

# Financing the Historic Environment

29-30 March 2017  
Glasgow Grand Central Hotel



## Financing the Historic Environment

2017 is the Year of History Heritage and Archaeology, a celebration of what gives Scotland its unique character and draws people to live, work and visit. Caring for these assets is a collaborative effort across the United Kingdom undertaken by a wide range of organisations, from voluntary community groups to large-scale commercial development, public bodies and local and national government.

These are challenging times for public sector budgets and while the Community Empowerment (Scotland) Act creates the potential for transfer of historic assets to communities there remains a need for the commercial sector to invest in historic places. In a changing economic landscape, an era of rapid technological advancement and the need to mitigate the challenges of climate change there is no escape from the historic environment's need for increased investment.

What are the challenges faced by the investment community in developing historic buildings? How does grant aided investment lever in additional funding and stimulate economic activity? How can local authority and public body asset management make the most of the historic environment? What makes small scale tourist sites financially viable? How are national heritage organisations approaching investment in their portfolios? How can the heritage sector help overcome any barriers?

This two-day conference, organised by Built Environment Forum Scotland, Heritage Lottery Fund Scotland and the BRICK programme run by The Prince's Regeneration Trust, will explore these questions and how local communities can be at the heart of solutions.

**Built Environment Forum Scotland (BEFS)** is an umbrella body for organisations working in the built environment in Scotland. Drawing on extensive expertise in a membership-led forum, BEFS informs, debates and advocates on the strategic issues, opportunities and challenges facing Scotland's historic and contemporary built environment. BEFS gratefully acknowledges the financial support of Historic Environment Scotland.

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

Scottish Charity No. SC 03448 | Company No. 250970

### Heritage Lottery Fund

From the archaeology under our feet to the historic parks we love, from precious memories to rare wildlife...the Heritage Lottery Fund uses money raised by National Lottery players to help people across the UK explore, enjoy and protect the heritage they care about.

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

### The Prince's Regeneration Trust's BRICK programme

The BRICK education programme is designed to support community groups that are trying to save their local heritage and create a better future for their local area. Through workshops, mentoring and online support, BRICK can help groups ensure their projects and organisation are fit to be funded and successfully deliver their aims.

[www.princes-regeneration.org/resources/brick](http://www.princes-regeneration.org/resources/brick)

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# Day One: Financing the Historic Environment

## Wednesday 29 March, Grand Central Hotel, Glasgow

 #HeritageFinance  
@theBEFS @HLFScotland @PrincesRegen  
Wifi: automatic login with email address

09:30 Registration, tea & coffee

10:00 Welcome by Euan Leitch, Built Environment Forum Scotland

Chair: Ros Kerslake, Heritage Lottery Fund

10:15

### **Commercial Investment in the Historic Environment**

Paul Curran, Scottish Property Federation  
Robert Moore, Trevor Osborne Property Group  
Stuart Heslop, Royal Bank of Scotland

Panel Q&A

11:15

Coffee break

Chair: Sarah Mackinnon, Mackintosh Restoration Project

11:30

### **Local Investment**

Sarah Kettles, Conservation Area Regeneration Scheme  
Alan Lodge, Townscape Heritage Initiative  
Robin Webster, Glasgow City Heritage Trust

Panel Q&A

12:30

Lunch

13:30

Chair: Laura Norris, The Prince's Regeneration Trust

13:35

### **Keynote**

Ros Kerslake, Heritage Lottery Fund

14:05

### **Heritage Asset Management**

Richard Cairns, West Dunbartonshire Council  
Stewart Adams, NHS  
Gary Brown, Brymbo Heritage Group

