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CURRENT LAW, POLICY & GUIDANCE

This chapter reviews the current legislation, policies and guidance that apply to heritage assets in England.

Works to protected buildings and sites are subject to two main areas of legal control, each with their associated policies and regulations. The first concerns heritage conservation, which is largely, but not wholly, embedded in the planning system, although all is now subject to the *National Planning Policy Framework*. The second concerns fitness for purpose and safety, which is largely set out in *Building Regulations*, but supplemented by other measures relating to health and safety in construction and the protection of other public interests, including natural heritage (see *Ecological Considerations*). Practice in both areas is underpinned by standards and professional guidance.

This section provides an overview at the time of writing (2012), but policy and regulation, particularly, are subject to frequent revision.

HERITAGE CONSERVATION

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LEGISLATIVE & POLICY FRAMEWORK

The preceding chapter explained how primary legislation intended to protect specific historic buildings and structures developed incrementally in the UK. It is mostly applied in the context of a comprehensive town and country planning system, with the objective of regulating the use of land in the public interest (the right to develop land was, in effect, nationalised under the Town and Country Planning Act, 1947). It is the principal means by which cultural and natural heritage values as a public interest in land are protected and enhanced, and it is a specific objective of the current overriding *National Planning Policy Framework* (DCLG March 2012) which replaces all previous *Planning Policy Statements* and related guidance.

Over the last half a century the interpretation and implementation of legislation has inevitably grown in complexity and extent to the point where the standard textbook on the law relating to the historic environment in the UK, Charles Mynors' *Listed Buildings, Conservation Areas and Monuments*, 2006 (now in its fourth edition) runs to some 950 pages. The current framework of controls for different types of heritage assets is set out below, insofar as it relates to the repair of historic buildings and structures. It should be noted that statute and policy do not define precisely how these regimes for managing change within the historic environment should be applied to individual cases, which is, therefore, ultimately a matter for the courts.



For example, what constitutes 'demolition' as opposed to 'alteration' has been determined by the *Shimizu (UK) vs. Westminster City Council* case. The extent of 'curtilage' and 'setting' in individual cases, and the determination of works that do not require Listed Building Consent, rely on case-law and precedent (*Mynors 2006*). What constitutes 'substantial harm' as opposed to 'less than substantial harm' in terms of the *National Planning Policy Framework* has yet to be tested.

Managing change in the historic environment

St Pancras Station, London (1864–68), designed by William H. Barlow (1812–1902), has been successfully adapted to meet the requirements of the 21st century in a redevelopment that includes the Eurostar rail terminal, retail premises, and leisure facilities.

PLANNING POLICY FOR THE HISTORIC ENVIRONMENT

The *National Planning Policy Framework (NPPF)* sets out the Government's planning policies for England, including the conservation of all aspects of the historic environment, although the underlying (historically separate) legislative frameworks remain. The *NPPF* requires a proportionate approach based on understanding the significance of the heritage asset or assets concerned, in line with the general principles of conservation planning. This approach should underpin all interventions in heritage assets, even if they are not the subject of statutory control.

Section 12 of the *NPPF*, 'Conserving and enhancing the historic environment', is used as the policy basis when the relevant authorities are making plans or taking decisions. It is intended to allow a unified, strategic approach to managing change in the historic environment, regardless of the type of heritage asset under consideration or permission needed. At its heart is a presumption in favour of sustainable development, with a particular emphasis on the need for economic development. It recognises that the historic environment is an irreplaceable resource that brings social, cultural, economic and environmental benefits, and that heritage assets should be conserved in a manner appropriate to their significance, so they can be enjoyed for their contribution to the quality of life of present and future generations.

The *NPPF* applies to all elements of the historic environment, using the single term 'heritage asset' defined (in Annex 2) as "*a building, monument, site, place, area or landscape identified as having a degree of significance meriting consideration in planning decisions...*". 'Significance' is defined as the "*...value of a heritage asset to this and future generations because of its heritage interest. That interest may be archaeological, architectural, artistic or historic. Significance derives not only from a heritage asset's physical presence, but also from its setting.*" The *NPPF* defines 'designated heritage assets' as world heritage sites, scheduled monuments, listed buildings, protected wreck sites, registered parks and gardens, registered battlefields and conservation areas, but also recognises the significance and potential of undesignated heritage assets.

The *NPPF* does not contain an express presumption in favour of conserving designated heritage assets. It recognises there will be situations where substantial public benefits might outweigh the harm to and loss of significance caused by a proposed development. However, it states that 'great weight' should be given to the conservation of designated heritage assets, and that harm or loss should not be permitted without 'clear and convincing justification'. The importance of understanding significance sufficiently when assessing the potential impact of proposals is recognised, as is the value of gathering information to contribute to the knowledge and understanding of heritage assets, and making this publicly accessible.

WORKS TO LISTED BUILDINGS

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Legislation governing listed buildings and conservation areas is largely consolidated in the *Planning (Listed Buildings and Conservation Areas) Act 1990* (the *1990 Act*). The Secretary of State has a duty to compile a statutory list of buildings of 'special architectural or historic interest' and, in doing so, is informed by the expert advice of English Heritage. Detailed selection criteria have been developed around the concept of 'national importance' and are set out in *Principles for Selection of Listed Buildings* (DCMS, March 2010), supported by English Heritage's *Selection Guidelines* (March 2007) for listed buildings set out by building type. Virtually all buildings predating 1840 are listed, with increasing selectivity thereafter. Local authorities hold copies of the lists for their areas, and there is a national online database.

Listed buildings are designated in three (non-statutory) grades: Grade I, covering the most significant 2.5 % of buildings; Grade II* ('two star'), covering the next 5.5 %; and Grade II, covering the remaining 92 % of listed buildings. Listed Building Consent is required from the local planning authority for works "*for the demolition of a listed building, or for its alteration or extension in any manner which would affect its character as a building of special architectural or historic interest*" (1990 Act, s7). Regardless of the grade, when a building is listed, the entire building, both inside and out, is protected, as is "*any object or structure fixed to the building*" and "*any object or structure within the curtilage of the building which, although not fixed to the building, forms part of the land and has done so since before 1st July 1948*" (1990 Act, s5 (a), (b)). Exceptionally, a list entry may specifically exclude a part of a building (for example, a very large recent extension) as being "*not of special interest*".

Curtilage structures are normally buildings or other structures, such as boundary walls or gates, historically associated with the principal listed building, but generally ancillary to it. If such a structure was in separate ownership when the principal building was listed, it will not usually be regarded as a curtilage structure. It is, however, always advisable to seek advice from the local planning authority in writing about whether works to a particular curtilage structure require Listed Building Consent.

