



LANCASTER CITY COUNCIL

Promoting City, Coast & Countryside

Final Report of the Council Assets Task Group

*A report of the Overview & Scrutiny
Committee*

October 2008

CONTENTS

		<u>Page No.</u>
1.0	Foreword	3
2.0	Introduction	4
3.0	Summary of Recommendations	5 - 6
4.0	Role of Task Group	7 -10
4.1	Terms of Reference	7
4.2	Membership	7
4.3	Meetings	8
4.4	Site Visits	8-9
4.5	Documentary Evidence	9-10
5.0	Status of Report	11
6.0	Background and Context	12 - 14
7.0	Findings	15 – 40
	<u>FIXED ASSETS</u>	
7.1	External Funding	15-18
7.2	Engagement with interested parties	18-22
7.3	Maintenance	22-30
	<u>NON-FIXED ASSETS</u>	
7.4	Historic Charters of Lancaster	31-32
7.4.1	Paintings	32-35
7.4.2	Other non-fixed assets	35-37
7.5	Records Retention	38-39
7.6	If You've got it flaunt it – Providing Value to the Community	39-40
8.0	Appendices	

1.0 FOREWORD

The origins of the Council Assets Task Group lie in a Remembrance Day service last year. After the service, when various dignitaries were gathered in the banqueting suite comment was made about the beauty of the room - but the shocking state of some of the portraits in it. Informal investigations were made about the maintenance of these assets; these eventually led to a wider concern about how Lancaster City Council views and uses its historical heritage.

Overview and Scrutiny established this task group to research how Lancaster City Council maintains its historical heritage. The task group makes recommendations on how this could be improved and how our assets may be better utilised in the future. There can be no doubt that we have a rich inheritance in the district and this could be an important enhancement to tourism.

The work of the task group looked at two areas: the council's fixed assets - buildings, statues and the street scene; and also the non-fixed assets, paintings and furniture. The council has listed buildings and important works of art in its portfolio. The council is also in charge of the up keep of several important historical documents for the district. The task group has made recommendations on all of these areas - a massive piece of work.

The work of this task group has been engaging and has revealed aspects of the district that many would not know about. Can I thank all those involved, councillors, officers and all those who gave evidence. I hope that its recommendations will lead to a greater awareness of the heritage of the district and make sure that it is protected.

**Cllr. Stuart Langhorn,
Lancaster City Council: Lower Lune Valley Liberal Democrat Group Leader
Chair Overview and Scrutiny**

2.0 INTRODUCTION

It gives me great pleasure to introduce the final report of the Council Assets Task Group.

Many buildings and artefacts of archaeological and historical significance in our district are in ownership of the City Council. Over the years concerns have been raised about the condition of the Council's historic assets. The Council Assets Task Group has taken on the challenge of investigating these concerns and making recommendations as to how the Council can move forward to ensure that the Council's historic assets are preserved for future generations.

During our investigations we met with representatives of local historic societies, received information regarding the condition of the Council's fixed and non-fixed assets, and received advice about storing and preserving historical records. The task group also enjoyed a visit to the Conservation Centre at Preston.

The report highlights areas where the Council needs to take prompt action to prevent further deterioration of the Council's historic assets. This report also makes recommendations regarding record management and promoting the district's heritage.

It would appear that in the past reports about the condition of the Council's historic assets have not been acted upon. It is therefore vital that we do not let this happen again.

Finally, I would like to take this opportunity to thank everyone who has been involved in providing and gathering evidence for the task group.

Councillor Rebekah Gerrard
Chairman, Council Assets Task Group

3.0 SUMMARY OF RECOMMENDATIONS

RECOMMENDATION 1

- (a) That a co-ordinated approach for applying for external funding for heritage projects be developed and led by an appropriate Director, such as the Corporate Director (Regeneration), with consideration given to identifying heritage projects which would meet the criteria for external funding and engaging with/supporting community groups who take an interest in promoting the district's heritage.

RECOMMENDATION 2

- (a) That greater links be developed with interested parties including the Civic Society and the Lancaster Archaeological and Historical Society.
- (b) That consideration be given to producing well-focused leaflets and the erection of information boards, particularly with regard to the Queen Victoria Statue and the Roman Bath House remains.
- (c) That the City Council support the Civic Society in revising the guide to Lancaster Cemetery and assist with publication and promoting the guided tours.
- (d) That the City Council utilise its consultation facilities to undertake a consultation exercise to ascertain public interest and raise awareness in the district's heritage which might provide a useful tool in developing proposals for the centenary.

RECOMMENDATION 3

- (a) That the programme of works from the Condition Surveys be given priority in the Capital Programme and that funding be made immediately available to start this important work.
- (b) That upon completion of this programme of works a rolling programme of maintenance for the historic buildings within the City Council's property portfolio be devised and that this programme should include painting.
- (c) That buddleia and other vegetation be removed from the buildings to reduce the possibility of further damage to the fabric of the buildings and this be managed within existing resources.

RECOMMENDATION 4

- (a) That the Charters of Lancaster be relocated to the Records Office in Preston for conservation, storage and safekeeping whilst ownership remains with the City Council, and enquiries be made with the Record Office as to the complimentary copies they would be prepared to produce.
- (b) That an application be made for heritage funding to produce copies of all of the City's historic charters for public display.
- (c) That the original 'Williamson Family Tree' currently stored in the Legal Services strong room be transferred to the Records Office for conservation,

storage and safekeeping and enquiries be made with regard to commissioning a copy for future display in Williamson Park, subject to the agreement of the Williamson Park Board.

- (d) That consideration be given to finding innovative means of funding a rolling repair programme for the oil paintings and other restorative works to non-fixed assets in Lancaster town Hall; including that a percentage of the hiring fees for the Banqueting Suite, Ashton Hall and tours of Lancaster Town Hall be channelled into a 'Restoration Fund.'
- (e) That an updated inventory and where appropriate, condition survey of the City Council's fixed assets be undertaken.
- (f) That attempts are made to exhibit more of the Council's assets including the relocation to, and display of, the Morecambe Music Festival silverware in Morecambe Town Hall.
- (g) That consideration be given to the future use/storage including the possibility of disposal of some items of furniture in view of the limitations on space within the town halls as a consequence of the Access to Services Review and that Department for Culture, Media and Sport (DCMS) guidance be followed in the event of any disposal.

RECOMMENDATION 5

- (a) That a regularly updated centralised records management system be developed with a central inventory to ensure consistency and reduce duplication.
- (b) That services identify which, if any records they consider need to be transferred to the Record Office and advise the Information Management Officer.
- (c) That the Information Management Officer engage with the County Archivist regarding records retention and arrangements for the transfer of agreed material to the Records Office and this be financed through service budgets.
- (d) That the Information Management Group be requested to ensure that each service revisits the current retention and disposal schedule to ensure records they hold are covered by it.
- (e) That all services are encouraged to dispose of documentation/records for which there is no longer a legal or viable need in conjunction with Corporate policy and, if need be seek clarification from the Information Management Officer.
- (f) That any important documentary records remaining in the town halls be relocated from the strongroom to a more suitable location.

RECOMMENDATION 6

- (a) That Cultural Services continues to raise awareness of the Museums Partnership and takes an active role in promoting the heritage of the district further.

4.0 ROLE OF TASK GROUP

4.1 Terms of Reference

1. To define a historical asset and establish whether there is a definitive list of the historical assets owned by the Council.
2. To establish whether an audit has been undertaken with regard to the assets that are most at risk – condition survey.
3. To ascertain service responsibility and the adequacy of current levels of maintenance of fixed assets including listed buildings, scheduled monuments, gardens and walls.
4. To establish service responsibility for the non-fixed assets and whether appropriate measures are in place regarding storage of charters and council records and how these are maintained for posterity; including the use of digital archiving.
5. To consider how the Council engages with outside bodies including the Civic Society and friends groups and what budgets are available to support this.
6. To ascertain whether the Council is promoting its assets and heritage to the best advantage and whether they are seen to be providing value to the community.

4.2 Membership

Councillors Rebekah Gerrard (Chairman), Susan Bray, Janie Kirkman, Geoff Knight, Ian McCulloch, Geoff Marsland, Sylvia Rogerson and Catriona Stamp with administrative support from Liz Bateson (Democratic Services)

The Task Group gratefully acknowledges the contributions and evidence freely provided by:

Bruce Jackson, County Archivist, Lancashire County Council
Heather Davis, Conservation Manager, Lancashire County Council
Phillip Bourne, Conservation Officer (Pictorial Art), Lancashire County Council
Paul Thompson, Museum's Manager North, Lancashire County Council,
David Shotter, James Price, Celia Norman, Rachel Newman (Lancaster Archaeological & Historical Society)
Roger Frankland and Winnie Clarke (Lancaster Civic Society)
Wendy Thompson, District Partnership Officer (Lancashire County Council)

Graham Cox, Head of Property Services
Stephen Gardner, Senior Conservation Officer
Caroline Thompson, Information Management Officer
David Owen, Head of Cultural Services
Steve Mann, Public Health & Safety Manager
James Doble, Democratic Services

4.3 Meetings

Date of meeting	Who gave evidence?	Focus of discussions
2.10.07	Graham Cox and Stephen Gardner	Agreement of work programme
20.11.07	Representatives from the Lancaster Archaeological & Historical Society and Civic Society and Paul Thompson (Museum's Manager North)	Suggestions as to what actions the Council could take to promote its heritage, particularly with regard to the fixed historical assets.
7.2.08	Graham Cox, Stephen Gardner and Paul Thompson James Doble	Service responsibility with regard to fixed assets, maintenance policies, budgets and possible external funding. Tour of Legal and Finance strong rooms at Lancaster Town Hall to observe storage facilities.
17.4.08	Bruce Jackson, (County Archivist) Heather Davis and Phillip Bourne (Conservation Centre, Preston) Paul Thompson and Stephen Gardner	Options for the future storage of the Charters, discussions regarding records retention and the condition of the oil paintings in Lancaster Town Hall
15.5.08	David Owen, Graham Cox, Stephen Gardner and Caroline Thompson	Records management and retention, maintenance policies in relation to non-fixed assets and discussions regarding Cultural Services role in promoting the district's heritage
4.9.08	Stephen Gardner and Liz Bateson	Consideration of Final Report

4.4 Site Visits

2.10.07	The Conservation Officer and Head of Property Services accompanied task group members on a tour incorporating many of the historic buildings for which the City Council is responsible. This included the scheduled monument at Vicarage Fields.
4.3.08	Members visited the Conservation Centre and the Records Office

in Preston. Heather Davis (Conservation Manager) provided task group members with an insight into the work undertaken at the Conservation Centre. Bruce Jackson (County Archivist) provided a tour of the Records Office and an outline as to the records and documents located there.



