

## Historic Environment Working Group (HEWG)

Meeting note 24<sup>th</sup> November 2022

Topic: HEWG

Time: 10am – 12pm

Date: 24<sup>th</sup> November 2022

See BEFS [HEWG page](#) for past papers.

**Chair:** Ian Baxter, BEFS Vice-Chair

**BEFS attendees:** Ailsa Macfarlane, Hazel Johnson

### 1. Welcome, Introductions and Apologies

#### Apologies:

Andrew Hopetoun	Historic Houses
Ann Packard	RSA-MCICH
Gordon Barr	Architectural Heritage Fund
Hazel Benza	Landscape Institute - Scotland
Lindsay Lennie	Stirling City Heritage Trust
Sean O'Reilly	IHBC
Tyler Lott Johnson	SPAB

Attended:	
Anna Hart	IHBC
Bill Pagan	BEFS
Diane Gray	NLHF
Diarmid Hearn	NTS
DJ Johnston-Smith	SCT
Euan Leitch	SURF
Frankie Toner	NLHF
Gavin MacGregor	AS
Gwen Thomas	ICON
Jo Lindon	RICS
Jo Robertson	AHF
Jocelyn Cunliffe	AHSS
John Lawson	ALGAO
Judith Roebuck	CoS
Kate Darrah	The Ridge
Kevin McClure	The Ridge
Mark Douglas	COG
Martin Robertson	AHSS
Rob Lennox	CifA
Robbie Calvert	RTPI

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Roland Láposi	BEFS
Sarah Kettles	IHBC/BEFS
Sarah Pearce	HTN
Simon Gilmour	SoAoS
Sue Evans	SCivT
Terry Levinthal	Cockburn Association
Victoria Collison Owens	HCS

2. Agree [previous meeting note](#) (available online) – all necessary actions completed, or to be updated on in BEFS Sector updates.

- Increase in communications from HES around closed sites noted.
- Q: JC – Visitor Safety Group.
- ACTION: CM to contact VSG. **Post meeting note: confirmed that HES are members of VSG and senior staff have access to members area.**

3. BEFS Sector Updates and Policy Updates

- NPF4

### Context:

In responding to the consultation on the initial draft at the start of the year, BEFS view – which was shaped by contributions from across the sector – was that the document contained significant omissions, such as references to key documents and policies for the historic environment, as well as the clear list of benefits that the historic environment assets deliver across multiple policy areas and towards Scotland’s national outcomes. Further, there was seen to be a lack of read across to the **Local Development Planning Regulations and Guidance**, in particular with regards to planning decisions that impact the existing and historic built environment.

There was also concern that the rapidity of the consultation and redrafting process – with consultation and Parliamentary scrutiny running simultaneously and not sequentially – would not allow for views and comments submitted as part of the consultation process to be fully taken into account. BEFS response can be found [here](#).

As such, it should be noted – and applauded – that much of the feedback provided by the sector is recognisable within the revised draft.

### The draft revised NPF4 – overview:

When eventually adopted NPF4 will replace NPF3 (2014) and Scottish Planning Policy (2014) and will therefore be part of the statutory development plan for any given area, along with the relevant Local Development Plans.

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*'This creates a spatial framework for decision making that will support the delivery of a wide range of strategic priorities. In particular, climate change, nature recovery, inclusive growth, the wellbeing economy and child poverty have shaped the approach.'*

Tackling the climate and nature crises, through climate mitigation and adaptation, sits front and centre within the policies in the draft. The revised draft NPF4 represents a significant landmark in recognising the role of the historic environment in tackling climate change; historic environment assets sit within Sustainable Places. Policy specifically advocating the re-use of existing buildings, capitalising on the embodied energy present within them, shows an explicit recognition of how the existing built environment is a central asset in reaching net zero – in particular, Policy 9 d) *'Development proposals for the use of existing buildings will be supported, taking in to account their suitability for conversion to other uses. Given the need to conserve embodied energy, demolition will be regarded as the least preferred action.'*

**Part 1 – A National Spatial Strategy for Scotland** introduces the main National Planning Policy areas: Sustainable Places, Liveable Places and Productive Places (Distinctive Places from the initial draft has been done away with as a separate policy area).

Care has been taken to show how these are all linked; particularly useful is the overview at the end of each introductory section clearly outlining the cross-cutting outcomes and policy links. This goes some way to addressing previous concerns that the historic and existing built environment sit distinct and therefore not fully integrated.