Listed building control does not prohibit change to listed buildings, but is intended to ensure that, so far as possible, changes do not harm their significance. The *NPPF* sets out the basis on which applications for Listed Building Consent should be determined. It relies on two key principles: that the significance of a heritage asset must be adequately understood before a decision about proposals affecting it can be made (policy 128); and that when "*... considering the impact of a proposed development on the significance of a designated heritage asset, great weight should be given to the asset's conservation. The more important the asset the greater the weight should be.*" (policy 132). Applications for Listed Building Consent must therefore clearly identify the significance of the listed building, both as a whole and particularly in relation to the elements affected (which will not normally be clear from the list description); and justify the proposed works against an objective of eliminating or minimising any harm to that significance. *NPPF* (policy 132) goes on to state that "*Substantial harm to or loss of a grade II listed building... should be exceptional*" and for Grade I and II* listed buildings "*...wholly exceptional*".

The wide range of listed buildings

The term 'building' is defined broadly in the legislation and may include such things as lamp posts, telephone kiosks, lime kilns, bridges, cranes, railings, garden walls, statues, milestones, and man-made landscape features such as ha-has and grottos. Listing formalises a structure's special architectural and historic interest, and brings decisions about its future under the consideration of the planning system. All buildings built before 1700 that survive in anything like their original condition are listed, as are most of those built between 1700 and 1840. The criteria become tighter with time, so that post-1945 buildings have to be exceptionally important to be eligible for listing; normally, a building must be over 30 years old.

Since the 1990s, English Heritage has undertaken thematic assessments for listing that are focused on particular types and locations of 'heritage assets' (for example, railway buildings, military structures, post-Second World War buildings, cinemas, schools, agricultural buildings, letter boxes and many others). It has also published a series of selection guides setting out the assessment criteria for a wide range of buildings and structures (see Current Law, Policy & Guidance: Further Reading).

Clockwise from top left: Trellick Tower, Royal Borough of Kensington and Chelsea, London (Grade II*); Second World War tank obstacles, Isle of Grain, Kent (Grade II); hand-operated dockside crane, Bristol (Grade II); E. Pellicci café, East London (Grade II); K2 telephone kiosk (Grade II).



Listing for group value

New Bolsover Model Village (Grade II). Buildings may be listed for 'group value' where they are part of an important architectural or historic group, or are fine examples of planning, such as terraces, squares or model villages. Bolsover Castle, visible in the background, is a listed building (Grade I), a Scheduled Ancient Monument, and a Registered Park and Garden (Grade I).

Many local authorities produce guidance tailored to local building types and traditions. Interpretation can vary between authorities, especially concerning the need for consent for repair which follows such good practice. Routine maintenance and minor repairs are unlikely to require Listed Building Consent if they do not affect the significance of the heritage asset. Proposals for substantial intervention and the introduction of new materials are much more likely to require consent than those which minimise replacement of historic fabric, and use materials and techniques which match the originals (*Mynors 2006*).

The advice of the local authority conservation officer should therefore always be sought before embarking on any significant repair or periodic renewal of the fabric of a listed building, since undertaking works requiring, but not having, consent is a criminal offence. If work is undertaken without consent, the local planning authority can issue a listed building enforcement notice, as well as prosecuting those responsible. Where a Listed Building Consent application is necessary, every effort should be made to respond to the local planning authority's pre-application advice and to provide the information required to support the application.



The granting of Listed Building Consent does not obviate the need for planning permission if the proposals involve a material change to the external appearance of a listed building. Few conservation repair projects that follow the good practice necessary to achieve consent (or agreement that consent is not required) are likely to do so. Where it is required, however, Listed Building Consent and planning permission should normally be sought at the same time. Whilst applications for Listed Building Consent should be determined against national policy and guidance, applications for planning permission for the same works must also comply with local planning policies. Obtaining Listed Building Consent does not imply that planning permission will be granted for the same works, or vice versa.

While local planning authorities process and determine Listed Building Consent applications, those involving work to Grade I or Grade II* listed buildings, or the total or substantial demolition of any listed building, must be referred to English Heritage. In London, English Heritage has the power to direct the local authority to refuse Listed Building Consent in such cases; elsewhere, if English Heritage or a National Amenity Society has unresolved objections to particular types of application, the local planning authority, if minded to grant consent, must first refer the application to the Secretary of State for Communities and Local Government to give him the opportunity, advised by English Heritage, to call it in for his own determination. English Heritage officers may therefore need to inspect the building for which consent is sought. Local authorities cannot grant themselves Listed Building Consent for their own buildings and must seek consent directly from the Secretary of State (who will take advice from English Heritage).

There is currently no fee payable for a Listed Building Consent application. The target period for determination is eight weeks, but it can take much longer, particularly for work to Grade I and II* listed buildings, for the reasons explained above. Refusal of consent by local authorities is subject to a right of appeal to the Secretary of State for Communities and Local Government; most decisions are delegated to Planning Inspectors.

Listed Building Management Agreements can provide clarification as to what types of change to a listed building may or may not require Listed Building Consent. Such agreements do not have statutory weight, but are based on an informal consensus between all stakeholders, including the local planning authority, on the acceptability of (usually minor, repetitive) change within a listed building that does not affect its special character. Management agreements are particularly relevant to large, post-war listed buildings, where there is ongoing pressure for change. The first agreement was produced for the then Willis Faber Building in Ipswich. English Heritage has published a study report, *Streamlining Listed Building Consent: Lessons from the Use of Management Agreements* (see Further Reading).



Curtilage structures

The Coach House, Audley End, Essex, is not listed in its own right, but since it is ancillary to Audley End House – a listed building – it is subject to listed building control.

WORKS TO LISTED BUILDINGS IN ECCLESIASTICAL USE

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Under section 60 of the 1990 Act, some places of worship can be exempted from listed building control. *The Ecclesiastical Exemption (Listed Buildings and Conservation Areas) (England) Order* (2010) limits this to places of worship actively in use by the Church of England, the Church in Wales, the Methodist Church, the Roman Catholic Church, the United Reformed Church and the Baptist Union. These bodies operate their own systems of control for work to their places of worship, and in return have ‘ecclesiastical exemption’ from the need to obtain Listed Building Consent (but not planning permission, nor approval under the *Building Regulations*). Where works are proposed to such a place of worship, an application must be made to the relevant denominational body. Applications will be referred to English Heritage according to the same criteria as apply to other listed buildings. Ecclesiastical exemption generally applies only to buildings in active use for worship, not to associated, but separately listed, structures, such as churchyard monuments or walls.