Members visited the Conservation Centre at Preston where the Roman Tombstone which was discovered in Lancaster in 2005 is currently located

4.5 Documentary Evidence

Stephen Bull, *Triumphant Rider – The Lancaster Roman Cavalry Tombstone*, Lancashire Museums, 2008

Pape, T , *The Charters of Lancaster City Council*, Lancaster City Council, 1952

‘Scheduled Monuments – a guide for owners and occupiers’, *English Heritage*, May 2004

‘The Past in Cornwall’s Future’ - Report of the Single Issue Panel Inquiry on Heritage Policy, *Cornwall County Council*, January 2003

‘Valuing our heritage – Investing in our future – Our Strategy 2008-2013’, *Heritage Lottery Fund*

‘It’s Your heritage – 10 years of Heritage Funding in the North West’, *Heritage Lottery Fund*

‘Historic Towns and Cities in England’s Northwest ‘- Position Statement, *NWDA & English Heritage*, March 2007

'Lancashire Historic Town Survey Programme – Lancaster', *Lancashire County Council and Egerton Lea Consultancy*, February 2006

'Lancashire Historic Town Survey Programme – Morecambe', *Lancashire County Council and Egerton Lea Consultancy*, February 2006

'Lancashire's Historic Environment', *Lancashire Structure Plan 2001-2016*, p.72

'Display of Arts and Collections – Celebrating our Cultural Heritage', *Scrutiny Commission 1, North East Lincolnshire Council*, September 2002

'Advice to owners and occupiers of listed buildings', *Lancaster City Council*, Planning and Building Control Service

'Castle & Quay Conservation Area Management Plan', *Lancaster City Council*, 'adopted Version July 2005

'Lancaster Urban Archaeology Database' Report to Cabinet by Head of Planning Services, *Lancaster City Council*, 1st May 2008

'Managing Local Authority Heritage Assets – Some guiding principles for decision-makers', *English Heritage*, June 2003

'Using the past to shape the future', *Public Servant*, April 2008, p.47

Local Newspaper articles

Lancaster Guardian 6.4.07 - 'Dirty Old town is failing us all' - letter page.6

Websites

'Heritage lottery grant award to reveal Cardiff's hidden treasures', 'External work completed on castle', Conservation of the built environment'
<http://www.cardiff.gov/content.asp>

www.thevisitor.co.uk/towncrier 'Does the Clock Tower reflect the sign of our times?' published 1st August 2007

www.thevisitor.co.uk/moretopnews 'Clock Tower in need of repair, 1st August 2007

www.hlf.org.uk

www.priorylancs.ac.uk

www.ashtonorgan.musicnw.co.uk/ashton_organ/index.shtml

www.nwda.co.uk/publications/infrastructure/historic-towns-and-cities-in-1.aspx

www.helm.org.uk/server/show/nav.7728

5.0 STATUS OF THE REPORT

This report is the work of the Council Assets Task Group, on behalf of the Overview and Scrutiny Committee, and where opinions are expressed it should be pointed out that they are not necessarily those of Lancaster City Council.

While we have sought to draw on this review to make recommendations and suggestions that are helpful to the Council, our work has been designed solely for the purpose of discharging our terms of reference agreed by the Overview and Scrutiny Committee. Accordingly, our work cannot be relied upon to identify every area of strength, weakness or opportunity for improvement.

This report is addressed to the Cabinet of Lancaster City Council for whom it has been prepared. The Task Group take no responsibility for any Member or Officer acting in their individual capacities or to other third parties acting on it.

6.0 BACKGROUND AND CONTEXT

The Overview and Scrutiny Committee agreed to establish the Council Assets Task Group at a meeting on 11th July 2007 although it was agreed to defer the commencement of the task group until services could allocate resources to this project, the first meeting being held on 2nd October 2007. The idea for the task group came from concern expressed by Councillors, Officers and members of the public with regard to the condition of the Council's listed historic buildings and fixed assets including the Queen Victoria Statue, war memorials, walls, Morecambe Clock Tower and Scheduled Monuments. There was also concern at the condition of the historic non-fixed assets including paintings, water damage to furniture and the location and storage of the City Council's Charters and records.

With six prehistoric sites and twelve Roman sites within the defined urban area of Lancaster alone this district is steeped in history and areas of historical interest. This is recognised by a letter published in the Lancaster Guardian in April 2007 submitted by a Lancastrian now residing in Italy which refers to the City's 'rich military, religious, civic and architectural heritage.' However the letter suggests that the historic buildings are, 'cloaked in an unpleasant cocktail of soot and grime' and that a tourist would have to 'strain his eyes to pick out the features of these beautiful buildings.' This is contrasted rather sharply with the historical buildings in York which the reader is advised 'positively glows and sparkles.'

Initially the task group intended to consider the Council's fixed assets prior to moving on to the non-fixed assets with the possibility of two reports. However as the work of the task group made progress it became apparent that it would be more effective to produce one report which includes a number of recommendations which could be implemented in the short term as well as highlighting areas where future work could be warranted if and when resources permit.

For the purpose of this report, the task group have primarily focused on the buildings that are likely to remain within the City Council's property portfolio. However the task group do not agree that the cosmetic maintenance of the buildings which are likely to be sold including Palatine Hall and St Leonards House should be entirely discounted as will become apparent in the report. The task group are of the opinion that the task of encouraging residents to take pride in the district's distinct heritage is made all the more difficult if the City Council itself is not perceived to be a caring property owner.

What is a listed building?

In the Lancashire Historic Town Survey Programme assessment of Lancaster in 2006, Lancaster with over 300 listed buildings is referred to as 'a town with one of the most notable architectural legacies in North West England.' The City Council's property portfolio contains a number of listed buildings which are categorised as follows:

- Grade I** buildings of national or international importance, or fine little altered examples of some particular period, style or building type: e.g. Lancaster Castle, Ashton Memorial
- Grade II*** buildings of regional or more than local importance, or major examples of some period, style or building type which may have been altered,

e.g. Queen Victoria Statue, Lancaster Town Hall, City Museum, Maritime Museum

Grade II buildings of local importance and special interest which warrant efforts to preserve them, e.g. Assembly Rooms, Cottage Museum, Covell Cross, Garden of Remembrance – War Memorial

What is a Scheduled Monument?

The City Council's historic heritage also includes several Scheduled Monuments. Scheduling is the legal system for protecting nationally important archaeological sites in England in order to preserve significant examples of the archaeological resource for the educational and cultural benefit of future generations. The City Council is responsible for the glass melting and annealing workshop which was part of Shrigley and Hunt's stained glass manufacturing workshops at Castle Hill as well as the Vicarage Fields site. The Vicarage Fields site was given to the City Council by the Priory Church as an open space for recreation and for the use of the citizens of Lancaster. Suggested maintenance of scheduled monuments is through sympathetic land use – e.g. control of erosion or vegetation growth.

Planning Policy Guidance

The City Council has a moral and legal responsibility to maintain and repair the historic buildings for which it is responsible. Planning Policy Guidance PPG15 'Planning and the Historic Environment' advises authorities to 'deal with their own buildings in ways which will provide examples of good practice to other owners.' In a leaflet entitled 'Advice to owners and occupiers of listed buildings' produced by the City Council's Planning and Building Control Service, it states 'the preservation of historic buildings requires their regular maintenance and timely repair. Expenditure on routine maintenance and repairs can avoid the need for more expensive work caused by their neglect.' Therefore adequate maintenance in the listed buildings outside of the Council's property portfolio is actively encouraged and indeed enforced. However during the site visits undertaken by members of the task group and from the evidence gathered by the task group it appears that a number of the City Council's historical assets have suffered through the lack of investment and maintenance over a long period of time.

Non-Fixed Historic Assets

With regard to non-fixed historic assets the City Council possesses a great many items of historical interest, many of which have been bequeathed to the Council, many of which form an integral part of the buildings. In addition to a substantial amount of Waring and Gillow furniture, a great deal of which was designed specifically for Lancaster Town Hall, the Council has ownership of a number of oil paintings depicting former local dignitaries, as well as a considerable collection of silverware and manuscripts of great historical importance, most notably the Charters of Lancaster. The rationale for the task group included concern that these assets were not receiving appropriate maintenance or were not being displayed or promoted to the best effect.

The task group were also aware that the Access to Services Review is likely to have a significant impact on future opportunities for storage and a number of the task group's recommendations have been made with this in mind.

Next year Lancaster Town Hall and Williamson Park will be celebrating their centenary.

Lancaster Town Hall (right) was designed by E W Mountford, who also designed the Old Bailey in London. The town hall opened in December 1909 and the project which also included the redevelopment of Dalton Square and the erection of the Queen Victoria Statue was financed by Lord Ashton to the value of £155,000.

In the 'Historic Towns and Cities in England's Northwest' a position statement published in March 2007, the consultants commissioned by the Northwest Regional Development Agency (NWDA) and English Heritage outlined their vision for Lancaster to 'build on its Georgian heritage to position itself as the **Bath of the North.**' (The position statement can be downloaded from the NWDA website).

The forthcoming centenary appears to be an opportune time to reflect on the district's unique heritage, recognise the need to provide a more positive image for visitors and ensure that appropriate measures are in place to protect this heritage for future generations.



7.0 FINDINGS

FIXED ASSETS

For the purposes of this report the term fixed assets is used to describe the listed buildings, scheduled monuments, walls, gardens, and memorials for which the City Council is responsible.

The task group have noted the various sources of External Funding which are available for heritage projects provided that various criteria are met. A number of Councils have successfully used their heritage to assist with regeneration projects including Glasgow with the Merchant City Project and Cardiff with the Bute Park restoration and Liverpool.

7.1 External Funding

Since being established in 1994 to provide grants to local, regional and national heritage projects the Heritage Lottery Fund (HLF) has awarded £4b to more than 26,000 projects in the UK. 1400 grants worth £325m were awarded to projects in the North West in the first 10 years since the inception of the HLF. Between 2003 and 2007, 97 projects in Blackpool, Bolton, Halton, Knowsley and St Helens have shared £13m of heritage funding.

In a recent article published in 'Public Servant', Dame Liz Forgan, Chairwoman of the HLF referred to the 'drain of funding' created by the London Olympics which was likely to reduce HLF by £161m. However the HLF would still have approximately £1.9billion to invest over the next 12 years and the task group would like to see some of that funding earmarked for this district.

An indication of the heritage grants available is detailed below.