Panel Q&A

15:05

Coffee break

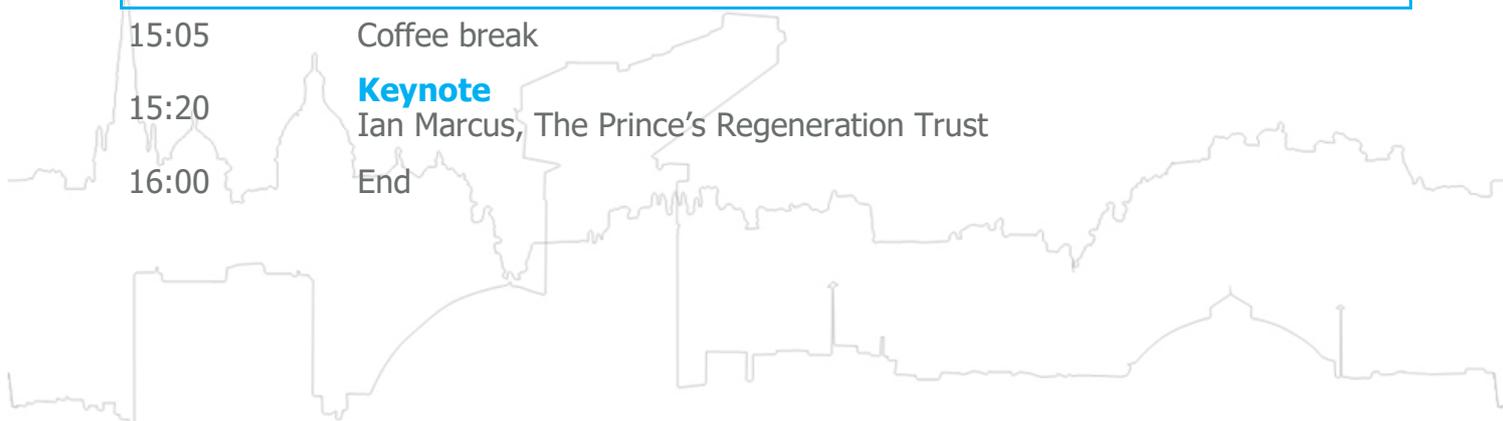
15:20

### **Keynote**

Ian Marcus, The Prince's Regeneration Trust

16:00

End



# Day Two: Financing the Historic Environment

## Thursday 30 March, Grand Central Hotel, Glasgow

 #HeritageFinance  
@theBEFS @HLFScotland @PrincesRegen  
Wifi: automatic login with email address

- 09:00 Registration, tea & coffee
- 09:30 Welcome by Euan Leitch, Built Environment Forum Scotland  
Chair: Paul Jardine, Jura Consultants

09:35 **Heritage Tourism Investment**  
Jana Hutt, Knockando Woolmill  
Martin Hulse, Dunston Staiths  
Paul Higson, Portsoy Sail Loft  
Panel Q&A

- 10:35 **Keynote**  
Adam Gough, Natural Retreats
- 11:00 Coffee break  
Chair: Liz Davidson, Mackintosh Restoration Project

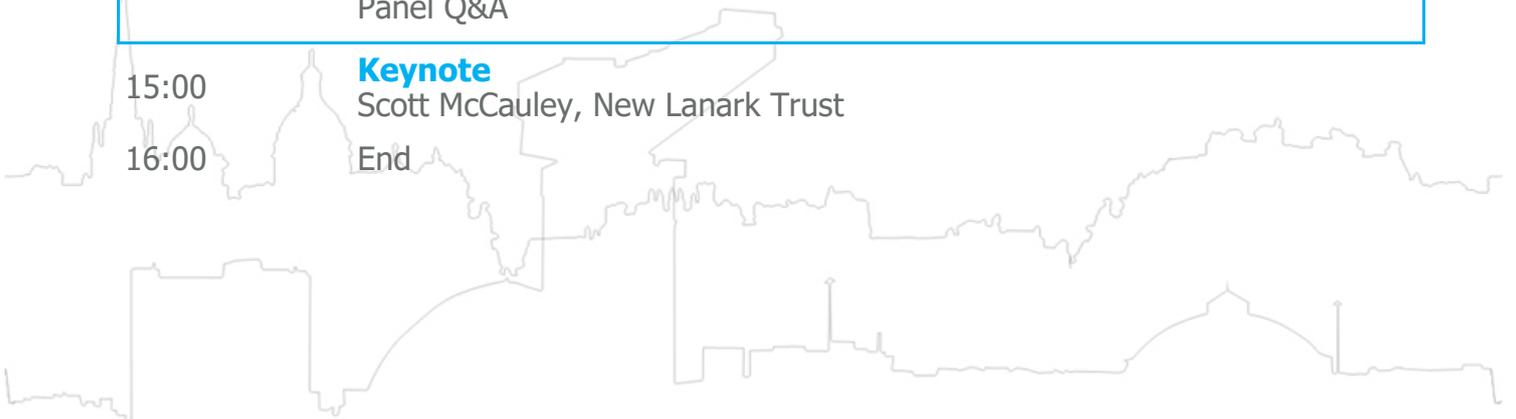
11:20 **Access to Funding**  
Oluwaseun Soyemi, Heritage Enterprise  
Gordon Barr, Architectural Heritage Fund  
Ailsa Raeburn, Scottish Land Fund