For all but minor routine maintenance work to Church of England churches, a ‘faculty’ is required: this applies to all church buildings in active use for worship, not just listed buildings. After informal consultation, the parish must apply formally to the relevant Diocesan Advisory Committee [DAC], which then makes a recommendation (by way of a certificate) to the Diocesan Chancellor, to whom formal application (a ‘petition’) is then made for a faculty, on which English Heritage and other interested parties may be consulted. DACs normally expect a high standard of conservation repair to historic churches. Anglican cathedrals have separate arrangements under the *Care of Cathedrals (Amendment) Measure* (2005).

The other exempted denominations operate similar systems of control; all other places of worship are subject to the need to obtain Listed Building Consent in the usual way. *The Operation of the Ecclesiastical Exemption: Guidance* (DCMS 2010) provides details about whom and what is exempt, and the relevant procedures.

WORKS TO SCHEDULED MONUMENTS

Legislation governing scheduled monuments was consolidated and updated in the *Ancient Monuments and Archaeological Areas Act 1979* (the 1979 Act), which gives the Secretary of State for Culture, Media and Sport a power (rather than, as with listed buildings, a duty) to maintain a schedule of monuments of national interest: in doing so, the Secretary of State is informed by the expert advice of English Heritage. Works to scheduled monuments are controlled by the Scheduled Monument Consent [SMC] regime, which is wholly separate from the planning process. *The Scheduled Monuments Policy Statement* (DCMS, March 2010) sets out the Government’s policies in relation to the identification, protection, conservation and investigation of archaeological sites under the 1979 Act, and explains the basis on which monuments are designated and the requirements for SMC.

Scheduled monuments are not categorised by grade: they are all considered to be of national importance. However, not all nationally important archaeological remains are scheduled, because scheduling is primarily a management regime. Most scheduled monuments are archaeological sites, some of which include upstanding structural remains, but the schedule particularly includes defensive works of all periods, and medieval buildings and structures which are largely unused. Dwellings (except for caretakers' accommodation) and buildings in ecclesiastical use cannot be scheduled.

The most important practical difference between scheduling and listing in relation to repair is that virtually all works (including maintenance) require Scheduled Monument Consent. There are some minor exceptions for which consent is granted by the *Ancient Monuments (Class Consents Order)* (1994). For structures, these relate primarily to works by British Waterways essential for the functioning of a canal. However, recurring maintenance works (which of course are essential to sustaining historic structures) can be permitted under a management agreement between the occupier and the Secretary of State or English Heritage, which may provide financial assistance.

The schedule of ancient monuments is held by English Heritage and in the regional *Historic Environment Records* [HERs], and will be online in the near future. HERs also hold archaeological data about scheduled monuments, and applicants for SMC should refer to the relevant HER. Applications for SMC must be made to the relevant regional office of English Heritage, from which forms and guidance may be obtained. All applications for SMC are determined by the Secretary of State for Culture, Media and Sport, advised by English Heritage. Consent will usually be conditional on appropriate impact assessment and recording by professional archaeologists. Irreversible changes should be avoided and intervention should generally be the minimum necessary to conserve the monument.

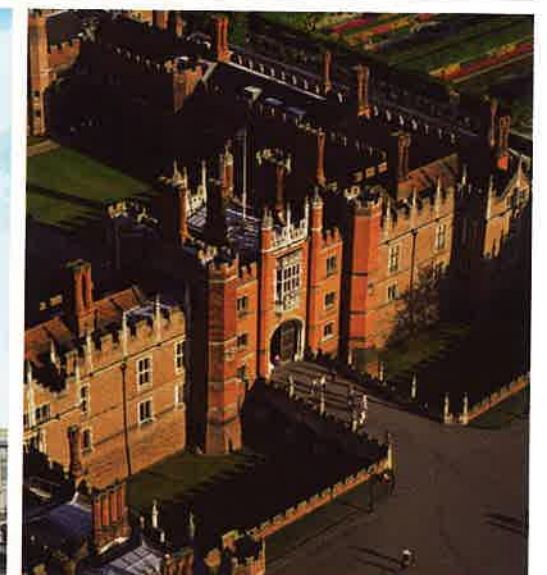
Any proposed repairs to a scheduled monument should be discussed with the regional office of English Heritage at an early stage. As with listed buildings, undertaking unauthorised works to a monument is a criminal offence, but at least there is clarity as to the need for consent. Unless repairs to a scheduled monument constitute development, planning permission will not be required and the local planning authority will not be formally involved. Until the 2006 revisions, scheduled monuments were completely exempt from the *Building Regulations*. The revised *Building Regulation 21(3)* now states that they are exempt from the energy efficiency requirements of the *Building Regulations* where compliance would unacceptably alter their character or appearance (*Building Regulations, 2010*).

A small number of scheduled monuments are also listed: in such cases, scheduling takes precedence and only SMC is required. The anomaly of dual designation is gradually being removed in favour of the listing of buildings in use and the management of change through Listed Building Consent.

Dual designation

Some scheduled monuments are also listed buildings. In such cases, scheduling takes precedence and change is managed through Scheduled Monument Consent [SMC].

Clockwise from top: The Iron Bridge, Ironbridge in Shropshire; Hampton Court Palace, Surrey; Fairbairn Steam Crane, Bristol.



WORKS TO BUILDINGS IN CONSERVATION AREAS

Apart from specific controls over demolition, the management of the 'special architectural or historic interest' of conservation areas (which are designated under section 69 of the 1990 Act) is achievable principally through planning control of material alterations to the external appearance of buildings. Certain works that are normally exempt require planning permission. These include the demolition, in whole or part, of most buildings and structures, including: walls and outhouses; additions or alterations to the roof of a dwelling house (including dormers); cladding of external walls of a dwelling house; installation of satellite dishes; and the lopping or felling of trees.

Since, however, dwelling houses in single occupation have extensive 'permitted development rights' even in conservation areas, normal planning control is only effective in residential areas if those rights are curtailed by a direction made by the local authority under Article 4 of the *Town and Country Planning (General Permitted Development) Order* (1995) [GPDO] and subsequently enforced (see *Understanding Place: Conservation Area Designation, Appraisal and Management*; English Heritage, March 2011).

Conservation areas are 'designated heritage assets' under the terms of the *NPPF*, so any development or alterations to buildings within them needing planning permission should avoid or minimise harm to those aspects of the character or appearance of the area that warranted its designation. Applications are determined by local planning authorities (with the advice of English Heritage, in cases of demolition and major development), and must have regard to the *NPPF* and adopted local policy. Planning applications are made to the local authority in the usual way, but if the work involves demolition of a building, conservation area consent is also required. Applications will normally need to include additional information proportionate to the impact of the works on the significance of the building or place and their setting.



Permitted development rights
Unsympathetic replacement window installed in an unlisted dwelling in a conservation area under 'permitted development rights'. This is an all-too-common sight in conservation areas where permitted development rights have not been curtailed by 'Article 4 direction'.