It appears that listed building (Grade I or II*) are only considered by English Heritage for possible grant aid if they are regarded as 'at risk.' A register of Buildings at Risk is published annually. None of the City Council's Grade I or II* listed buildings are currently considered to be at risk. Grade II listed buildings are not eligible for any grant aid from English Heritage.

Heritage Lottery Fund incorporates a number of grant giving programmes including **Awards for All** (£300 - £10,000 in England). Local groups including small community groups and parish/town councils can apply for an 'Awards for All' grant which aims to 'widen the appreciation and understanding of heritage' and 'encourage local communities to participate in heritage activities.'

Your Heritage (£5,000 - £50,000) aims to support community-focused heritage projects. To qualify for funding the projects needs to 'conserve and enhance our diverse heritage or encourage communities to identify, look after and celebrate their heritage.'

Heritage Grants (£50,000) aim to 'conserve and enhance our diverse heritage, or encourage more people to be involved in their heritage or both.'

Townscape Heritage Initiative - This helps regeneration of historic parts of towns and cities; particularly in areas of social and economic need. A first stage bid for a

THI in Morecambe 'A View for Eric' has been successful and is now proceeding to stage 2. If successful the scheme will commence in April 2009. Morecambe's regeneration benefitted from a £10m THI which ran from 2003 to 2007 with the Midland Hotel and St Lawrence's Church being granted extensions in 2007/08 as critical THI projects.

Parks for People (£250,000 to £5m) - A joint initiative between Heritage Lottery Fund and the Big Lottery Fund, grants are made to help with restoration and regeneration of public parks, gardens, squares, walks and promenade. An application is due to be submitted for Williamsons Park, Lancaster. The proposal will include an audience development plan, landscaped conservation plan along with other suggestions which might enable the Park to secure the status of 'horticultural excellence'

It has been suggested that the walled garden and Queen Victoria monument in Dalton Square, Storey garden and the landscaped area at Castle Park (castle ditch) may be eligible for grant aid.

Landscape Partnerships (£250,000 - £2m) - Aimed to help promote heritage conservation as an integral part of rural regeneration and to support schemes which aim to conserve areas of land which have a distinct local landscape character recognised and valued by local people. The Vicarage Fields and Castle Hill area may be eligible.

War Memorials Trust / Grants for War Memorials (£500-£10,000) - English Heritage and the Wolfson Foundation in association with the War Memorials Trust provide grants for the repair and conservation of free standing war memorials in England. The type of work which can be funded includes repairs to fabric including structural stabilisation, re-cutting and re-carving eroded inscriptions and re-lettering, re-leading and re-gilding.

A Monument Stability Report in 2005 found the Crimean War Memorial to be 'within acceptable limits.' However the task group have been informed that the Grade II War Memorial in Morecambe is in poor condition and the lettering requires replacing. There is a possibility that this could be eligible for funding. There is also Small Grants Scheme funded by the War Memorials Trust for funding up to £1500.

As will become apparent in the next section of this report, an application was made by the Lancaster Archaeological and Historical Society for lottery funding for the Vicarage Fields site. Criterion for applying for most of the above-mentioned grants appears to involve conserving, enhancing and encouraging greater involvement in heritage. This is supported by the following quotation from the Chairwoman of the Heritage Lottery Fund.

“The idea that museums are musty and that heritage is stately homes or natterjack toads – ie for nutters, dukes or other minority groups – is crumbling at long last. Heritage is whatever people care enough about to keep for the future, with a couple of rather important conditions. One is that it must show how it is sustainable economically for the foreseeable future and the other is that the people who are proposing a heritage project should be able to demonstrate how they will share their enthusiasm with people who aren't already in the club... If you love cathedrals that's great, but you have to show us how you make an effort to make them understandable and attractive to people who don't. That is actually a terrifically good prod to people who own and love heritage things to use their imagination and think about what it is they love about heath land or historic railways, and how to communicate that passion to other people.” (Dame Liz Forgan, Chairwoman HLF from 'Public Servant', April 2008)

Whilst the City Council has benefitted from some heritage funding as illustrated above, it has proved difficult to ascertain what applications have been made and how successful these applications have been particularly since the responsibility for the district's heritage resides with various services. The task group would like to see a more co-ordinated approach to applying for external funding and would recommend that this be Director-led.

The task group regard the approaching centenary of Lancaster Town Hall as providing an opportunity to explore the possibility of seeking funding for heritage projects as well as an opportunity for the Council to offer support to community groups who have taken an interest in the district's heritage.

The task group note that prior to the Lancashire County Museum Service assuming responsibility for the management of the Museum Service in 2003, the Town Hall and Roman Bath House had been registered as Museums along with the City, Maritime and Cottage Museums. This gave all the sites Museum status and opened up avenues of grant funding. At a similar period to the management transfer the standards of museum registration changed. This new phase became museum accreditation. Accreditation had much stricter criteria and higher standards therefore the Bath House and Town Halls would not be eligible for this standard. Coupled with this the Bath House and the responsibility of the two Town Hall's collections remained with the City.

The task group note that the Roman Bath House has been de-registered; there is no question that this could become an accredited museum in its present state. It is important to note the comments of the accreditation assessor in reference to the Town Hall collections:

“Please could you take the above case off the agenda for next week’s panel meeting. De-Registration for Rd No Lancaster Roman Bath House is straightforward and I will use the opportunity of notifying Lancaster City Council of the panel’s decision and raising the issue of the Town Hall. There are substantial collections, including archives, at the Town Hall but with no professional curatorial input into their care. The management of the collections and displays at the Town hall did not pass to Lancashire County Council at the time that agreement was made regarding the rest of the City service. I am hoping that opening the dialogue through de-Registration of the Bath House will result in renewed attention on this anomalous situation towards reaching a solution.”

Deborah Skinner BA AMA PGCHE Consultant Accreditation Assessor

The task group agree that the issue of someone taking "ownership" of these heritage assets is important. Whilst the task group would support Director level ownership of heritage funding applications, the task group would also suggest that this concept be taken a step further with a Director assuming overall responsibility for Heritage. The idea of a 'Heritage Champion' either the Cabinet portfolio holder or a chief officer is endorsed in guidance produced by English Heritage entitled: 'Managing Local Authority Heritage Assets – Some guiding principles for decision-makers.' Extracts of this guidance are attached as Appendix 1

RECOMMENDATION 1

- (a) That a co-ordinated approach for applying for external funding for heritage projects be developed and led by an appropriate Director, such as the Corporate Director (Regeneration), with consideration given to identifying heritage projects which would meet the criteria for external funding and engaging with/supporting community groups who take an interest in promoting the district's heritage.
- (b) That the 'appropriate' Director assumes overall responsibility for Heritage.
- (c) That Cabinet considers appointing a 'Heritage Champion'; either the Cabinet portfolio holder or a chief officer as endorsed in the guidance produced by English Heritage

7.2 Engagement with interested parties

Representatives from the Lancaster Archaeological and Historical Society (LAHS), Lancaster Civic Society and Lancashire County Museums were invited to share their views with the task group with regard to the Council's fixed historical assets. The district is fortunate to continue to attract the interest of a number of committed, enthusiastic individuals who use their knowledge and skills to promote the district's heritage. The attendees provided the task group with an indication of their particular areas of interest as well as a number of suggestions as to how the City Council could promote further its distinct heritage. The task group members found these discussions to be extremely valuable. Discussions included the City Museum, Vicarage Fields, Urban Archaeology Database, the Queen Victoria Statue, and Lancaster Cemetery.

City Museum

Concern was raised at the condition of the fabric and the back log of repairs of the listed buildings in the ownership of the City Council, with the state of repair and decoration of the City Museum singled out for particular censure. Under the terms of the Museums Partnership which was formally agreed by Full Council in January 2003, ownership and therefore responsibility for the City buildings and collections remained with the City Council whilst the museum staff transferred to Lancashire County Council. Whilst it was recognised that maintenance budgets were limited it was noted that the poor state of repair and decoration did not provide a good impression to visitors and was indicative that decoration was perceived as a luxury rather than a necessity. ***(Maintenance is discussed in further detail in 7.3)***

Vicarage Fields – Scheduled Monument

During discussions with members of the Lancaster Archaeological and Historical Society it was made apparent to the task group members how rare it was for a City to retain both Roman and Medieval earthworks in tact readily available to be seen. The Roman remains include a fragment of wall known as the Wery Wall on the eastern slope of Castle Hill, adjacent to the rear of Mitre House which represents a section of a bastion of the last Roman fort on the site which is believed to date back to the 4th century. The visible earthwork rampart in Vicarage Field consists of a thick mound of black earth and is believed to be connected with the Priory or Castle.

In 1973 the remains of a small roman bathhouse were excavated adjacent to the Wery Wall. Property Services are responsible for the maintenance of the Bath House which is in poor condition and this is acknowledged in the Adopted version of the Castle and Quay Conservation Area Management Plan (July 2005). The Plan suggests that 'appropriate measures are required to protect and enhance these valuable resources, both now and in the future.' Furthermore the Plan refers to the 'significant potential to enhance this important heritage asset' with the following short to long term measures:

- Creating better interpretation at the location which may include small sensitively designed information boards or even a purpose built structure in situ to protect and present the scheduled monument
- Creating a more accessible, safer environment by improving the access point, surface of path and lighting on site
- Improving the links from the Castle and the quay to this monument.



Photograph of Roman Bath House remains - reproduced with the permission of P. Mullineaux - www.priorylancs.ac.uk

The task group have obtained a copy of a proposal produced by the Young Archaeologists' Club Lancaster (YAC) to 'adopt' the Bath House. The YAC consist of youngsters aged between 8 and 16 years. Their proposals include:

- Consult English Heritage (as the site is a scheduled monument) and professional archaeologists in the region
- Keep the monument clear of rubbish
- With expert advice, prevent the site from becoming overgrown with weeds and other invasive plants
- Work on new interpretation of the site – the current board is a number of years old and deserves an upgrade
- Promote the site through various media

The YAC proposals refer to engaging the local community in this project. Rationale for the work is expressed in the following extract: *'If the city does not maintain and*

promote these resources then they will no longer be available for local community or tourist engagement. As a rule, people visit places because of their attractions and if the attractions are not there then the city no longer has those resources to offer and it loses what makes the place unique.' The YAC have already participated in removing rubbish from the area.