- 13:00 Lunch  
Chair: Paul Jardine, Jura Consultants

14:00 **Funding the National Collections**  
Bryan Dickson, National Trust for Scotland  
David Mitchell, Historic Environment Scotland  
Panel Q&A

- 15:00 **Keynote**  
Scott McCauley, New Lanark Trust

16:00 End



# Day One Speakers

## **Ros Kerslake OBE, Chief Executive, Heritage Lottery Fund**

Ros Kerslake joined HLF in July 2016. She started her career as a lawyer before taking on leadership positions in the private sector, including for Gulf Oil and Booker Group. As Property Director of Railtrack, she developed an interest in place and urban regeneration, which have characterised her roles since. Ros went on to become CEO of RegenCo – an urban regeneration company. In 2006 Ros was appointed as first CEO of The Prince's Regeneration Trust and over the next ten years established it as a leading heritage-led regeneration charity. One of its key achievements was saving one of the last working Victorian potteries in the UK, Middleport Pottery. In 2016 Ros was awarded an OBE for services to British heritage and an honorary doctorate from Staffordshire University. She has a degree in Law and Psychology and an MBA.

## **Paul Curran, Chairman of the Scottish Property Federation**

Paul is a Chartered Surveyor with over 20 years' experience and Managing Director of Quartermile Developments. In 2013, Paul led the corporate acquisition of Quartermile with the backing of the private equity fund Moorfield. In 2014, he secured the £82m funding deal with M+G Real Estate for the speculative development of Quartermile 3 and 4 office buildings. This represents one of the largest forward funding deals achieved in Scotland. In 2015, Paul secured Edinburgh's two largest consecutive commercial pre-lets for ten years with back-to-back deals within the £50m Quartermile 4 building. Paul also secured the University of Edinburgh's acquisition of the Category A-listed Surgical Hospital building.

## **Robert Moore, Development Manager, Trevor Osborne Property Group**

Robert is a developer specialising in the regeneration of historic buildings. He is currently responsible for the development of Bristol's Grade II\* Listed Guildhall, Grade I Listed former branch of the Bank of England and part of the Grade II listed Albion Chambers into a 100 bedroom hotel, complete with events facilities and a spa. He has also managed the conversion of a number of historic buildings into residential accommodation both in Bath as a developer for the Trevor Osborne Property Group and in his prior role as a consultant to a number of London based property developers.

## **Stuart Heslop, Managing Director, Real Estate Finance, RBS**

Stuart is currently managing RBS's Real Estate Finance Business in Scotland and North England, Stuart covers the key Corporate Centres in Edinburgh, Glasgow, Dundee, Aberdeen, Newcastle, Leeds, Liverpool and Manchester. The business is responsible for all forms of Commercial Investment (Office, Retail, Industrial, Student, Hotel and other asset classes) as well as Commercial Development activity and Housebuilding and Residential Investment lending across the geography. Stuart has worked with RBS for 30 years and prior to taking up his current role was responsible for Major Corporate Banking and Financial Institutions in Scotland with previous roles including the management of the Commercial Banking business in the north of Scotland, out of Aberdeen, and Oil and Gas Structured Finance prior to that.

## **Sarah MacKinnon, Project Manager, Mackintosh Restoration**

Sarah is a Chartered Building Surveyor and holds the RICS Post Graduate Diploma in Building Conservation and full IHBC membership. She spent 10 years as a Local Government Officer, working in Building Control, Private Housing Standards and Conservation and Regeneration, culminating in a role as Conservation and Projects Surveyor at Gravesham Borough Council. Sarah took up the post of Estates Surveyor and latterly Estates Development Manager, with the National Museums of Scotland in 2003, before becoming Chief Executive of Strathclyde Building Preservation Trust in 2005. Sarah was responsible for restarting the Trust's operations, developing a portfolio of work across Scotland specialising in professional support for local community groups working to save historic buildings. Sarah was appointed Mackintosh Restoration Project Manager in 2015.