Unlisted buildings which are considered by the local planning authority to make a positive contribution to the character or appearance of a conservation area are 'non-designated heritage assets' for purposes of the *NPPF*. Such buildings can be identified, for example, in a published character appraisal of the conservation area, or by being 'locally listed' by the local authority. The relevant policies need to be applied to development proposals affecting them, or their setting (policy 135).

In most cases, however, conservation repair alone (like-for-like repair in original or matching materials), rather than any associated alteration or reinstatement, will not normally require planning permission, even in a conservation area. Statutorily listed buildings, of course, remain protected by the separate Listed Building Consent regime (see *Works to Listed Buildings*) whether or not they are in a conservation area.

GUIDANCE

BS 7913:1998 GUIDE TO THE PRINCIPLES OF THE CONSERVATION OF HISTORIC BUILDINGS

"This British Standard provides information, advice and guidance on the principles of the conservation of historic buildings." It is intended "to provide building owners, managers, archaeologists, architects, engineers, surveyors, contractors, conservators and local authority building control officers with general background information on the principles of the conservation of historic buildings, when considering conservation policy, strategy and procedures".

The British Standard Guide represented an important step forward in formulating general principles and expounding good professional practice that were separate from, and more comprehensive than, national planning policy, but compatible with it. The Guide recognises the importance of the aesthetic values of historic buildings, whether designed or fortuitous, as well as the historical and archaeological values of their fabric, and emphasises the importance of understanding the building prior to works and recording further information discovered during them. Criteria are set out for judging the acceptability of proposals for repair, restoration, alteration, addition and new work in historic settings and areas. While seeking to minimise intervention in historic fabric, the Guide urges quality in new work.

One aim of the Guide was to prompt statutory authorities to adopt consistent approaches to the conservation of historic buildings. In the event, its influence was and is limited, primarily because the British Standards Institution [BSI] needs to cover its costs through a restrictive approach to copying and a high purchase price (in January 2011, £130 for 28 pages, half of which are substantially outdated annexes). Following consultation on the business case for revising and updating the Guide, the BSI has, at the time of writing, agreed that the revision should proceed. English Heritage will chair the task group appointed to take the work forward under the auspices of the responsible BSI committee.

Working with British & European Standards

A standard is a published document containing precise criteria, designed to be used as a rule, a guideline or a definition, which presents an agreed and repeatable way of doing something. They are 'achievable' rather than 'best' practice; in many cases, best practice is significantly more rigorous.

In Britain, standards are produced by the British Standards Institution [BSI], and nearly all carry the prefix 'BS'. British Standards are drafted by committees comprising manufacturers, consumers, government departments and research organisations. All European Standards must be adopted by the BSI, and these are prefixed by *BS EN*. Adoption of other international standards is optional, but in practice most are incorporated into the BSI, and are published with the prefixes *BS ISO* [International Organisation for Standardisation] or *BS IEC* [International Electrotechnical Commission].

It is not obligatory to follow British Standards, but laws, regulations and contracts may refer to certain standards, and these may include clauses that make compliance compulsory.

There are six types of British Standard:

- Specifications list the detailed requirements that products, services or processes must satisfy.
- Methods give a complete account of the way in which something should be done, and a list of the necessary tools or equipment.
- Guides give background and general information about a subject (an example is *BS 7913:1998 Guide to the principles of the conservation of historic buildings*).
- Vocabularies give definitions of the terms used in a particular field.
- Codes of Practice give recommendations for acceptably good practice (for example, *11/30241242 DC BS 8221-1. Code of practice for cleaning and surface repair of buildings. Part 1. Cleaning of natural stones, brick, terracotta and concrete*).
- Classifications give descriptions of and designations for different grades of product or material.

Very few standards relate specifically to conservation, and many standards can prove inappropriate or impossible when applied to historic building materials or systems. In this case historical evidence of durability and performance usually provide a more convincing argument for choosing particular methods or materials, but British Standards may still be useful as a reference point for developing a suitable specification for particular projects.

ENGLISH HERITAGE (2008): CONSERVATION PRINCIPLES, POLICIES & GUIDANCE FOR THE SUSTAINABLE MANAGEMENT OF THE HISTORIC ENVIRONMENT

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The background to this document (*Conservation Principles*) is explained in the preceding chapter. Its stated aim is to “*set out a logical approach to making decisions and offering guidance about all aspects of the historic environment*”, and it was intended to help English Heritage “*ensure consistency of approach in carrying out [its] role as the Government’s statutory advisor on the historic environment in England*”.

Conservation Principles sets out an intellectual framework for making decisions about change to significant places, which applies as much to decisions about the repair and maintenance of historic buildings as it does to those concerning major change affecting the wider historic environment. The process involves a step-by-step approach, enabling users to arrive at logical, defensible responses to complex issues. It combines the definition of six core principles with more detailed policies and guidance on their application when making decisions about changes to the historic environment. Under Principle 4, conservation is defined as “*the process of managing change to a significant place in its setting in ways that will best sustain its heritage values, while recognising opportunities to reveal or reinforce those values for present and future generations*”. It is explained that, as used in *Conservation Principles*, the term ‘place’ means “*Any part of the historic environment, of any scale, that has a distinctive identity perceived by people*”.

English Heritage Conservation Principles

1. The historic environment is a shared resource
2. Everyone should be able to participate in sustaining the historic environment
3. Understanding the significance of places is vital
4. Significant places should be managed to sustain their values
5. Decisions about change must be reasonable, transparent and consistent
6. Documenting and learning from decisions is essential

Conservation Principles identifies and elaborates on a range of heritage values, grouped under the headings of evidential, historical, aesthetic and communal. These are considered in more detail in the following chapter. Under Principle 3, the 'significance' of a place is defined as embracing "*all the diverse cultural and natural heritage values that people associate with it, or which prompt them to respond to it. These values tend to grow in strength and complexity over time, as understanding deepens and people's perceptions of a place evolve.*" The idea of significance and how it is evaluated is discussed in the following chapter.

The final section of the document sets out practical policies and guidance for evaluating and advising on proposals involving heritage places, ranging from routine management, maintenance, renewal and repair, to changes intended to increase knowledge, restorations, new works, and enabling development. While produced primarily to guide English Heritage staff, *Conservation Principles* was subject to wide public consultation, and its adoption and application by the sector has been encouraged (not least by the document being freely available).

Although its language may still be unfamiliar, *Conservation Principles* nevertheless builds on earlier statements and experience in formalising an approach to assessing the impact of change that takes account of a wide range of heritage values. The overarching message of *Conservation Principles* is that "*balanced and justifiable decisions about change in the historic environment depend upon understanding who values a place and why they do so, leading to a clear statement of its significance and, with it, the ability to understand the impact of the proposed change on that significance*" (Conclusion, para.161). As previously noted, national policy on deciding planning permissions, listed building and conservation area consents is set out in the *National Planning Policy Framework* [NPPF] (March 2012). It defines 'sustainable development' as development that adheres to the principles and policies within the document, which as far as the heritage assets are concerned are materially the same as those set out in PPS5, its predecessor.