The task group welcome the interest which the YAC have expressed in the Bath House and recognise the importance of generating and encouraging interest in the district's heritage amongst young adults. The task group would endorse the following statement from the YAC proposal: *'It is not just about the past, it is about the present and the people that engage with Lancaster. The bath house is just one means of fostering a sense of place, belonging and identity.'*

The task group were informed that the Lancaster Archaeological and Historical Society had submitted an application for lottery funding to undertake survey work in the Vicarage Fields area but this had not been successful. It was suggested that if some improvements to the condition of the site were made it might deter further incidents of antisocial behaviour and the task group members saw evidence of vandalism and anti-social behaviour during their earlier site visit which included that area of the City. The task group were advised that the application was rejected because it had failed to engender enough community links but a further application might be treated more favourably if the project was able to reveal evidence of community engagement. The task group were of the opinion that the Council with the networking and consultation tools at its disposal would be able to assist with generating interest in this project, and thereby hopefully improve the likelihood that that any subsequent application would be successful.

Since discussions with the representatives from the LAHS the task group have been advised that the Conservation Officer has received a written communication from the LAHS expressing concerns regarding the condition of the Bath House. The letter asked the question as to *'how long can this state of affairs be allowed to continue before radical measures will have to be considered?'* The radical measure being to back-fill the site and return it to grass which in their opinion would be *'a great pity, especially since the recent discovery of the Cavalry Tombstone'* which *'serves to emphasise the importance of Lancaster in the Roman scheme of things in the north west.'* **(A copy of this letter is attached in Appendix 1.)**

Urban Archaeology Database

The task group were reminded of the discovery of the Roman tombstone in November 2005 in Lancaster, an indication that there may indeed be further assets of historic importance which have yet to be revealed. The tombstone was purchased by the Museums Service with the assistance of funding from the Haverfield Trust, V&A MLA and Heritage Lottery. The task group had the opportunity to observe the tombstone which is estimated to date from 75 to 125 AD during their visit to the Conservation Centre in Preston where the tombstone is currently undergoing some restorative work before it returns to Lancaster where it will be displayed in the City Museum. This photograph was taken during the site visit to the Conservation Centre.



The tombstone is believed to be that of a roman trooper of the Ala Augusta Cavalry unit.

During discussions a great deal of criticism was made regarding the development of the City Centre in the 1960s and 1970s. The Conservation Officer confirmed that procedures were now in place through the planning process to ensure that any future developments were sensitive to historical assets and an Urban Archaeology Database was being developed which would provide an important tool for early consultation between planners, developers and archaeologists. Since these discussions a report detailing the offer of £43,000 in grant aid from English Heritage to fund this database has been considered by Cabinet.

Queen Victoria Statue

Stakeholders were invited to suggest ways in which the City Council could publicise its heritage further. One suggestion related to the Grade II* listed **Queen Victoria statue** located in Dalton Square.

The Victoria Statue was gifted to the town by Lord Ashton in 1907. The monument was sculpted by the well-respected Edwardian Sculptor, Herbert Hampton. The panels feature eminent Victorians including Florence Nightingale and the Lancaster-born pioneer of science, Richard Owen. The statue is recognised as being of national importance and sadly in recent years has been subjected to occasional incidents of vandalism. The possibility of an information board with details of those featured in the panels was suggested as this could help engender interest in both local and national history. There is concern that this Grade II* listed structure is deteriorating.



Lancaster Cemetery

Reference was also made to Lancaster Cemetery which is listed on the Register of Parks and Gardens of Special Historic Interest in England and contains three Grade II listed chapels designed by Austin and Paley. Concern at the state of repair of these chapels which are no longer in use was highlighted in the Cemeteries Task Group report in 2006. In addition to the chapels the cemetery contains the Grade II Crimea Monument as well as a Grade II listed Cemetery Lodge.

Roger Frankland, who provides Civic Society tours of this cemetery highlighting notable local historical figures who have been interred there, commended the City Council on the recent improvements with regard to the headstones and paths. It was suggested that more use for recreational purposes could be made of this historic asset and the Civic Society has produced a guide to the cemetery but agreed that it could be revised. The Civic Society indicated that they would be willing to undertake this revision and the task group recommends that the City Council provides some support with regard to printing and publicity of the guided tours.

During these discussions with the LAHS, Civic Society and Museums Partnership it became apparent to the task group of the need to forge better community links and encourage greater awareness of the district's heritage and this could be facilitated through efforts to ensure the public and visitors are better informed of the historical

assets. This could be achieved through producing well-focused leaflets and erecting information boards. Furthermore the City Council could use its consultation facilities to obtain public opinion and ideas and a consultation exercise might actually help raise awareness in the City's heritage which might be useful with regard to developing proposals for the forthcoming centenary. A MORI poll commissioned by the 'History Matters – pass it on' campaign in 2006 revealed some interesting results: 73% of those polled (a representative sample of 1030 adults 16+) expressed an interest in history while just 59% expressed an interest in sport in general with 48% expressing an interest in football! These figures (which of course might be disputed by football fans) were welcomed by the Director-General of the National Trust who maintained: *'At a time when the excitement and drama of sport has captured the nation's imagination, it is truly impressive that history more than held its own ... history has deep-rooted and fundamental appeal and is valued by millions of people.'* The task group agree that it would be a useful exercise to gauge the views of the district's residents and visitors.

RECOMMENDATION 2

- (a) That greater links be developed with interested parties including the Civic Society and the Lancaster Archaeological and Historical Society.
- (b) That consideration be given to producing well-focused leaflets and the erection of information boards, particularly with regard to the Queen Victoria Statue and the Roman Bath House remains.
- (c) That the City Council support the Civic Society in revising the guide to Lancaster Cemetery and assist with publication and promoting the guided tours.
- (d) That the City Council utilise its consultation facilities to undertake a consultation exercise to ascertain public interest and raise awareness in the district's heritage which might provide a useful tool in developing proposals for the centenary.

7.3 Maintenance of Fixed Historic assets

The importance of maintenance is highlighted in the guidance produced by English Heritage previously referred to and included in Appendix 1. The guidance maintains that *'planned maintenance and repair programmes are essential for all heritage assets, and should be based on regular, detailed inspections and condition reports.'* **(A copy of this is attached as Appendix 2).**

The task group were advised that a condition survey undertaken in 2006 revealed that the Council's property portfolio was in a poor condition with an estimated backlog of repairs in the region of £5.65m among the Council's properties which had been identified for longer term ownership. Funds have been allocated in the capital programme over a 5 year period and the task group were informed that work was being tendered for those areas where the worse safety elements appear.

An indication of the buildings identified for maintenance, estimated costs together with service responsibility is provided in the table below.

Lancaster City Council - Historic Assets - January 2008

<u>Building/ Property/ Monument</u>	<u>Service with Responsibility Property Services</u>	<u>Outcome of Backlog of Repairs Survey and additional information</u>	
LANCASTER			
Dalton Square:			
Lancaster Town Hall - Grade II*	Property Services	£2,357,977	Part of 5 year capital programme and linked to Access to Services Review (ATSR) improvements
Computer Block - Former Fire Station - Grade II	Property Services	£277,117	Part of 5 year capital programme and linked to (ATSR) improvements
Garden Of Remembrance - War Memorial - Grade II	Property Services / City Council (Direct) Services	£0	
Balustrade Walls - Grade II	Property Services/ CC(D)S	No survey undertaken	
Condition Of Railings, Gates etc	Property Services/ CC(D)S	No survey undertaken	
Queen Victoria Monument - Grade II	CC(D)S	£0	
Balustrade Wall To Garden - Grade II	Property Services/ CC(D)S	No survey undertaken	
Palatine Hall - Grade II	Property Services	£310,456	Property to be sold as part of ATSR. Minimal maintenance will be undertaken.
1 Dalton Square - Grade II	Property Services	£89,642	Property to be sold as part of ATSR. Minimal maintenance will be undertaken.
4 Dalton Square - Grade II - (Now - CityLab)	Property Services	£0	Newly refurbished and day to day repairs met from existing revenue budgets
5 Dalton Square - Grade II - (Now - CityLab)	Property Services	£0	Newly refurbished and day to day repairs met from existing revenue budgets
Market Square:			
City Museum - Grade II*	Property Services	£75,650	Part of 5 year capital programme.
King Street:			
Assembly Rooms - Grade II	Property Services	£23,035	Part of 5 year capital programme.
Meeting House Lane:			
Walls and Steps to Storey Garden - Grade II	Property Services / CC(D)S	No survey undertaken	
Gate Piers - Grade II	Property Services / CC(D)S	No survey undertaken	
Castle Hill:			
Tourist Information Centre - 29 Castle Hill - Grade II	Economic Development & Tourism Service	£41,702	Property to be sold when TIC function transfers to Storey Institute CIC

Storey Institute	Property Services	£0	Currently undergoing refurbishment and will then transfer to the Storey Board who will be responsible for all future maintenance.
Storey Institute Gateway - Grade II	Property Services	Included within Storey Institute	As above
26 Castle Park - Grade II	Property Services	Included within Storey Institute	
Walls and Pillars - Garden on the Site of the Castle Ditch - Grade II	Property Services	No survey undertaken	As above
Former Shrigley & Hunt Glass Melting & Annealing Works-Sched.Monument	Property Services	No survey undertaken	
Cottage Museum - Grade II	Property Services	£4,385	
7 and 9 Castle Hill	Property Services	No survey undertaken	Included in HRA estate and part of their maintenance programme.
Covell Cross - Grade II	Property Services	No survey undertaken	
Steps Priory Churchyard - Grade II	<i>N/A - Not Lancaster City Council</i>	N/A	
Priory Churchyard Amphitheatre - Not Listed	CC(D)S	No survey undertaken	
<u>Vicarage Lane to St. Georges Quay:</u>			
Roman Bath House/ Vicarage Fields. Scheduled Monument	Property Services / CC(D)S	No survey undertaken	
Quay Wall - Grade II	Property Services	No survey undertaken	
Maritime Museum - Grade II* and Adjoining Warehouse - Grade II	Property Services	£63,177	Part of 5 year capital programme.
<u>St. Leonard's Gate:</u> St. Leonard's House - Grade II	Property Services	£315,738	Part of 5 year capital programme – linked to ATSR improvements
<u>Quernmore Road Cemetery:</u> Crimea Monument - Grade II	Health & Strategic Housing	No survey undertaken	Part of 5 year capital programme.
Cemetery Lodge - Grade II	Health & Strategic Housing	£20,835	
Eastern Mortuary Chapel Non Conformists - Grade II	Health & Strategic Housing		Survey indicates that the costs are outside those identified in the capital programme. Further investigation required.
Northern Mortuary Chapel Roman Catholics - Grade II	Health & Strategic Housing		Part of 5 year capital programme – first phase.
Western Mortuary Chapel C of E - Grade II	Health & Strategic Housing		Part of 5 year capital programme – first phase.
<u>Williamson Park:</u> Gate Piers, Gates and Walls to the Park Quernmore Road - Grade II	Williamson Park Ltd/ CC(D)S	No survey undertaken	The lease to Williamson Park Ltd passes responsibility for maintenance to the Park Co.