This section also includes details contained within

- National Spatial Strategy (Map)
- National Developments (Map)
- Regional Spatial Priorities

**Part 2 – National Planning Policy** details the individual policies within Sustainable, Liveable and Productive Places.

Further clarity is given in Part 2 by a new addition to the draft which provides an overview upfront of the policy intent and outcomes attached to the individual policies, alongside LDP requirements to support local decision making.

Issues around omissions of references to other key strategies, such as Housing 2040, have been largely addressed – and the impression is of a document aware of the wider policy landscape within which it sits.

For those that are still to sit down and fully take in **Policy 7 – Historic Assets and Places**, an overview is included here:

### Policy Intent:

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*To protect and enhance historic environment assets and places, and to enable positive change as a catalyst for the regeneration of places.*

### Policy Outcomes:

- *The historic environment is valued, protected, and enhanced, supporting the transition to net zero and ensuring assets are resilient to current and future impacts of climate change.*
- *Redundant or neglected historic buildings are brought back into sustainable and productive uses.*
- *Recognise the social, environmental and economic value of the historic environment, to our economy and cultural identity.*

The list of Policy connections included with each individual policy is a practical – and illustrative – approach to identifying just how integrated the various policies are. In the case of Policy 7, the list is long with the historic environment present or referred to in:

- *Tackling the climate and nature crises*
- *Climate mitigation and adaptation*
- *Natural places*
- *Forestry, woodland and trees*
- *Green belts*
- *Brownfield, vacant and derelict land and empty buildings*
- *Coastal development*
- *Energy*
- *Design, quality and place*
- *Local Living and 20 minute neighbourhoods*
- *Infrastructure first*
- *Quality homes*
- *Rural homes*
- *Blue and green infrastructure*
- *Flood risk and water management*
- *Digital infrastructure*
- *Community wealth building*
- *City, town, local and commercial centres*
- *Rural development*
- *Tourism*
- *Culture and creativity*

Reference to proposals needing to be informed by national policy and guidance on managing change in the historic environment *and* the Historic Environment Record (HERs) will be welcomed by many, as will the updated language around potential impact, and strong wording on demolition and the criterion for retention, re-use and/or adaptation.

In summary, first impressions show the revised draft to be a much more accessible and useable document, that seeks to draw clear lines of sight to its own internal policy alignment but also with key external policies and strategies. Efficient use of existing resources is a recurring theme, placing

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the protection and enhancement of the historic environment centrally within what makes good places.

### Delivery:

Alongside the revised draft NPF4, a Delivery Programme detailing short and medium term actions for 2023 post adoption, has also been published. The aim is for the Delivery Programme to initially be reviewed and updated six months following adoption, and then annually.

Some key takeaways are the focus on successful collaboration and a requirement for clear governance, and the Delivery Programme provides an overview of actions to be taken to support the delivery of NPF4:

- governance and collaboration;
- delivery mechanisms;
- infrastructure funding and finance;
- skills and resources; and
- monitoring and evaluation.

This includes the creation of a new a new Planning, Infrastructure and Place Advisory Group:

*‘...a cross-cutting external stakeholder group whose primary focus will be to strengthen the alignment of NPF4, the Place Based Investment Programme and infrastructure investment. Specifically in relation to NPF4, the remit will be to oversee and advise on the delivery of the spatial strategy, National Developments and national planning policy.*

Read the full Delivery Programme [here](#).

Overview of comments from the group:

JL- ALGAO:

- Generally positive, lots of concerns have been addressed
- Could be better cross-over with Natural Environment
- Glossary doesn't include HERs
- Offsetting – could this have unintended consequences, especially for archaeology?

RC- RTPI:

- Response can be seen here: <https://www.rtpi.org.uk/consultations-rtpi/2022/november/rtpi-scotland-response-to-revised-draft-national-planning-framework-4/>
- Evidence session and Minister to be called for evidence
- Broadly supportive. Usability is better. Content not vastly changed
- Credit to SG colleagues, 427 changes.
- When it goes to parliament there will be no further amendments
- Focus on delivery programme. **Minister wants feedback from stakeholders**
- The costs and BRIA not accurate, working with HOPS to make it better