## **Sarah Kettles, Conservation Area Regeneration Scheme**

Sarah's first degree was in Geography, where she developed a particular interest in the effect of out of town shopping centres on traditional retail centres. She advanced this interest through employment for CACI Ltd, a specialist in location planning. In 2002 she attended Dundee University where she was awarded an MSc in European Urban Conservation. Since then, Sarah has been involved in a variety of heritage projects, including the project management of the Brechin Townscape Heritage Initiative and Conservation Area Regeneration Scheme. Following this she became Angus Council's lead officer in the development of its Community Asset Transfer policy. Most recently Sarah has been responsible for the development phase of a long distance route -the Fife Pilgrim Way. Sarah is a full member of IHBC.

## **Alan Lodge, Townscape Heritage Initiative**

Alan worked in the private, public and third sectors for over 40 years. He started at the top as Chief Planning Officer for Mombasa, Kenya with Voluntary Service Overseas and successfully worked his way down the employment ladder. He has experience in development and regeneration, specifically involving the built heritage, in Dundee, Edinburgh and Fife. He helped establish and became manager of Fife Historic Buildings Trust in 1997. The Trust managed five Townscape Heritage Initiatives and two Conservation Area Regeneration Schemes between 1999 and 2014 and restored several historic buildings. Wheeled out of retirement to bore the conference with tales of exploits trying to deliver Townscape Heritage Initiatives by whatever means possible.

## **Professor Robin Webster OBE RSA FRIAS**

Robin is an architect who was born in Glasgow. His architectural education was at the University of Cambridge and the Bartlett at UCL. He worked for Gillespie Kidd and Coia architects in Glasgow for a brief period in 1961-62, and ran his own practice in London and Aberdeen until 2005, when he became a partner of Cameron Webster architects in Glasgow along with his daughter and son in law. He is also Professor Emeritus at the Robert Gordon University Aberdeen where he was Head of School from 1984 until 2004. He is currently the Development Consultant at Glasgow City Heritage Trust, where he runs the Historic Building Investment Forum.

### **Laura Norris, BRICK Programme Director, The Prince's Regeneration Trust**

Laura manages the Building Resources, Investment and Community Knowledge (BRICK) programme for the Princes Regeneration Trust. This HLF supported programme offers mentoring and workshops throughout the UK to community groups undertaking historic building restoration. Laura has been working within the Building Preservation Trust movement since 1998 firstly with the Cockburn Conservation Trust and Scottish Historic Building Trust before moving to Vivat Trust.

### **Richard Cairns, West Dunbartonshire Council**

Richard is the Strategic Director of Regeneration, Environment and Growth, at West Dunbartonshire Council. He manages over 1,600 staff and a budget of c £90m with responsibility for: Housing, Economic Development & Regeneration, Business Support, Roads, Transport; Waste Services and Greenspace. He has over 30 years of experience in economic development in the public and private sectors, having previously held posts as Head of Economic Development for a global audit practice, for the Audit Commission in London, and at the City of Glasgow.

### **Gary Brown, Brymbo Heritage Group**

Brymbo is a small rural village in the hills near Wrexham in North Wales, famed for its 1790s ironworks and later steelworks. It's a place whose fortunes have followed those of its industry - the closure of its steelworks in 1990 continues to weigh heavily in the community. Restoring local pride and identity through the conservation and re-use of the 18th, 19th and 20th century industrial buildings and landscape that remain is at the core of Brymbo Heritage Group - a group of local activists who have steadily developed credible and widely supported plans for a mixed use development. Gary Brown is the group's project leader, and he will tell us about the challenges the group has faced so far and how they are overcoming them to bring their plans to fruition.

### **Ian Marcus, Prince's Regeneration Trust**

Ian was Chairman of the Prince's Regeneration Trust for 10 years until its merger with The Princes Foundation for Building Communities last year. He has worked for Bank of America, UBS, NatWest and Bankers Trust/Deutsche, always focusing on the real estate industry. Ian joined Credit Suisse First Boston in 1999 to establish the Real Estate Group, and became Managing Director and Chairman of the European Real Estate Investment Banking. He is a Crown Estate Commissioner, a member of Redevco's Advisory Board, the Senior Independent Director for Secure Income REIT and a Non-Executive Director for Town Centre Securities Plc. He was appointed as a Senior Consultant to Eastdil Secured and Wells Fargo Securities in 2013. He is a member of the University of Cambridge Department of Land Economy Advisory Group.