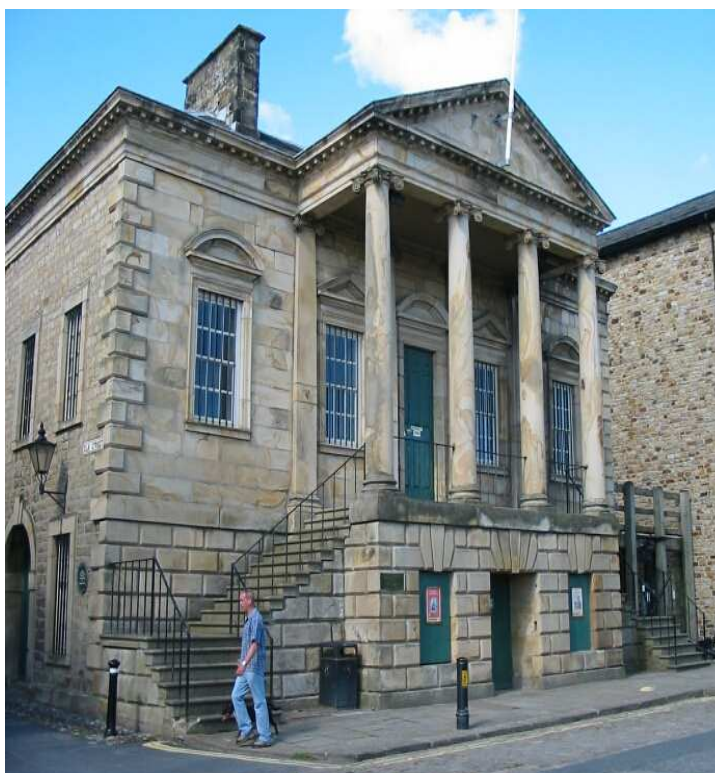
Lodge Quernmore Road - Grade II	Williamson Park Ltd	No survey undertaken	The lease to Williamson Park Ltd passes responsibility for maintenance to the Park Co..
Gate Piers, Gates and Walls to the Park - Wyresdale Road - Grade II	Williamson Park Ltd / CC(D)S	No survey undertaken	The lease to Williamson Park Ltd passes responsibility for maintenance to the Park Co.
Lodge Wyresdale Road - Grade II	Williamson Park Ltd	No survey undertaken	The lease to Williamson Park Ltd passes responsibility for maintenance to the Park Co.
Palm House - Grade II	Williamson Park Ltd / Property Services	£7,601	The lease to Williamson Park Ltd passes responsibility for internal maintenance to the Park Co., exterior remains with the City Council
Bridge Over Ornamental Lake - Grade II	Williamson Park Limited	No survey undertaken	The lease to Williamson Park Ltd passes responsibility for maintenance to the Park Co.
Temple Shelter	Williamson Park Ltd / CC(D)S	No survey undertaken	The lease to Williamson Park Ltd passes responsibility for maintenance to the Park Co.
Ashton Memorial - Grade I	Williamson Park Limited	£27,084	
<u>Ryelands Park:</u> Ryelands House - Grade II	Property Services	£71,138	Part of 5 year capital programme – property likely to be transferred to Health Auth. With maintenance responsibility passing with the property
<u>Moor Lane:</u> Moor Lane Mills South - Grade II	Property Services	No survey undertaken	Property let on full repairing basis
Dukes Theatre - Grade II	Property Services	£14,558.49	Part of 5 year capital programme
<u>MORECAMBE</u>			
War memorial - Grade II	Property Services	£218	Part of 5 year capital programme
Clock Tower - Grade II	Property Services	£3,588	Part of 5 year capital programme
Town Hall - Grade II	Property Services	£1,060,636	Part of 5 year capital programme and linked to Access to Services Review (ATSR) improvements
Former Station Building	Property / Cultural / Economic Dev. & Tourism Services	£61,134	Part of 5 year capital programme
Lighthouse - Stone Jetty	Planning Services (Former Engineers) - Lighthouse Light. Property Services Lighthouse Structure / Building	No survey undertaken	Stone masonry has been repointed and external painting carried out

The task group were initially advised that the majority of these outstanding works should be completed within the 5 year programme with maintenance programmes devised for the retained properties. However, members of the Task Group are aware that during the course of the work of the Group, there has been a lack of funding for the capital programme that has resulted in a significant delay in undertaking works and it is now no longer possible to complete the works in the original 5 year period.

This is a serious cause for concern as during the summer of 2008 there has been a noticeable deterioration in the condition of some buildings. In particular, Lancaster Town Hall has suffered a number of collapsed ceilings which require immediate replacement. The failure of this building element has required rooms to be vacated and occupiers to be moved to other offices with the disruption that this causes.

The task group noted that there is a risk that conditions of the premises may deteriorate further during this intervening period resulting in the requirement for further funds and this is now being proved to be correct. Making funding available for the backlog of repairs is now an urgent requirement, whilst an interim condition survey is recommended in order to identify the deterioration that is being experienced and to inform and update the budgetary position

The Maritime Museum, St George's Quay – formerly the Custom House designed by Richard Gillow and completed in 1764. The maintenance of this Grade II* historic building is financed from a 5 year capital programme with over £63,000 being allocated for this purpose which in theory should include some provision for painting of woodwork. However delays in obtaining capital receipts has led to a delay in progressing this work and the likelihood that 'essential' maintenance costs will increase thereby reducing the money available for the more 'cosmetic' maintenance.



The task group have also noted that a number of these fixed historic assets have not been included in the survey including balustrades, gate piers and posts. The task group have been advised that these do not fall within the remit of Property Services budgets and that further work is required to assess their condition and identify any necessary maintenance if Council are minded to regard this as a priority.

In accordance with the guidance issued by the former ODPM with regard to Asset Management Plans, Property Performance Indicators are prepared to show the condition of the Council's buildings in categories A-D (A is good) and categories 1-3 (1 is urgent).

<i>PPI 1A - % Gross internal floor space in condition A-C</i>	<i>A (is good)</i>	<i>19.65%</i>
	<i>B</i>	<i>40.94%</i>
	<i>C</i>	<i>38.21%</i>
	<i>D</i>	<i>1.21%</i>
<i>PPI 1B – Backlog of maintenance by cost expressed as I) total value</i>	<i>1</i>	<i>£ 1,976,682</i>
	<i>2</i>	<i>£3,769,553</i>

	3	£ 2,138,994
II) a priority in levels 1-3	1	35.07 %
	2	47.81 %
	3	27.13 %

The table above illustrates that less than 20% of the gross internal floor-space within the Council's buildings have been classified as good. Moreover over 35% of the backlog of maintenance at an estimated cost of £ 1,976,682 is perceived as urgent. The task group note that Lancaster Town Hall has the largest backlog of outstanding works and although efforts have been made to reduce this with increased budgets, those budgets are not currently funded. An interim condition survey is being undertaken which will undoubtedly result in increased costs and confirmation of further deterioration in some areas of the buildings.

Extracts from the Corporate Property Strategy 2005 (due for renewal in 2008), indicate that the maintenance programme is suffering from a backlog of work as a direct result of under-funding in previous years and as a result of this maintenance has often been reactive with basic maintenance put into abeyance, e.g. painting.

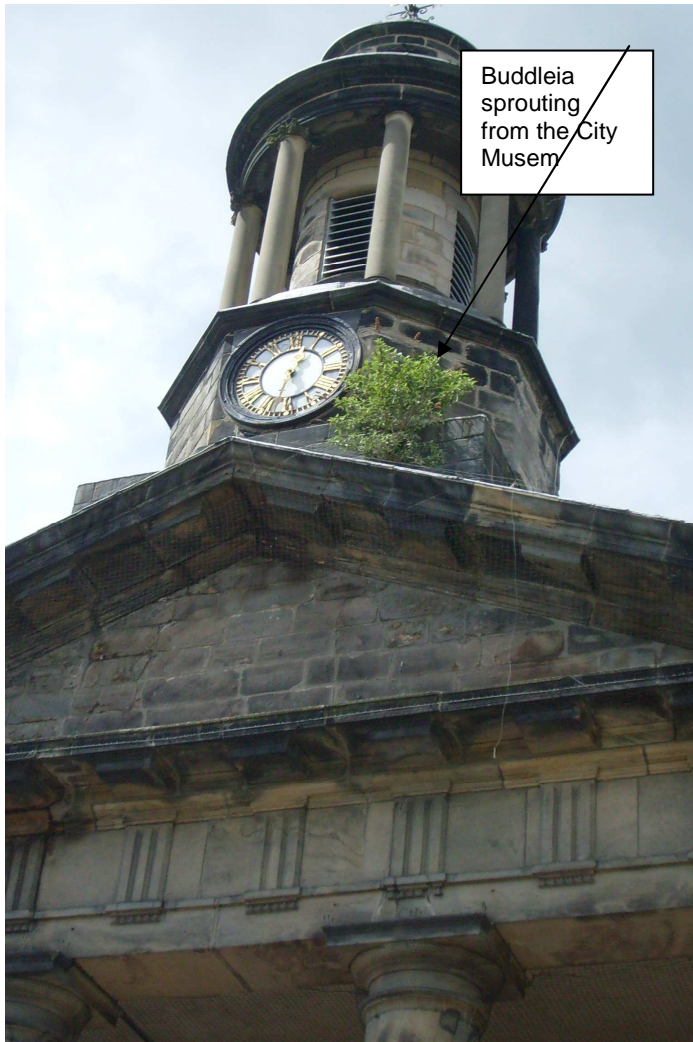
The task group have been advised that maintenance is prioritised; an indication of this is detailed below:

- The worst categories and urgent works within the condition survey.
- Within those categories, further prioritisation based on the effect that a failure of a building component would have – e.g. Likelihood to do harm to people and how many people would be affected (e.g. falling ceilings at Morecambe Town Hall).
- Compliance with legislation, e.g. electrical safety checks.
- Effect on the Council's core activity e.g. ceiling failure of roof at IT annexe allowing rainwater ingress to shut down computer systems.
- The need to prevent serious deterioration to the building, e.g. the backlog of repairs in the past has been significant and resulted in the cost of individual items rising significantly – the delays in undertaking works to the Lancaster Town Hall clock Tower is a significant example of this.