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- Delivery Programme... no one saw a draft, so lots not in there - important things that need clarifying. SG a lot to do to fill in the details
- A lot of guidance touted for short to medium term with the actions but the transition arrangements are non-existent. Lot of concerns in short term – raft of legal challenges.
- Important areas on infrastructure and place – still needs work
- No infrastructure investment plan alignment to this

TL - CA:

- Overall view – positive
- Issue of coastal places and planning not been addressed. Climate change – sea change rises are coming. Should be developing a retreat strategy for coastal areas, not seeking development of coastal areas susceptible to flooding

DH - NTS:

- Improvement which is good.
- A lot of what was there already, been put back in
- No reference to planning circular, planning guidance
- Table one – be good to see OPiT referenced
- LDP – local planning authorities – does the LDP take precedence? (RC – the more recent plan/policy will take precedence)

### • Our Place in Time refresh

- Comprehensive rewrite post OPiT CEO forum comments - significant re-draft to take on board comments.
- The draft is tight, focused, it has the ability to engage with government and support a sustainable sector and it will usefully speak in dialogue with SG aims.
- A short 5 year strategy – not everything will end up in it
- Rapid timetable set by SG. It is currently in a positive place
- BEFS will hold a number of consultation sessions
- Consultation due to go out on 28<sup>th</sup> of November for 12 weeks (Now launched, [here](#).)
- Discussion on delivery and what this might look like later in the session. This will involve a quick review of the previous KPIs and evaluation

*TL: HES board meeting to discuss this due 24/11.*

### • Tenement Maintenance

**Working Group on Tenement Maintenance** convened by Graham Simpson, MSP  
Scottish Parliament, 26<sup>th</sup> October 2022

Report from last session of Parliament Tenement working group:

3 main recommendations:

1. Mandatory inspections every 5 years
2. Inspection report publicly available

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### 3. Compulsory owners' associations establish building reserve funds

Purpose of meeting to look at activity since report, and to see if anything group can urge SG to do now.

#### Changed context

- Declaration of a Climate Emergency – April 2019
- Infrastructure Commission Recommendations – January 2020 (Homes as part of infrastructure)
- Heat in Buildings Strategy – October 2021
- Housing to 2040 – March 2021
- National Planning Framework (NPF4) – tbc Autumn 2022

Our understanding of net-zero aims and the climate emergency have sharpened significantly over the last few years.

Related policies listed above are only some of those which action, in relation to tenement maintenance, can **directly support**:

- Our housing stock is directly listed as part of our infrastructure.
- Work around tenements will be essential to meeting Heat in Buildings targets

These policies now provide additional levers, and impetus to progress this work however complex policies demand complex actions, and we've been seeing significant work take place across building standards, heat in buildings teams, and wider housing legislation.

Ongoing – SLC work. Input to Housing Bill, Heat in Buildings Strategy both underway

What can we ask SG to move on, that might not require legislation? No new legislation until next parliamentary session.

Challenge to group: Think creatively, are there solutions that don't require primary legislation

#### Next steps and ACTIONS for Tenement Working Group:

ACTION: Secretariat to keep a master schedule of related and ongoing work.

ACTION: Letter from this group re changes to bill. Agree, share and send in next couple of weeks.

ACTION: Questions about progress of written review to be asked by Ministers.

Comments:

JC: Q- has workplan stalled? Publicity needed in relation to what we hope will be coming, for tenement owners.

- **Policy Consultations**

#### NEW BUILD HEAT STANDARDS PT 2

BEFS welcomes the general principles of the proposals but considers that there is still some work to be done towards a broader culture shift within the construction industries, as well as Scotland's

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home-owners, businesses, suppliers, and manufacturers towards a fabric first – *incorporating* a maintenance first – approach to support the transition to net zero.

### LAND REFORM NET ZERO NATION

BEFS response recommends that the symbiotic nature of the existing historic (including the built environment) and the natural environment is recognised and fully integrated within land management.

Read BEFS Members, [RICS response](#)

- Open Consultations

#### The Future of National Parks in Scotland

Scottish Government

Closed 30 November 2022

#### Responsible Tourism Framework

Historic Environment Scotland

Closed 30 November 2022

- **IB:** Implications mostly for HES, but also for wider sector.