The NPPF defines 'heritage assets' as buildings, sites and areas that have heritage 'significance'. This is defined as: "*The value of a heritage asset to this and future generations because of its heritage interest. That interest may be archaeological, architectural, artistic or historic. Significance derives not only from a heritage asset's physical presence, but also from its setting.*" This broad definition covers all the cultural significance of a place and is coextensive with the definition of 'significance' within *Conservation Principles*, which is the sum of the 'heritage values' of a place.

WHERE NEXT FOR HERITAGE POLICY?

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During the 1980s, historic environment policy began to be seen as a linked but distinctly separate strand from land-use planning policy. In the first decade of the 21st century, this gap started to close. This is likely to be an ongoing trend, at least for the next few years. Currently, the national planning policy framework clearly places the historic environment as just one of the many elements that need to be factored into planning decisions. Economic, social and environmental considerations are now all taken into account when forming planning policy for sustainable development. At present, economic considerations are being given greater emphasis, as the reality of the global financial crisis still continues to be felt. Too much emphasis on any of the three elements at the expense of the others will not result in long-term, successful and appropriate solutions, and heritage 'outrages' are likely to occur.

With a likely continued squeeze on funding for the public sector, the decline in the number of specialist historic staff in local authorities and heritage agencies seems set to continue. While this might limit the influence of the historic environment sector in the wider planning world, not-for-profit and voluntary groups are growing in size and influence, and they are likely to fill a part of the void, if not all of it. The so-called 'Third Sector' (the voluntary and not-for-profit sector) is already a powerful lobbying force that demonstrably influences elements of policy, helping to set and refine parameters for historic environment policy in England. This is likely to continue in the coming years. In fact, the first few years of the 21st century may well be seen with the benefit of hindsight to be the 'golden age' of public sector historic environment intervention. The private sector has always had by far the largest stake in the historic environment for a simple reason: it owns the vast majority of it. The Third Sector has become increasingly willing to work directly with the private sector without the intervention of the public sector. This may well permanently change the dynamic of the relationships between the key players in the historic environment.

Whether the current Government's 'Localism' drive for community-level planning becomes the default level for planning remains to be seen. Community-level planning might become an important, but limited issue, concerning mainly areas undergoing major change, or ones with residents with the time, resources and willingness to become fully engaged in planning their neighbourhood. The debate around who makes decisions about the future of heritage assets that are of more-than-local importance will never be wholly resolved. Owners, local communities, local, regional and national special interest groups, national politicians and technocrats and, on occasion, international interests all have a stake. It will be the mark of a highly robust policy if it manages to balance all these interests, while continuing to conserve and enhance our historic environment.

FITNESS FOR PURPOSE & SAFETY

In addition to legal requirements for heritage conservation, historic buildings are also subject to a range of building and other legislation that is concerned, mainly, with fitness for purpose and safety.

RECONCILING LEGISLATION WITH SIGNIFICANCE

Meeting the requirements of legislation concerned with functional performance and safety in historic buildings, in a way that avoids diminishing their significance, often involves ingenious and bespoke solutions developed in close consultation with controlling authorities. In some cases, it may be desirable to appoint a specialist consultant to assist in this process; for example, a fire engineer who will develop an alternative fire safety strategy for a building. In general terms, the aim should be to achieve an appropriate balance between meeting the functional requirements of the legislation to a reasonable level while sustaining heritage values. This process requires not only a thorough understanding of the purpose of legislation and the heritage values and significance of the building, but also knowledge of the building as a physical entity (structure and fabric) and how it behaves as an environmental system. In practical terms, deciding what is appropriate or reasonable involves considering a range of factors, including the likely effectiveness of measures, their impact on heritage values, the associated technical risks (for example, their adverse effects on the durability of the building fabric), whether the measures are reversible, and whether there are overriding environmental or community benefits to the proposals.

THE BUILDING REGULATIONS & RELATED PROVISIONS

The *Building Regulations* set standards for the construction of buildings to achieve a minimum level of acceptable performance. The regulations apply mainly to new buildings and there is no general requirement for existing buildings to be upgraded to meet these standards. However, certain changes, such as alteration, extension or changes of use, can trigger the need for existing buildings to be upgraded to comply, and related legislative requirements concerned with the use of buildings (also considered here) can prompt the need for physical change. Advice should always be sought from the building control provider about whether or not proposed works are subject to control. The regulations themselves are a statement of performance requirements and are not prescriptive. *Approved Documents* give practical guidance on how compliance with the functional requirements of the *Building Regulations* can be demonstrated. That historic buildings may require alternative approaches to meeting requirements is recognised in the *Approved Documents* for some parts of the building regulations.

FIRE SAFETY

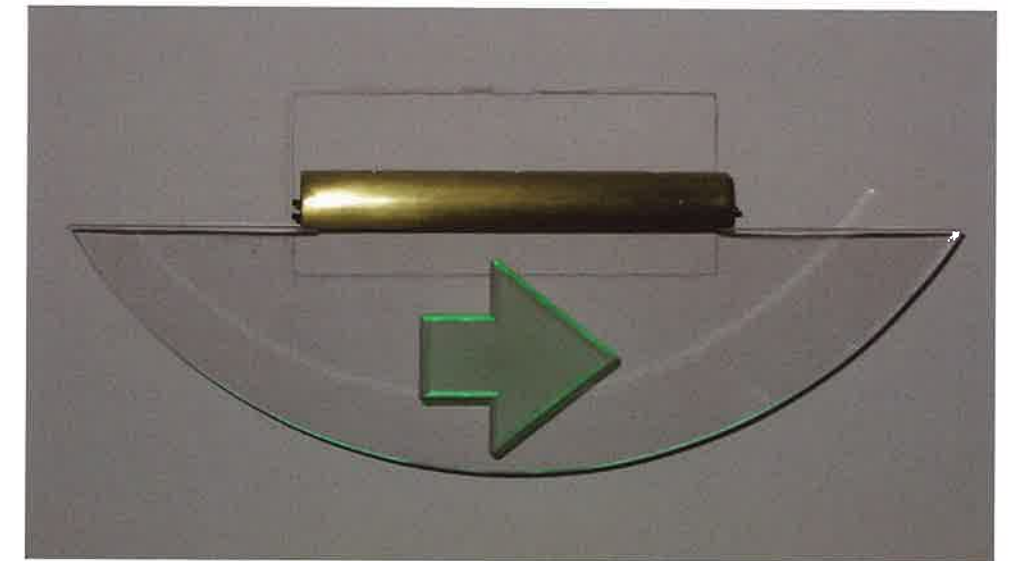
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Approved Document B (Fire Safety) allows for variation of the provisions in historic buildings where adherence to the guidance might be unduly restrictive. In such cases, it advises that it would be appropriate to take into account a range of fire safety features, and to set these against an assessment of the hazard and risk peculiar to the particular case.