The Grade II listed **Clock Tower in Morecambe** was built in 1905. The appearance of this local landmark was described as 'disgraceful and shabby' in an article published in the Morecambe Visitor in August 2007. Despite repairs to the seating, the canopies were not repaired at this time leaving one resident to comment, *'the tower has been like this for years. I think Morecambe people care about this piece of their heritage. But does the council care?'* This is illustrative of current maintenance policy - repairs to the seating was regarded as a priority for safety reasons but the canopies did not come into this category and were not perceived as a priority.

However as this recent photograph shows, the canopies have now been repainted.



During the tour of the Council's fixed assets within Lancaster it was apparent that several of the listed buildings hosted self-seeding vegetation most notably the shrub, Buddleia as illustrated in this recent photograph of the **City Museum** in Market Square.

The task group are of the opinion that this does not provide a good impression to visitors, particularly as this is situated in a prominent part of the building. However, such vegetation causes dampness and movement in the stone masonry.

Moreover, the tour enabled the task group to observe the condition of the paintwork of doors and windows and it was apparent that this had received little attention in recent years.

The task group have been advised that for a number of years there has been a policy not to undertake any external

painting of woodwork to most of the City Council's historic building stock. This is due to a lack of funds for maintenance and the need to prioritise those funds into areas of greater structural need. The windows in some of the Grade II* listed buildings are in poor condition and if left much longer will need very extensive repair work and even replacement. Repairs prior to painting may be extensive for some of the public buildings.

The main risk is the loss of historic windows due to wet rot. Some of the windows in the Council's buildings date from the eighteenth century and in terms of listed buildings this could be classified as neglect of historic windows and could justify the serving of an urgent works notice. Not maintaining the windows by regular painting increases the risk of damage due to rot and increases the risk of failure of the traditional putty fronted detail used for most historic windows. Paint provides weather protection to the wood. There are several paint products available that will allow painting intervals of 5/6 years and whilst the paint is more expensive it lasts longer.

The task group expressed concern that if the putty in these older windows fails and the glass becomes dislodged there is the possibility that this could cause serious injury to passers by and could lead to compensation claims against the Council. However, the task group have been assured that any potentially dangerous deterioration would be highlighted through regular condition surveys and addressed immediately.

The Conservation Officer has advised the task group that the following fixed Council assets are in the most urgent need of painting:

- ❑ Palatine Hall (Future ownership under consideration)
- ❑ City Museum
- ❑ Maritime Museum
- ❑ Assembly Rooms
- ❑ 4 Queen Street
- ❑ Railings and gates – Remembrance Garden Lancaster Town Hall
- ❑ Cottage Museum

The following also require painting:

Lancaster Town Hall

Fire Station annexe

Morecambe Town Hall

Ryelands House (Future ownership under consideration)

St Leonards House (Future ownership under consideration)

1 Dalton Square (Future ownership under consideration)

The task group are aware that the future ownership of a number of these buildings will be considered as part of the Access to Services review and in view of this minimal maintenance has been proposed for these buildings as indicated in the table on pages 23.

However, the condition of a number of the prominent buildings which are not subject to the Access to Services Review does little to encourage civic pride among residents or impress tourists and visitors. The task group recognise that the condition of many of these historic buildings is the result of many years of neglect and inadequate maintenance and this is endorsed in the letter to the Lancaster Guardian quoted earlier in the report which culminates in the following lament, 'the large and important civic buildings remain as black as they were the day I left home, nearly 50 years ago.' Unfortunately, visitors only see the external appearance of buildings and do not appreciate the serious problems that exist within the structure and behind the facades. Complete refurbishment is the key to restoring the aspects of civic pride in the municipal buildings

For the historic buildings which the Council intends to maintain within its property portfolio, the task group agree that maintenance and repair projects need to be regarded as a priority. Whilst consideration must be given to painting the woodwork not only to increase the attractiveness of the buildings but to avoid further deterioration and colossal repair costs, it is essential that the basic fabric of the buildings must be given priority as failure to do so could result in serious failure of the building structures and services.

With regard to the policy of minimum maintenance for the properties which are likely to be disposed off, the task group are concerned that the lack of maintenance will have an adverse affect on the potential capital which the sales will indeed generate particularly with the downturn in the value of commercial properties at this present time. Moreover the task group are concerned that in neglecting the appearance of these buildings the Council subjects itself to further criticism. Palatine Hall has only been painted externally on one occasion in the last 26 years and the Council has been criticised by other property owners in Dalton Square for 'lowering the tone of the neighbourhood.' However, with the limited funds that are available the Council has a choice of spending its limited resources on the buildings that it wishes to retain or those that it wishes to sell. In this context, the safety of the occupiers and the

ability to continue delivering services becomes a priority above the aesthetics of the buildings.

RECOMMENDATION 3

- (a) That the programme of works from the Condition Surveys be given priority in the Capital Programme and that funding be made immediately available to start this important work.
- (b) That upon completion of this programme of works a rolling programme of maintenance for the historic buildings within the City Council's property portfolio be devised and that this programme should include painting.
- (c) That buddleia and other vegetation be removed from the buildings to reduce the possibility of further damage to the fabric of the buildings and this be managed within existing resources.

It will become apparent in this report that there appear to be far fewer recommendations relating to the Council's historic Fixed Assets than the historic Non-Fixed Assets and that some clarification may be required with regard to this.

With regard to the Non-Fixed Assets it is evident that a number of the recommendations will have limited financial implications, could be implemented in the near future or could assist and indeed add value to current proposals, notably Access to Services.

With regard to the Fixed Assets the task group appreciate that the application of a layer of paint and removal of vegetation alone will have little impact apart from improving the appearance of the Council's historic building portfolio if essential maintenance is neglected. Moreover improvements to the non-fixed assets would appear futile if much needed maintenance to the fabric of these historic buildings including leaking roofs is not addressed. As has been detailed in this report, funds have been allocated for essential repairs but this is dependent on capital receipts. Therefore the task group would urge Cabinet to make the maintenance and backlog of repairs a priority.

NON-FIXED HISTORIC ASSETS

7.4 The Historic Charters of Lancaster

The historic charters of Lancaster are unique and of fundamental significance to the City's heritage. The borough of Lancaster was founded by a charter granted in 1193 and Lancaster received its first royal charter in 1199 by King John; and both these charters, along with the most recent charter are currently on display at the City Museum. The majority of the remaining earlier charters are housed in a cabinet designed by Waring and Gillow for this purpose in 1949 with several later charters stored in cases located in the strong room in the basement of Lancaster town hall.

The City Charters were examined by the Conservation Manager from Lancashire Record Office in October 2003 to establish their overall condition and record environmental and storage conditions in the strong room and make recommendations for their preservation. The Conservation Manager's findings referred to the 'neglect' and 'inappropriate measures' used for storage and display'. Moreover 'conservation treatment would enhance their condition, improved storage and environmental conditions would ensure their long term survival.' A number of recommendations were included in the findings as outlined below:

- Location of documents in more suitable environmental conditions
- Removal from present confined storage
- Provision of singular storage
- Remedial conservation performed by a qualified professional
- Minimum intervention to prevent any further deterioration
- Cleaning and flattening of the manuscripts
- Refurbishment and repair to the seals where necessary
- Archival made-to-measure enclosures for charters to provide protection from handling
- Archival made-to-measure enclosures for seals providing protection from further breakage
- Boxing/packaging made to archival specification, suitable for display purposes if necessary
- Surrogate copies made available for use

Unfortunately these findings were never formally presented to the City Council and it is regretful that it was not possible for either Members or Officers to be made aware of the concern expressed at this time with regard to the long-term future of these unique documents. It would appear that the production of the report detailing the Conservation Manager's findings coincided with the reorganisation of the Museums Service and transfer of staff from the City Council to the County Council.

The task group were grateful to receive a copy of this report and eager to ascertain whether the Charters may have deteriorated further in the interim. Following on from the visit to the Record Office, the County Archivist Bruce Jackson agreed to attend a future meeting to discuss options for future storage and this was preceded by a further look at the charters.

The County Archivist informed the task group that the Charters housed in the cabinet appeared drier and brittle and were likely to deteriorate further unless they were re-housed in more suitable accommodation. The task group were advised that a

number of the charters had been subject to partial repairs over the years but unfortunately these earlier attempts at conservation had caused further damage. Several of the charters are not stored in the cabinet but in cases and these charters showed evidence of damp and mould.



Remnant of one of two Charters of **King Henry IV' 1410**: directive to Irish officials for toll-free passage of Lancaster burgesses.

The County Archivist also suggested that the charters needed to be more accessible to the public and this could be achieved

through producing good quality copies which could be displayed whilst the originals could be transferred to the Record Office where they would receive the necessary conservation and appropriate storage whilst remaining the property of Lancaster City.

It has been suggested that through making the charters more accessible to the community it would be possible to apply for heritage lottery funding to assist with the costs of producing copies of the charters if the City Council decides that it would like to copy a number of the charters. The Heritage Lottery Strategy 2008-2013 maintains that its focus is on 'conserving, sustaining and sharing heritage' so such a project would hopefully tick all the boxes. The task group have been advised that the Records Office would be prepared to provide copies of several of the charters at no expense to the City Council.

The task group are of the opinion that conservation of these unique and historically important charters is essential to avoid further deterioration. The task group recognise that storage of these documents could be either in the Town Hall or in the County Records Office but if the charters were to be retained at Lancaster a new facility to house them in the correct conditions would need to be provided and this would have notable cost implications. The task group were advised that the cost of only a basic museum display case would be at least £5K, although this would not be adequate for storing the charters. The task group agree that the most appropriate location for the charters would be the County Records Office where they would remain the property of the City Council.

The task group also discussed the **Williamson Family Tree** document which is currently located in the strong room and agreed that enquiries should be made to see whether this unique parchment could also be transferred to the Records Office for preservation purposes with a copy produced which could be on public display at Williamson Park. Williamson Park is also celebrating its centenary in 2009 and the task group agreed that it would be a fitting addition to any exhibits to commemorate the Park as would the charters be a valuable addition to any exhibition to celebrate the centenary of the town hall.

Morecambe's Charter is currently located in a safe in the ante-room leading to the Mayor's Office at Morecambe Town Hall. It is displayed on heritage days.

The task group agree that the district's charters should be more accessible to the public and would support opportunities for displaying any copies which are produced – including during Local Democracy Week.



