historic environment and other related objectives.

Key objectives in managing heritage assets

Championing quality

Achieving quality in both the care of inherited local authority heritage assets and new construction needs leadership at senior level by a designated design and historic environment champion, either the cabinet portfolio holder, or a chief officer.

This is crucial to ensuring that all aspects of heritage asset management are co-ordinated and appropriate standards achieved. "Joined-up thinking" and integrated corporate working across the whole authority are vital.

Setting a good example

It is essential to local authorities' credibility as stewards of the historic environment that they set a good example in the management of their own heritage assets. This means demonstrably achieving the standards they expect of others.

The benefits of good governance in managing local authority heritage assets and the repercussions of failure to utilise or maintain them adequately, especially historic buildings of long-standing civic importance (such as towns halls, assembly rooms and swimming baths) should not be underestimated. Credibility in action to secure the future of heritage assets in private ownership depends on responsible stewardship of council-owned heritage assets.

Making the most of heritage assets

Many heritage assets, particularly historic buildings that have, or had, a functional purpose, are capable of continuing beneficial use.

Local authority buildings represent a major public investment. Although such buildings need not always remain in public ownership, being generally well constructed, they can be inherently sustainable and often capable of significant adaptation to meet an authority's changing needs.

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