Approved Document B also acknowledges that fire safety engineering can provide an alternative approach to providing reasonable levels of fire safety. This approach, based on site-specific risk assessment, can be beneficial in historic buildings (see the box on **Fire Safety in Historic Buildings**). It often allows greater emphasis to be placed on active fire protection measures, such as automatic fire detection, and suppression systems and fire safety management, to avoid, or at least minimise, disruptive upgrading of building fabric.

The *Regulatory Reform (Fire Safety) Order 2005* applies to the use of all premises except single private dwellings (previous legislation applied to designated uses of premises such as hotel, office, shop, factory and railway premises). Fire risk assessments, carried out by the 'Responsible Person', are required for all premises falling within the scope of the Order. These are used to highlight any steps that are necessary to ensure the safety of relevant persons (employees, contractors, visitors and other occupants). A series of 12 guides has been produced to help the 'responsible person' undertake their fire risk assessments in various uses of premises, such as offices and shops, places of assembly, factories and warehouses, and educational establishments. The guidance shows ways of complying with the legislation and is not intended to be prescriptive. All of the guides contain an appendix referring to the special needs of historic buildings.

A site-specific, fire engineering approach can be helpful in devising strategies which meet fire safety requirements with minimal impact on heritage values. Here, directional signage and emergency lighting – to illuminate a means of escape in the event of power failure – have been designed to be as unobtrusive as possible. Although a non-standard exit sign, it nevertheless clearly indicates the way out.



Fire Safety in Historic Buildings

USE OF THE 'BUILDING FIRE PERFORMANCE METHOD'

Where adherence to guidance would adversely affect the significance of a historic building, a fire safety engineering approach can be helpful in identifying alternative, less disruptive, strategies for meeting requirements to provide reasonable levels of fire safety. The 'Building Fire Performance Method' is a way of organising the complex and interactive network of fire dynamics, potential active and passive fire safety systems, manual intervention and timescales into a logical framework. It enables the effect of fire in a specific building to be visualised, taking into account all the relevant factors involved in fire spread. There are five distinct components to the building fire performance evaluation:

- *'Prevent established burning' analysis*
This is concerned with basic fire prevention: eliminating ignition sources, keeping combustibles to a minimum, and having fire and fire safety management procedures in place. An understanding of the way fire spreads is necessary to allow this analysis to be reasonably accurate.
- *'Flame and heat movement' analysis*
This assumes that a fire has reached the stage of established burning and evaluates the building's existing fire safety potential to prevent further spread beyond the room of origin. Established burning is the point at which the fire prevention activities have failed and the building's fire safety design becomes critical.
- *'Smoke and toxic gas' analysis*
The smoke and toxic gas analysis also assumes that the fire has reached the established burning stage. It assesses the ability of the building to keep escape routes available and safe during the evacuation period and beyond.
- *'People movement' analysis*
This balances the time required for occupants to escape against the time taken for the escape routes to become hazardous.
- *'Structural frame' analysis*
This analysis looks at the ability of the building structure to remain stable during a fire and to resist deformation or collapse.

The 'Building Fire Performance Method' is ideal for historic buildings because it enables site-specific solutions to be identified, based on the assessment of risks, and provides the basis for informed discussions about alternative solutions. Solutions can be compared for their effect on the fire performance of the building, and their impact on its heritage values and significance. A qualified fire safety engineer, experienced in working with historic buildings, should be engaged to carry out the evaluation and to make recommendations on possible solutions.

STRUCTURAL SAFETY

Proposed building works to a historic building will be subject to control under *Part A (Approved Document A – Structure)* of schedule 1 of the *Building Regulations* if they involve 'building work' as defined in Regulation 3. This includes underpinning, new work and 'material alteration'. Compliance is also required where certain classes of change of use of a building are proposed. The point at which repair becomes new work or a material alteration is a matter of degree and is to some extent open to interpretation. For example, the renewal of a pair of damaged or defective rafters in a roof could reasonably be regarded as repair. However, if more than half the rafters in the roof require replacement, perhaps involving temporary propping and shoring, this would most likely be considered as 'building work' requiring approval under the *Building Regulations*. Similarly, where replacement roof coverings are proposed which are heavier than the existing, or where additional members are needed to strengthen the roof structure (for example, purlins, beams and struts), this will be deemed a 'material alteration'. Similar principles apply to other building elements.

RESISTANCE TO THE PASSAGE OF SOUND

Certain material changes of use of a building (which are defined in Regulation 5 of the *Building Regulations 2010*) are subject to new regulatory requirements (set out in Regulation 6) which include, among other things, control under *Part E: Resistance to the passage of sound*. However, the current *Approved Document* acknowledges that in historic buildings it may not be practical to improve sound insulation to the standards set out. In such cases, an approach is allowed in which the sound insulation is improved to the extent that is practically possible without harming the significance of the building, or increasing the risk of long-term deterioration of building fabric or fittings. Section 4 of *Approved Document E* gives guidance and details of treatments that give reasonable levels of sound insulation in dwelling houses and flats formed by material change of use.

Radon

Radon is a clear, odourless radioactive gas produced by the decay of uranium, which is found in low concentrations in most soils, particularly over granite and limestone bedrock. It produces radioactive dust in the air and increases the risk of lung cancer.

If levels of radon exceed the 'action level' in radon-affected areas, remedial measures (either basic or full) will be a requirement under the *Building Regulations Part C*, where existing buildings are subject to alteration, extension or change of use. **ENVIRONMENT MORTARS**

Further information can be obtained from the Health Protection Agency: [www://ukradon.org/](http://www.ukradon.org/) and the BRE: www.bre.co.uk/radon/

VENTILATION

Approved Document F (Ventilation) requires that people in a building are provided with adequate means of ventilation. In historic buildings it will most often be the replacement of windows that triggers the need for compliance with Part F (along with Part L, and in some cases Part N). *Approved Document F (Ventilation)* gives guidance on the provision of background (trickle) vents in windows. However, if the window being replaced does not contain background (trickle) ventilation, there is no requirement for the new one to include such provision.

The approved document also gives guidance on the extent of purge (formerly rapid) ventilation in replacement windows. In meeting requirements, consideration should be given to the 'whole house' ventilation concept. For example, if a room has opening windows on two opposing walls, these will be more effective than a single window of greater proportions in one wall only. Also, a room with a working flue is likely to have more than adequate ventilation, even if the area of the opening lights in the windows is less than the norm. However, if the window being replaced is one that is required as a fire-escape window under Part B (Fire Safety), then very careful consideration must be given to the openable area, especially if there is no alternative escape provision in the dwelling.