## **Day Two Speakers**

### **Paul Jardine, Managing Director, Jura Consultants**

Paul has been involved in the Historic Environment for over 30 years. He is a past Commissioner of the Royal Commission on the Ancient and Historical Monuments of Scotland and a past Board Member of SCRAN. He was a member of the Scottish Government's Transition Advisory Board for the creation of Historic Environment Scotland (HES) and served on HES's Audit and Risk Committee before stepping down in 2016. As Managing Director of Jura Consultants he leads a team of 9 providing support and advice to heritage organisations across the UK. Paul has been a guest lecturer at UCL Institute for Sustainable Heritage since 2009 where he lectures on Financing Heritage Projects, the Economics of Heritage, Business Planning and Activity Planning for Heritage.

### **Dr Jana Hutt, Director, Knockando Woolmill Co Ltd**

Jana is originally a geologist and career academic at the University of Cambridge. After moving to N.E. Scotland in the early 1970s, she worked for Highlands & Islands Enterprise in local economic development. She became involved with Knockando Woolmill in 1999 when it became apparent that the only way to save it and the listed textile machinery was by forming a charitable trust which could access funding. Hugh Jones, the then weaver, owner and a neighbour asked her to become involved and she agreed. As a Trustee, Chairman and later Project Leader, Jana was responsible for the planning, fund-raising and implementation of the restoration of the Woolmill. This was completed in 2012 when the Mill opened to the public. Textile production started in 2013.

### **Martin Hulse, Trust Manager, Tyne & Wear Building Preservation Trust**

Martin is a PRINCE II Project Manager working in regeneration with specialisms in heritage, sustainability and the implementation of public art. He has worked in the public, private and third sector and now focuses on the work of building preservation trusts and champions the role of small charitable organisations in making a big impact. Recently he has restored a monastic cell, an old navigational lighthouse, a staith on the River Tyne, and an engine house on a rope hauled railway. Once he has identified a project, Martin takes the building through options appraisal, project development, detailed design, and project delivery. Critical to this is an understanding of the long term impact of taking on a project and dealing with its legacy.

### **Paul Higson, North East Scotland Preservation Trust (NESPT)**

Since joining the NESPT in 2009, Paul has managed the successful restoration of the Georgian Townhouse at 2/4 Old Castlegate, Banff, the £2 million conversion of the derelict buildings at Back Green, Portsoy into the Sail Loft Bunkhouse and developed the NESPT as a provider of a range of consultancy services to Councils, Community Groups and others. Before joining the NESPT, Paul spent eight years as a self-employed Consultant. Work included Project Coordination of the £2.4 million Eastern Cairngorms Access Project, Project Coordinator for the Ballater Railway Carriage Project and work for the NTS, Scottish Enterprise and VisitScotland. Prior to this he spent 13 years in senior management positions with Area Tourist Boards in Grampian, finishing as Director of Operations and Special Projects with Aberdeen and Grampian Tourist Board.

### **Adam Gough, SVP, Natural Retreats**

Adam has been part of Natural Retreats' management team since it was founded in 2006. He currently heads up the Planning and Development of new locations within Europe. Natural Retreats are a luxury leisure operator focussing on sustainable development through sustainable tourism and currently has over 30 locations around the world. Notable highlights include overseeing the redevelopment of John O'Groats including the restoration of the iconic John O'Groats Hotel creating luxury self-catering accommodation along with storehouse café and outfitters. Natural Retreats are currently completing the final phase of the renovation of Lews Castle in partnership with the Western Isles Council. Natural Retreats are also progressing a masterplan for the current facilities at Cairngorm Mountain and are working on projects for future locations in Inveraray and Balnagown.

### **Liz Davidson IHBC, FRIAS, OBE, Mackintosh Restoration Project**

Liz is the Senior Project Manager at the Mackintosh Restoration Project at Glasgow School of Art. Since graduating in Architectural Conservation, Liz has been involved in most aspects of Scotland's built heritage. She was head of Heritage and Design at Glasgow City Council. Previous to that she led the Heritage Lottery funded Townscape Heritage programme to regenerate the Merchant City. Earlier posts include Director of Glasgow Building Preservation Trust, where she pioneered Doors Open Day, and secondment to Historic Scotland where she helped to launch the Conservation Area Regeneration Scheme (CARS). Liz has also carried out case work across Scotland for the Scottish Civic Trust. In 2010 Liz received an OBE for services to conservation and the built heritage in Scotland.