#### Developing a Scottish Tax to replace the UK Aggregates Levy

Scottish Government

Closes 4 December 2022

#### Delivering our Vision for Scottish Agriculture. Proposals for a new Agriculture Bill

Scottish Government

**\*\*Deadline extended\*\* Now Closes 5 December 2022**

Comments:

- **JL:** Heritage: Nothing in it previously, and nothing in it now – letter to Minister raising concerns.
- **DH:** Hook at beginning talking about landscape. SG looking to model itself on Europe. Welsh model best to explore.
- **AM:** **Vision for Agriculture letter. BEFS will be signatories.** It is a clear ask around Heritage not being present. ClfA drafted, using Welsh example.

#### World Heritage Site Management Plan 2023

Edinburgh World Heritage

Closes 12 December 2022

#### The Scottish Parliament's Local Government, Housing & Planning Committee inquiry into Community Planning



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There are two different surveys: the first call for views is aimed at members of Community Planning Partnerships (organisations or individuals). The second survey is aimed at other organisations or individuals who have an interest in community planning.

**Closes 30 December 2022**

ADDED :

Ownerless properties in the crown estate

**Closes 16 December 2022**

Comments:

- **EL:** Ownerless properties in the crown estate. How crown estate has properties that may have a community interest.
- **JR:** AHF has drafted a response. **Can share.**

### 4. Cost of living

Discussion:

**EL:** SURF members of poverty alliance. Situation is catastrophic. Survey before the mini budget – discussion around warm hubs. Commercial rates of energy, not affordable.

**DH:** Membership (members spend etc) model can be about visitation, and public support – impacts vary. Post Covid properties opening up – this will impact recovery. Budget – have to scale things back. Savings - not replacing staff and scaling back on spend. Rising cost of materials and costs.

**SE:** SCT Board has agreed an emergency lump sum payment to staff and when it meets in December will consider a Cost of Living paper at SCT looking at what further support may be possible.

As a sector we are facing similar issues. Would it be helpful to develop common messaging about the disconnect between planning assumptions and actual costs of delivering the services we planned to provide, and to flag the risk of the sector not being able to retain staff leading to a capacity shortage and skills and experience being lost to sector if talented people are forced to move to better paid work outside the heritage sector?

**TL:** Cockburn Association made the decision to keep office open. **Warm-desking offer.** Cost of living crisis not a temporary phenomenon. Will be in to 2030 for taxation reduction, and energy uplift may be longer terms too.

Long term changes to cost profiles we will all have to make. Institutions will have to close facilities. Streamlining of cultural agencies organisations like HES for example – changed and diversify income over the past 6 years to more focus on commercial modelling.

- Will we see a push towards deregulation as a means of addressing decreased investment activity?

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**MD:** Rise in energy related applications that were being denied on policy grounds being overturned by councillors; more applications will be coming in changes for energy efficiency measures that wouldn't usually have been approved. Upgrade insulation.

**EL:** Been asked to prepare for 10% cuts for next year. Model for 10, 20 and 30 %. Any stance that prevents improving fuel poverty – heritage will be unpopular if a blocker. Heritage sector has to be careful how it positions itself here.

**DL:** Working with NatureScot and SG on biodiversity strategy. Biodiversity targets could be hit by private investment - on what terms and with what objectives. If private sector is seen as solution then SG will seize on that.

**JR:** Question around unintended consequences. **If anyone doing further work AHF is interested to hear more.**

**SE:** Do we need to generate positive publicity and information on 'doing the right thing' re insulation, double- glazing etc with some costed examples?

**DH:** And the costs of doing the wrong things (damage to fabric, damp) if not properly specified and installed.

**GM:** Cuts and services - how do we mobilise that arts culture and heritage fits in to wellbeing agenda? Need to make sure we can maintain the services.

**RC:** Believe the DPEA are expecting 30% real term cuts in the next 3 years - could create significant issues for the planning appeals system.

**ACTION:** BEFS to look at sector advocacy in this area during 2023, keeping the conversation going.

## 5. Our Place in Time - Delivery

*Group discussion using HES analysis of the previous KPIs and the findings from earlier engagement.*

Questions for discussion:

- Throughout the engagement workshops we held across Scotland, participants asked for regional opportunities and mechanisms to help deliver the strategy. Do you have suggestions on how such a regional approach might work?
- If applicable, what role do you think you will have in delivering these actions?
  - None
  - Be part of a thematic action group that delivers against specific areas of the strategy
  - Be part of a steering committee that oversees delivery of the strategy
  - Be part of a regional action group that delivers against specific areas of the strategy
  - Advise/consult on strategy
  - Endorse the strategy via my organisation