7.4.1. Paintings

The rationale for establishing the Council Assets Task Group included concern at the condition of the various paintings of local dignitaries and politicians displayed in Lancaster Town Hall. A condition survey of 29 of the oil paintings was undertaken by Phillip Bourne, Conservation Officer (Pictorial Art) in 2004 following on from a previous survey by the North West Museum Service in 1998.

Heather Davis, Conservation Manager together with Phillip Bourne discussed the findings of this report with the task group and accompanied the task group on a tour of the Banqueting Suite explaining the level of priority allocated to the various paintings within that room.

The task group were not aware of this condition report and subsequent enquiries with the Head of Property Services confirm that the report does not appear to have been submitted to any Committee despite the suggestion that it would be.

The task group were advised that 7 of the 29 oil paintings surveyed were classified as high priority and were actively deteriorating and in urgent need of treatment. The following information has been extracted from the report.

Portrait	Location	Priority 1-4 (1 = urgent)	Estimate cost to repair in 2004
William Storey JP	Reception Room	3	£ 775.00
Thomas Swainson	Reception Room	1	£2225.00
Thomas Preston JP	Reception Room	1	£2365.00
Charles Blades JP	Reception Room	2	£1425.00
Thomas Greene MP	Reception Room	2	£2345.00
Samuel Gregson	Banqueting Suite	3	£1690.00
Alderman William Bell JP	Banqueting Suite	3	£1558.00
Alderman William Smith	Banqueting Suite	3	£1690.00 - £1950.00

Alderman Thomas Giles	Banqueting Suite	1	£2740.00 - £3265.00
James Giles	Banqueting Suite	2	£1955.00 - £2215.00
Mrs Elizabeth Giles	Banqueting Suite	1	£2740.00 - £3000.00
Alderman Williamson JP	Banqueting Suite	1	£2740.00 - £3265.00
Alderman Greg	Banqueting Suite	1	£3265.00
Mrs Briggs	Mayor's Parlour	3	£ 902.00
William Briggs	Mayor's Parlour	1	£ 771.00 - £902.00
Lady Ashton	Mayor's Parlour	3	£ 902.00
Sir Noval Watson Helme	Mayor's Parlour	3	£ 640.00 - £771.00
James Mansergh	Mayor's Parlour	3	£ 242.00
Alderman George Jackson	Mayor's Parlour	3	£ 337.00
Sir Thomas Storey	Mayor's Parlour	3	£ 771.00
William Pitt	Ashton Hall	2	£3265.00 - £4045.00
Richard Owen	Ashton Hall	3	£2440.00
Leonard Redmayne	Ashton Hall	3	£1033.00
Samuel Gregson	Ashton Hall	4	Not necessary
George III	Ashton Hall	2	£5415.00- £5915.00
Duke of York	Ashton Hall	2	£5415.00 - £5915.00
Admiral Lord Nelson	Ashton Hall	3	£3315.00 - £4095.00
Lord Ashton	Main Stairs	4	Not necessary
Queen Elizabeth II	Banqueting Suite	4	Not necessary
Estimated Total for repairs based on 2004 prices (not including VAT)			£58,515.00

Key

- 1 Fragile condition, actively deteriorating, in urgent need of treatment
- 2 Requires structural work, will deteriorate further
- 3 Requires mainly cosmetic treatment such as cleaning, re-varnishing
- 4 No treatment necessary

The report confirms that some of the paintings within the Ashton Hall have received conservation treatment in previous years including surface cleaning and re-varnishing although they had deteriorated once again as a result of environmental effects on the layers of varnish. Indeed the report suggests that the nature of some of the public events which have taken place in the past have had a 'detrimental affect on the portraits.' The report refers to the Ashton Hall being used for 'raves' but this practice was stopped following concern that the vibration from the music and dancing would damage the structure of the Hall. The report suggests that if 'if the Hall was at risk then so was its contents.'



Among the portraits regarded as a high priority is that depicting Alderman Williamson, JP. The condition survey suggested this was in an 'extremely fragile' state with large areas of loose and flaking paint.

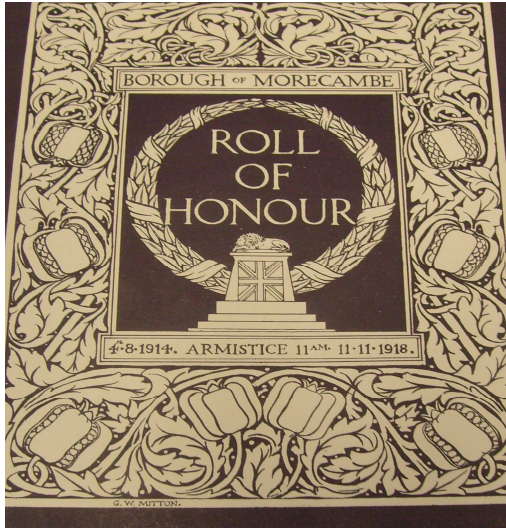
The task group regard the paintings as integral to the town hall. The following quotation is taken from the project summary in which the author of the condition survey, Phillip Bourne reflected in 2004: "The paintings of local people, politicians and those who have contributed so much to the history of Lancaster deserve to be saved. As I walked through the rooms in the town hall I could not help thinking that there was a link here to "what have the Victorians/Edwardians done for us?" In the city of Lancaster the answer is a great deal.'

In view of the likely possibility that many of the paintings may have deteriorated further since the report was produced and the original figure was provided as a guide for broad planning figures, the task group recognise that there is likely to have been an increase in the estimated repair costs of £58,515.00. The task group would like to see an imaginative funding programme devised in order to address the issue of restoring the paintings which are such a fundamental part of Lancaster Town Hall. One suggestion to help fund a rolling repair programme which the task group would endorse is that a percentage of the hiring costs of the Banqueting Suite, Ashton Hall and Town Hall tours should be channelled into a 'Restoration Fund'. In addition, in light of next year's centenary the task group would recommend that the Mayor for 2009/2010 consider including the 'Restoration Fund' as one of their chosen 'charities'. Not only would this provide vital funds to help with restoration costs but it would potentially generate public interest and awareness in the City's distinctive heritage.

7.4.2 Other Non-Fixed Assets

Whilst the charters and paintings have received particular attention in this report, the City Council are responsible for a great many non-fixed assets of historical importance. In recent years a fairly comprehensive catalogue of civic assets has been undertaken, however there does not appear to be a record of the various assets which are either on display or stored in the Council-owned buildings.

During the tour of the strong room at Lancaster the task group commented on the silverware relating to the Morecambe Music Festival and how it would be more appropriate for this to be located and displayed at Morecambe Town Hall.



The Roll of Honour commemorating servicemen from Morecambe who lost their lives in the Great War 1914-1918 is located in a safe in the ante-room leading to the Mayor's office in Morecambe Town Hall. The task group believe that it would be a fitting tribute for this to be displayed occasionally; possibly as part of the Remembrance Sunday.

The Roll of Honour listing Honorary Freemen from the district (including the signature of Prince Charles) is currently situated in a display cabinet in the Mayor's Parlour at Lancaster Town Hall.

A great deal of Waring and Gillow furniture is housed in both town halls, much of which appears to have been especially commissioned for Lancaster Town Hall and the task group sought reassurance with regard to cleaning regimes. It was noted that a specialist was last contracted to repair damaged chairs over 10 years ago and that a number of chairs are now in need of repair. The task group have also been advised that the centrifugal Waring and Gillow table in the Mayor's Parlour which was the focus of particular attention when Lancaster Town Hall was featured on 'Antiques Roadshow' in 2005, would benefit from the attention of a French polisher as there was some concern over advisability of continuing to demonstrate the workings of the table to visitors in its current state of repair.

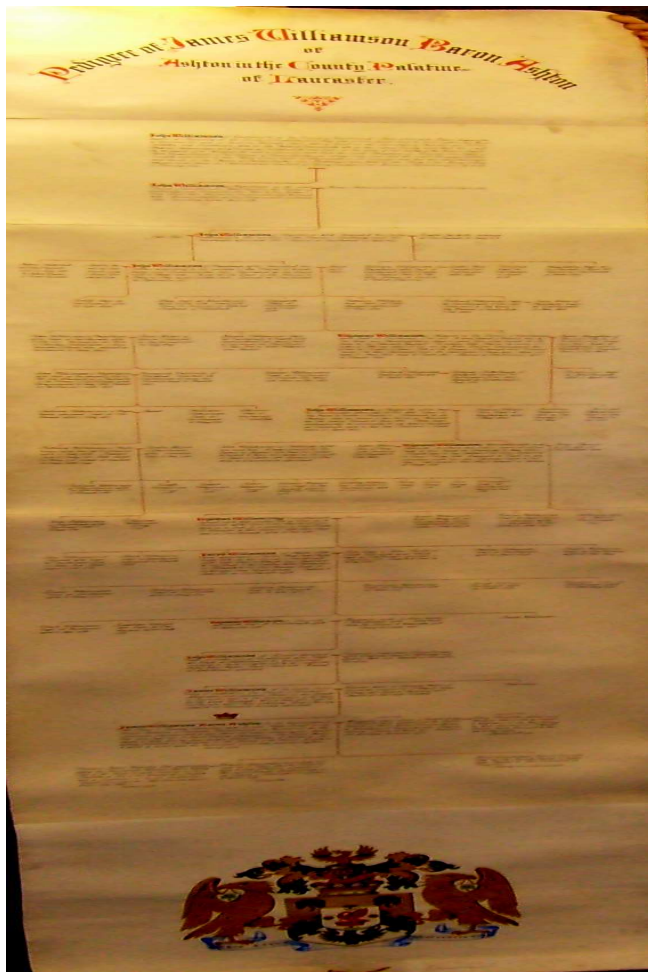
The task group were concerned at storage arrangements for some of the larger pieces of furniture and agree that consideration needs to be given to future use/storage and even the possibility of disposal of some items as a result of the Access to Services Review which is likely to reduce the ability to suitably house all of the City Council's historic/valued fixtures.

The task group note the restorative work which is now being undertaken on the Norman and Beard organ in Ashton Hall and the success of the Organ Restoration Project in raising the profile of this unique instrument and securing vital funding to support this. The task group are hopeful that similar interest might be generated in restoring, maintaining and making available for display other assets of historical interest which form an essential component of the district's heritage.

RECOMMENDATION 4

- (a) That the Charters of Lancaster be relocated to the Records Office in Preston for conservation, storage and safekeeping whilst ownership remains with the City Council, and enquiries be made with the Records Office as to the complimentary copies they would be prepared to produce.
- (b) That an application be made for heritage funding to produce copies of all of the City's historic charters for public display.
- (c) That the original 'Williamson Family Tree' currently stored in the Legal Services strong room be transferred to the Records Office for conservation, storage and safekeeping and enquiries be made with regard to commissioning a copy for future display in Williamson Park, subject to the agreement of the Williamson Park Board.