### **Gordon Barr, Support Officer for Scotland, Architectural Heritage Fund**

Before joining the AHF in 2014, he was the Heritage Development Manager for the multi-award-winning multi-million pound Maryhill Burgh Halls regeneration project. Gordon has a academic and scientific software development background, as well as over fifteen years experience managing and contributing to projects related to the social and architectural heritage of cinema and theatre buildings in Scotland. In 2011 he was shortlisted for the Scottish Civic Trust's inaugural 'Civic Champion' award. He is a Trustee of Maryhill Burgh Halls Trust, a member of the Architectural Heritage Society of Scotland, as well as a committee member of the Cinema Theatre Association.

### **Oluwaseun Soyemi, Policy Advisor & Programme Manager for Regeneration, Heritage Lottery Fund**

Seun is based within HLF's Historic Environment Team where he helps shape the Fund's policies and approach to place-making and regeneration across all funding programmes. Seun also manages HLF's Heritage Enterprise, Townscape Heritage and Great Place Scheme funding programmes. Previously, he spent 8 years as a Senior Grants Officer within the South East England team within HLF where he played a key role in delivering the region's bid analysis and post-grant award monitoring function, with a focus on large complex schemes. As a senior member of the team he also contributed to the strategic direction of the region's work including cultivating and supporting relationships with a broad range of sector stakeholders.

### **Ailsa Raeburn, Head of the Community Assets Team, Highlands and Islands Enterprise**

HIE work with communities who are interested in acquiring assets of all types from large crofting, forestry and sporting estates to local shops, hotels, housing and amenity/ recreation uses. Historic buildings are often at the centre of a community and HIE are now working with a number of communities looking to find viable new uses for these buildings that address wider needs within the community. HIE also deliver the national Scottish Land Fund on behalf of the Scottish Government, in partnership with Big Lottery Scotland. This £10m pa fund underpins the financial, legislative and policy commitment of the Scottish Government to the empowerment of communities through asset ownership.

### **Bryan Dickson, Head of Buildings Conservation (Policy), National Trust for Scotland**

Brian is a Conservation Accredited Chartered Building Surveyor. He was responsible for the team who deliver the maintenance, repair and conservation needs to the Trust's estate of some 1600 built structures across Scotland including a wide range of heritage, from castles to crofts, industrial heritage to contemporary architecture across estates and landscapes. In a newly created role, he is responsible for the setting of buildings conservation policy direction and technical operational standards, management of a Scottish Government (through Historic Environment Scotland) grant programme and supporting major projects. Bryan has a Masters in Building Conservation and has had some 25 years of practical, technical, professional and managerial experience within the heritage sector.

### **Dr David Mitchell, Director of Conservation, Historic Environment Scotland**

David has been active in the fields of traditional skills and materials, and digital documentation for several years, and has a particular interest in industrial heritage and the Scottish architectural iron founding industry. Between April 2016 and September 2016, he took on the role of acting CEO for Historic Environment Scotland (HES). He holds undergraduate and postgraduate degrees in earth sciences and a PhD in architecture. Before joining the organisation, he was managing director of a private firm of industrial heritage consultants and contractors. He is an Honorary Professor at the University of Stirling, a member of the Institute of Historic Building Conservation and a trustee of the Scottish Ironwork Foundation and the Stirling Smith Museum and Art Gallery.

### **Scott McCauley, Chief Executive, New Lanark Trust**

A graduate in Marketing from Edith Cowen University, Perth WA, Scott began his career in Theatre Management in the UK, including the Edinburgh Playhouse and Liverpool Empire Theatre. Next he worked for Merlin Entertainments, managing Southend Sea Life Centre before opening the National Sea Life Centre Ireland. Scott went on to lead the Victorian Pavilion Gardens in Buxton, before a move to Atholl Estates as Head of Visitor Services, which includes the iconic Blair Castle. Relocation to Australia brought a spell as a Commercial Lands Specialist for Pilbara Ports Authority. However, his desire to return to UK Heritage & Tourism brought Scott to his current role as Chief Executive of New Lanark Trust in August 2016, where he is also Managing Director of the Trust's three trading subsidiaries.

## Notes