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- Take part in follow up workshops
- Other (please explain in the comment box)
- **What structures and mechanisms are needed to oversee delivery of the historic environment strategy?**

### Key points from discussion:

- Charitable status and economic obligations. Red square in KPIs – should be in more of them. Surprised that HES don't put a higher price in the external economic culture
- Example of Local Authorities using OPiT to develop teams' work plan. Way of making a national strategy live, possible to attach activity to the KPIs - using practical examples, a great way of showing what is going on, seeing alignment. Look at local or regional examples within these categories.
- Question from CEO Forum- where do local orgs and small to medium enterprises see themselves within the strategy and see tier contribution. Brings clearer understanding of wider strategy.
- A lot of work IS at local level. Potential for disconnect between the strategy and reporting back – needs to be addressed.
- Previous KPIs – question of the single red 'state of the HE'. How can others be green?
- Need to have a realistic view of what the impact of the strategy is.
- Regional delivery is good. Centre giving up control...
- Question of narrative around RAG and what is the baseline? Behind these outcomes, what are the outputs and activity.
- Individual orgs will have different assessments of the KPIs (some would be different colours for the same KPI). Subtlety of what is sitting behind the chart and RAG is lost at a local level.
- Simplest way to align work is to make what is aligning what is being asked to report on when *claiming grant*. Alignment at application to demonstrate where activity contributes
- Funding reporting has to link, based on OPiT.
- Reporting back – Resource issues around annual reporting.
- Idea of nested scales, national and local are integrated. Forms of innovation - what does the regional scale look like (will be different)?
- How will we define regional?
- Without KPIs having a baseline monitoring won't work. Sector is weak when it comes to data and data management.
- Useful to call for a new SHEA? Meant to be published every 2 years, was published 4 years ago.
- Good to see the regional/local dimension.
- Reporting mechanism – does OPiT have a role to play if you can't see delivery?
- More transparency around the OPiT process, groups and reporting all key.

## 6. Organisational Updates from Members

IB:

-HES has advertised 5 posts on the board. Advertised via public appointments website.

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-Data management within sector – 3.1mil research programme with Arts and Humanities Research Council (AHRC) around capturing value around arts and heritage. Call for research on C&HC: [https://www.ukri.org/opportunity/research-culture-and-heritage-capital-with-an-interdisciplinary-team/?\\_ga=2.155565627.1014067072.1669287341-1632537081.1643029713](https://www.ukri.org/opportunity/research-culture-and-heritage-capital-with-an-interdisciplinary-team/?_ga=2.155565627.1014067072.1669287341-1632537081.1643029713)

-BEFS AGM on Dec 7<sup>th</sup>.

-Craig Mearns – was pleased to have attended HEWG and keen to come to another in the new year.

-DCMS continuing with developments around cultural and heritage capital assessments <https://www.gov.uk/guidance/culture-and-heritage-capital-portal>

**DH:** Recruiting for building surveyors. Team had downsized but approach changed. This is now being recruited internally. NTS building review - will probably have to look at sites off the back of this – decisions around access and closures. A bit behind HES, but it is coming.

**SOC:** Last HEWG as starting in post as HES head of grants. Replacement recruited and will be in place at SCT 9<sup>th</sup> January.

*Group wishes all the best to Susan in her new role.*

**JC:**

-Asked to raise whether HES understands the impacts of closure of sites on communities. Owners of buildings being asked to take actions. Message is that HE and buildings are inherently unsafe. This has a knock-on effect on local business. Unclear when the PICS will be opened. Does Peer Review meeting still take place?

-National strategy for the sector – being written by HES. How does OPIT relate to the organisational ecosystems?

-PICS - points from May meeting: legal context and timelines, risk assessments, PIC peer review group still not clear. How will HES come out of these closures? Craig Mearns to address, Terry Levinthal to take to HES board. High Level maintenance meeting of 3<sup>rd</sup> November was cancelled.

**TL answer:** Peer Review meeting still exists and will be going forward as planned. JCs points have also been raised. Keeping communications clear is important.

**DG:** Updates on NLHF new 10yr strategy due to come out early spring

<https://www.heritagefund.org.uk/news/how-you-are-shaping-our-new-10-year-strategy>

**SP:** Victoria and HTN will soon be publishing the summary of research pilot into the challenges facing rural communities taking ownership of church buildings. Please look out for it!

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**Next HEWG:**

**16 February 2023**

**10am – 12pm (in person tbc)**