- (d) That consideration be given to finding innovative means of funding a rolling repair programme for the oil paintings and other restorative works to non-fixed assets in Lancaster Town Hall and that any additional cost implications are considered as part of the annual budget process. Funding options could include: that a percentage of the hiring fees for the Banqueting Suite, Ashton Hall and tours of Lancaster Town Hall be channelled into a 'Restoration Fund.'
- (e) That an updated inventory of non-fixed assets and where appropriate and within existing budgets, an updated condition survey of the City Council's fixed assets be undertaken.
- (f) That attempts are made to exhibit more of the Council's assets including the relocation to, and display of, the Morecambe Music Festival silverware in Morecambe Town Hall.
- (g) That consideration be given to the future use/storage including the possibility of disposal of some items of furniture in view of the limitations on space within the town halls as a consequence of the Access to Services Review. and that Department for Culture, Media and sport (DCMS) guidance be followed in the event of any disposal.



The **Williamson Family Tree** or Pedigree of James Williamson Baron Ashton is rolled up and housed in a case in Legal Services strong room. The tree traces the Williamson family from the birth of John Williamson of Grosthwaite in 1470 to 1900; including the two daughters, Eleanor and Maud of Lord Ashton. Measuring over six feet in length the parchment contains hand-painted inscriptions. The task group would like to see a copy of this document on public display so it can be viewed and enjoyed by interested visitors and residents with the original transferred to the Records Office to ensure its preservation. Initial enquiries have been made with Cultural Services to ascertain whether it would be possible to include provision within the lottery bid to produce a copy for display at Williamson's Park. Even if this is not possible enquiries indicate that there would be support for a copy to be

produced and displayed at the Park.

7.5 Records Retention

Within the task group's remit was the need to ensure that there is clear guidance regarding the keeping of records of historical value. To assist in developing an understanding of policies in relation to the retention of records the advice of the County Archivist was sought. The task group, fearful of the potential destruction of documents which might be of future historical significance sought the advice of the County Archivist with regard to what documents should be maintained, what documents could be transferred to the Records Office and what should be destroyed.

From an archivist point of view the task group have been advised that documents only need to be retained permanently for legal reasons or if they contain unique information of historical value. With the colossal increase in the volume of documents now produced there is no longer a requirement to preserve the vast majority of documentation. It would appear that rather than being guilty of wantonly destroying documents, the Council is guilty of needlessly hoarding documents.

The County Archivist has confirmed that the County Records Office will only accept records which they determine as being of permanent historical value and would assess any records which services might identify as falling into this category. However as a caveat to ensure that services do not overlook records which might indeed be of permanent value, it is essential that guidelines are in place to identify what type of material is likely to be of long term value.

The County Archivist has also confirmed that there may be capacity issues regarding the transfer of records to the Records Office; particularly as their expansion plans have been hindered by failure to secure HLF funding and therefore it was important for the Information Management Officer to liaise with the Records Office on this matter.

The Records Management Policy (2006) 'sets out a corporate approach to ensuring arrangements are in place for the care and administration of all records, regardless of medium, from creation until selection for destruction or permanent preservation.' Responsibility for records retention rests with each service and is dictated by legal requirements and differs from service to service.

During discussions with the Information Management Officer it was agreed that it was not practical in an authority of this size to employ a dedicated records manager however it was necessary to ensure that all services were aware of their responsibilities and it was noted that the retention and disposal schedule was not as complete as it should be. It was agreed that the Information Management Group should be requested to ensure that all services revisit this schedule.

During discussions with the County Archivist it became apparent that the City Council needs to be consistent in its approach to records management. A centralised records management approach with a central inventory to ensure consistency and reduce duplication was vital. The role of IT in records management was also raised. The task group agreed that it would be useful for the Information Management Officer to meet with the County Archivist.

With the Access to Services Review programme likely to result in the need to accommodate many more staff at both of the town halls space will be of a premium. The task group suggest that it would make good sense for the Council to take this opportunity to reflect on its document retention policies and ensure consistency. Disposing of documents for which there is no further use or legal or viable reason to

retain is likely to free up much-needed space which might prove useful to assist with accommodating relocated staff.

Moreover, the task group note that there will be substantial cultural change connected with the Access to Services Review resulting in a need for electronic document management and this will need to be addressed by services in the near future.

RECOMMENDATION 5

- (a) That consideration is given to developing a regularly updated centralised records management system with a central inventory to ensure consistency and reduce duplication.
- (b) That services identify which, if any records they consider need to be transferred to the Records Office and advise the Information Management Officer.
- (c) That the Information Management Officer engage with the County Archivist regarding records retention and arrangements for the transfer of agreed material to the Records Office.
- (d) That the Information Management Group be requested to ensure that each service revisits the current retention and disposal schedule to ensure records they hold are covered by it.
- (e) That all services are encouraged to dispose of documentation/records for which there is no longer a legal or viable need in conjunction with Corporate policy and, if need be seek clarification from the Information Management Officer.
- (f) That any important documentary records remaining in the town halls be relocated from the strongroom to a more suitable location.

7.6 'If you've got it flaunt it' – Providing Value to the Community

The Head of Cultural Services advised the task group that the £500,000 budget for the Museums Partnership now resided with Cultural Services and one of the consequences of this was the Service Head's attendance at the Museums Advisory Group. The Partnership was now into year six of a ten year agreement with the City Council owning and maintaining responsibility for the maintenance of buildings and the County Council employed as a contractor, providing the Museums Service. The task group were advised that an objective within Cultural Services Business Plan was to review the Museums Partnership but it was commented on that despite the City Council's commitment, it was not uncommon to overlook the fact that the Museums Service remained a City Council Service and was part of a partnership agreement with the County Council.

This was illustrated further during discussions with the Museums Manager North who has attended a number of the task group meetings and provided valuable contributions to these meetings. The task group are optimistic that the transfer of responsibility of the Museums Service to Cultural Services will provide opportunities for effective engagement between all parties connected with the district's museums and help residents, visitors and all interested parties to recognise the Museums as a valuable asset to this district.

The task group were advised that a 'Heritage Group' had been brought together to develop a strategic approach in view of the recognition of the potential value that a district's heritage could add to opportunities for economic development and regeneration. This 'Heritage Group' were concerned that the district was not making the most of its heritage and had already visited the Roman Bath House remains at Vicarage Fields.

The task group concur that the 'heritage' networks that Cultural Services have established could be utilised to help promote the district's heritage further, particularly with regard to the forthcoming centenary.

The task group have also been advised that the Head of Cultural Services presented a report on the funding of the Museums Service to the Budget and Performance Panel in accordance with their monitoring of partnerships role.

RECOMMENDATION 6

- (a) That Cultural Services continue to raise awareness of the Museums Partnership and takes an active role in promoting the heritage of the district further.

9 April, 2008

Mr Stephen Gardner,
Senior Conservation Officer,
Planning Services,
Palatine Hall,
Dalton Square,
Lancaster LA1 1PW.

Dear Stephen,

Lancaster: Roman Bath-House

The Committee of the Lancaster Archaeological and Historical Society has asked me to contact you again regarding the future of the Roman Bath-House on Castle Hill. As I'm sure you can imagine, we remain extremely concerned about the structural and general state of the site, particularly since we have heard 'on the grapevine' that some Council money that had been used for basic minimal care of the site has now been transferred to other projects. The question that comes to the fore now is 'how long can this state of affairs be allowed to continue before radical measures will have to be considered?' By this we mean the possibility that, if anything of the Bath-House is to be retained for future generations, the site may have to be back-filled and returned to grass. This would be a great pity, especially since the recent discovery of the Roman Cavalry Tombstone at Penny Street Bridge serves to emphasise the importance of Lancaster in the Roman scheme of things in the north west. It is also important to keep in mind that the Bath-House is part of an archaeological site about which our knowledge is as yet far from complete.

It is to be greatly regretted that the Society failed in its attempt last year to secure lottery funding to undertake a complete non-invasive survey of Castle Hill, as this would undoubtedly have enhanced our appreciation of the importance of the Bath-House. We shall re-submit our application this year, though with the level of lottery money that is currently being absorbed by the 2012 Olympics, I have doubts about the likelihood of success.

We would greatly appreciate any thoughts that you may have on all this, and would be grateful if you could pass on our misgivings to any colleagues whom you would regard as relevant to the matter. On our side, we shall keep you informed about our progress in re-submitting our lottery application, and any further thoughts that may arise in the course of local discussions on the future of the Bath-House site.

With best wishes,
Yours sincerely,

(Chair: Lancaster Archaeological and Historical Society)

2

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.

The importance of heritage assets

'Heritage' is about the values that people attach to places. Our rich inheritance of local authority-owned historic buildings and other heritage assets reflects the history of communities and public services. 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, often over several centuries, they matter to people – who must be consulted about their future.

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.

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

CABINET RESPONSE TO COUNCIL ASSETS TASK GROUP REPORT – 7TH OCTOBER 2008

Cabinet Member with Special Responsibility Councillor Evelyn Archer)

(Councillor Gerrard, in her capacity as Chairman of the Council Assets Task Group, was allowed to speak on the item in accordance with Cabinet Procedure Rule 2.6).

Councillor Gerrard presented the findings of the Council Assets Task Group to Cabinet and asked that members consider adopting the recommendations set out in the Task Group's report.

It was moved by Councillor Mace and seconded by Councillor Burns:-

- “(1) That Cabinet notes recommendations 1, 2, 3(b), 3(c), 5 and 6 of the Assets Task Group
- (2) That Cabinet prioritises the works identified in the conditions survey within the Capital Programme (item 12 on the Agenda) in accordance with recommendation 3a
- (3) That a report be produced setting out the resource implications of taking forward recommendations 4(a)-(g).”

Members then voted as follows:-

Resolved unanimously:

- (1) That Cabinet notes recommendations 1, 2, 3(b), 3(c), 5 and 6 of the Assets Task Group
- (2) That Cabinet prioritises the works identified in the conditions survey within the Capital Programme (item 12 on the Agenda) in accordance with recommendation 3a
- (3) That a report be produced setting out the resource implications of taking forward recommendations 4(a)-(g).

Officers responsible for effecting the decision:

Corporate Director (Regeneration)
Head of Property

Reason for making the decision:

The decision recognises the importance of taking forward the programme of works from the Condition Surveys as a priority and of looking into the resource implications involved in improving the storage, preservation and exhibition of key documents and assets as outlined in the Task Group report.