CONSERVATION OF FUEL & POWER

Approved Document L (Conservation of Fuel and Power) applies to existing buildings where substantial alterations to thermal elements or controlled fittings or services are to be carried out, or where extensions or changes of use are proposed. However, listed buildings, buildings in conservation areas and scheduled monuments are exempted from the need to comply with the energy efficiency requirements of the *Regulations* where, and to the extent that, compliance would unacceptably alter their character or appearance. Special considerations apply to buildings that are locally listed, or in national parks or other designated historic areas, and buildings that are of traditional construction. Special considerations also apply to buildings used primarily or solely as places of worship. In these classes of buildings, the requirement is to improve energy efficiency up to, but not beyond, the point that the character and appearance of the building is unacceptably altered, or the long-term durability of the building fabric or fittings is reduced. English Heritage has published detailed 'second tier' guidance on the *Building Regulations Part L*, which the *Approved Document* states should be taken into account in determining appropriate energy performance standards for building work in historic buildings (see Further Reading).

GLAZING

Approved Document N: Glazing – Safety in relation to impact, opening and cleaning outlines safety requirements concerning glazing, and the operation and cleaning of windows. It notes that the "installation of replacement windows or glazing (e.g. by way of repair) is not building work..." and therefore not subject to Part N requirements. However, the need to meet the requirements of Part N may be brought about by a change of use of the building.

ACCESS

Approved Document M (Access to and Use of Buildings) applies to existing buildings when they are materially altered or extended. It also recognises the need to conserve the special characteristics (that is, significance) of historic buildings. It advises that, in such cases, the aim should be to improve accessibility to the extent that measures do not prejudice significance or increase the risk of long-term deterioration.

The *Approved Document* recommends striking a balance between conservation and accessibility, and promulgates an approach which takes into account the views of local access groups and heritage authorities.

The *Equality Act 2010* replaces major parts of the *Disability Discrimination Act*, which was intended, among other things, to facilitate dignified access for disabled people to services. To meet requirements, the service provider has to take reasonable steps to remove physical features that impede access, or, where this would involve unacceptable alterations to a historic building, to provide reasonable alternative methods of making the services accessible to disabled people.



English Heritage has produced guidance on approaches to meeting these requirements (see Further Reading).

A lift provided for wheelchair users at St Alban's Cathedral.

Thermal Performance of Traditional Buildings

The basic purpose of a building is to moderate the extremes of climate to create comfortable spaces in which to live, work and play. Its external envelope provides shelter from rain, wind and snow, and shade from the sun. It also keeps in warmth, and regulates the entry of light and air. There is a continual and complex interaction between the building envelope, heat and moisture that affects both the internal environment and the behaviour of the building fabric. Traditional buildings incorporate elements and materials that influence this interaction in particular ways. For example, the high thermal mass of solid masonry walls and chimney breasts act as a heat store, moderating fluctuations in temperature, and helping buildings feel warmer in winter and cooler in summer. Also, most traditional buildings incorporate permeable materials that are able to absorb and release moisture freely, thereby buffering short-term fluctuations in humidity and reducing the risk of condensation. In addition, cellular room plans regulate the movement of air and heat within the building.

Maintaining the permeability of the fabric is fundamental to the thermal performance of a traditional building, its continuing well-being and the health of its occupants. Unfortunately, in a large number of traditional buildings, this ability to absorb and release moisture freely will have been compromised by adaptations and repairs carried out with the best of intentions, but using inappropriate materials such as cement-based mortars and renders, plastic paints and impermeable waterproofing treatments. Moisture trapped by ill-advised repairs increases the rate at which building fabric deteriorates, and adversely affects thermal performance. This gives a poor impression of the durability of traditional buildings and their ability to provide a comfortable internal environment. Energy efficiency is also diminished in buildings that are poorly maintained. For example, gaps around worn windows and doors, open joints in masonry or between infill panels and timber framing allow uncontrolled air infiltration that significantly increases heat loss. A building that is in a good state of repair can perform to its full potential, and recent research has indicated that the level of performance of traditional buildings is usually much better than assumed.

When considering ways of improving energy efficiency in heritage buildings, the aim should be to achieve an optimal balance between energy conservation and building conservation. To this end, a strategic 'whole building' approach, based on conservation planning principles, is recommended. This is a logical process that entails the following steps:

- Understanding the:
 - heritage value and significance of the building
 - condition of the building fabric and building services
 - current energy use related to building occupation and behavioural factors
 - energy performance of the building envelope and building services
 - hygrothermal behaviour of the building fabric (interaction with heat and moisture)
 - user requirements and aspirations
- Identifying opportunities, and devising measures to improve energy conservation and sustainability
- Evaluating the effectiveness and value for money of such measures
- Assessing the impact of measures on heritage values and significance
- Assessing the technical risks (for example, increased risks of condensation)
- Implementing the optimum strategy
- Monitoring the outcome (for example, post-occupancy evaluation).

This approach helps to identify the package of measures best suited to an individual building or household, taking human behaviour into consideration as well as the performance of the building envelope and services. Inexpensive benign improvements should be carried out before more invasive and potentially harmful measures are considered. In practical terms this incremental approach involves:

- ensuring the building fabric and services are in good repair and properly maintained to obtain the optimum performance from them
- introducing energy-efficient housekeeping, such as closing existing window shutters at night, closing doors, turning off lights and electrical equipment when not in use, avoiding overfilling kettles, taking shorter showers, and so on
- making benign enhancements, such as improving the efficiency of lighting and heating systems, using heavy curtains and thermal blinds to reduce heat losses, or providing 'intelligent' controls for building services
- controlling draughts – particularly through flues, doors and windows (unless secondary glazing is proposed) – to reduce excessive air infiltration throughout the building
- considering low-risk insulation opportunities, such as loft (ceiling-level) and floor insulation and secondary glazing
- considering the provision of energy from renewable sources
- once other improvements have been explored or implemented, considering more expensive and higher-risk strategies such as wall insulation.

English Heritage has published detailed information on energy efficiency in historic buildings (see **Further Reading**), and guidance is also available from www.climatechangeandyourhome.org.uk/ and www.helm.org.uk/. The other volumes in this series also address energy issues, particularly the *Building Environment* volume. **ENVIRONMENT** **ROOFING** **GLASS**

TIMBER **MORTARS**

Left: Evacuated-tube solar thermal panels mounted horizontally on the flat roof of a Victorian terraced house. In this configuration their visual impact is minimal but their output is reduced. Careful consideration should be given to the method of fixing the panels, and the condition and maintenance requirements of the roof coverings beneath.

Right: Secondary glazing fitted to a mid-19th century tripartite sash window. Well-designed secondary glazing need not adversely affect the heritage values of a historic building and is reversible.



Ladders may be used for simple tasks of short duration (such as inspections and cleaning debris from gutters). A risk assessment is required to justify the suitability of a ladder as opposed to other access equipment options.



HEALTH & SAFETY AT WORK

A range of health-and-safety legislation exists that may affect the conservation of historic buildings. This includes the *Workplace (Health, Safety and Welfare) Regulations 1992* and amendments, which cover a wide range of basic health, safety and welfare issues, and apply to most workplaces. The regulations include requirements for workplaces to be maintained in efficient working order (for health, safety and welfare), and that safe routes are provided for circulation in and around the building. In practical terms, there are seldom major conflicts between this legislation and building conservation. However, there may be instances where problems arise, for example, when there is the need to eliminate trip hazards on historic floors or paved areas. Other requirements concerning windows (including cleaning), doors and stairways may affect the conservation of these elements, particularly when a building is brought within the scope of this legislation due to a change of use to a workplace.

Other relevant health-and-safety legislation covers contact with hazardous materials, such as asbestos, and working at heights. The *Construction (Design and Management) Regulations 2007 (CDM Regulations)* makes health, safety and welfare requirements in respect of building operations. The implications of this legislation are discussed in the *Survey & Investigation Methods* and *Managing Maintenance & Repair* chapters of this book. The Health and Safety Executive [HSE] publishes a wide range of detailed guidance (see *Further Reading*).

EUROPEAN UNION DIRECTIVES & STANDARDS

As a member state of the European Union [EU], the UK is obliged to abide by its rules, conform to all *European Commission* [EC] *Regulations*, and incorporate the requirements of any EC Directives into its own legislation. Building conservation is affected by EU Directives, mainly in areas such as general building regulations, procurement, materials standards and restrictions on the availability or use of some traditional building materials, like paint containing white lead, and these do not always take account of heritage impacts. In 2003, a Working Group on EU Directives and Cultural Heritage was set up to research, document, monitor and communicate the consequences of Directives for cultural heritage, with the hope that any adverse effects could be mitigated either at the drafting stage, or when implemented in national law.

By 2007, some 25 directives had been identified and reviewed by the Working Group, in subject areas ranging from restrictions on biocidal and hazardous products, fire safety regulations, and energy efficiency and performance in buildings, including work relating to *Directive 99/13* on the limitation of emissions of volatile organic compounds in paints [VOCs], and *Directive 98/8/EC* on biocidal products. Member states, including the UK, have also been able to enact derogations within their own legislation that specifically address cultural heritage assets and permit use of restricted materials. The Working Group has pressed for a standard 'clause of special consideration' for cultural heritage, which would support similar inclusions by member states in developing national laws.

THE EUROPEAN COMMITTEE FOR STANDARDISATION

Acknowledging the lack of broad standards for European practice, in 2004 the European Committee for Standardisation (*Comité Européen de Normalisation*) [CEN] began a project to formulate pan-European standards for the conservation of cultural property (*CEN/TC 346 Conservation of cultural property* (11 parts; standards under development)). The aim is "to acquire a common unified scientific approach to the problems relevant to the preservation/conservation of the Cultural Heritage. Moreover, this common approach and the use of standardised methodologies and procedures would promote the exchange of information, would avoid the risk of duplication and foster synergy between the European experts and specialists involved in the preservation activity."

The CEN project aims to draft standards in eight areas, including terminology, materials characterisation, and the evaluation of conservation product performance and environmental conditions. Within the UK, input is being coordinated through the BSI Technical Committee for Conservation. Unsurprisingly, given the vast array of subject areas, and the need for significant volunteer input from specialists in participating countries, development has been slow and sporadic. Current progress can be tracked at the BSI website.

Keeping Up-to-Date with Changes in Legislation & Regulations

Changes in legislation and regulations are inevitable, and it is important that conservation practitioners keep up-to-date with current statutory requirements. There are several ways of doing this, including subscribing to automatically updated reference publications or to online information-handling services. Information may also be obtained from the websites of the relevant government departments, and agencies such as The Health and Safety Executive. The 'Planning Portal' provides online access to information and guidance about planning legislation and building regulations, including *Building Regulation Approved Documents*. Official guidance publications are generally available as online downloads, free of charge. Other sources of information include professional and trade journals, and professional conferences or courses organised by professional institutions, universities and other training organisations.

A list of useful sources of information about legislation is given in *Further Reading* at the end of this chapter.

Further Reading

Department for Communities and Local Government (2006); *Regulatory Reform (Fire Safety) Order 2005: A Short Guide to Making your Premises Safe from Fire*; Wetherby: DCLG Publications; also available from www.communities.gov.uk/publications/fire/regulatoryreformfire

Department for Communities and Local Government (2012); *National Planning Policy Framework*; available from www.communities.gov.uk/planningandbuilding/planningsystem/planningpolicy/planningpolicyframework

Department for Culture, Media and Sport (2010); *Principles of Selection for Listing Buildings* (web document); available from www.culture.gov.uk/what_we_do/historic_environment/3330.aspx

English Heritage (2004); *Easy Access to Historic Buildings*; London: English Heritage; also available from www.english-heritage.org.uk/publications/

English Heritage (2008); *Conservation Principles, Policies and Guidance for the Sustainable Management of the Historic Environment*; London: English Heritage; also available from www.english-heritage.org.uk/publications/

English Heritage (2011); *Designation Listing Selection Guides* series (web document); available from www.english-heritage.org.uk/caring/listing/criteria-for-protection/selection-guidelines/

English Heritage (2011); *Understanding Place: Conservation Area Designation, Appraisal and Management*; London: English Heritage; also available from www.english-heritage.org.uk/publications/

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Mynors, C. (2006); *Listed Buildings, Conservation Areas and Monuments* (4th edition); London: Sweet & Maxwell

Scheduled Monuments: Identifying, Protecting, Conserving and Investigating Nationally Important Archaeological Sites under the Ancient Monuments and Archaeological Areas Act 1979; London: DCMS; also available from www.culture.gov.uk/what_we_do/historic_environment/4171.aspx

Useful Web Addresses

Department for Culture, Media and Sport (2011); *Listed Buildings* (web page); at www.culture.gov.uk/what_we_do/historic_environment/3330.aspx

Health and Safety Executive (n.d.); *Guidance* (web page); at www.hse.gov.uk/guidance/index.htm

Planning Portal (2012); *Building Regulations* (web page); at www.planningportal.gov.uk/buildingregulations/

CONSERVATION PLANNING FOR MAINTENANCE & REPAIR