

Conservation Plans

A guide for the perplexed....

So what is a conservation plan?

A document which explains the significance of a site, identifies how that significance is vulnerable and sets out policies for retaining that significance in any new use, management regime or alteration.

But that's an ordinary management plan.

No – because it is explicitly driven by our understanding of why a place is important, and it sets out to show not how a place will be managed, but how its SIGNIFICANCE will be managed. The Conservation Plan is the assessment stage of a management plan. The Management Plan sets priorities, immediate action program and funding.

Conservation Plans include what you need BEFORE you take major decisions. Management action can then follow. Conservation Plans and Management Plans nest very happily. As do Conservation Plans and Business Plans, Options Appraisals, New Design or Development Plans.

All right, that is more like a Feasibility Study.

Wrong. A feasibility study is normally an assessment of the *financial* and *market viability* of a specific scheme e.g. a visitor centre.

A Conservation Plan should step back from a scheme and take an independent view. A scheme can grow out of a Conservation Plan, but not vice versa. *Remember, a Conservation Plan is NOT a post-hoc justification for a scheme.*

If they're so good, why haven't we done these before?

We have, and do all the time, but in different ways. Examples include:

- Conservation Area Appraisals
- Local Plan Policies
- World Heritage Management Plans
- Listed building management plans
- Conservation plans for historic gardens

Each approach shares the common thread of assessing significance. Conservation Plans take this a step further by explaining how that significance will be managed.

However, a conservation plan is **not**:

- A quinquennial inspection or condition survey
- An archaeological assessment of one proposed scheme
- A development plan

So why do I need one?

If you are applying for HLF funding you may be asked for one. Otherwise, they are very useful for managing complex sites with more than one type of heritage, or before you risk a major financial investment or new work at a historic site.

But I know all about my site already. Can't I just write it myself?

Probably, if you have time to step aside from your day to day workload in order to search through the archives, sort out the phasing of the site, can balance ecology, archaeology and history, for example, are up to date with current legislation, can write well and have plenty of time to organize consultation. If not, get help.

Great, send me a list of consultants.

Not so fast. Before even commissioning one, take time to think about the site and how you want to use the plan, how much detail you need and what skills you need. You will need to bring any partners in on the discussion and then begin to write a brief. Once you have done that, you can think about the right consultant.

Fine. Once I have a brief I'll ring my architect.

Yes and no.....you could ask an architect to co-ordinate one. But Conservation Plans require someone with a very broad knowledge of issues. Depending on the site, they might need to consult (and listen to!)

- An architectural historian (importance of site)
- An archaeologist (assessment of physical fabric)
- An architect (results of condition survey, design opportunities)
- Other specialists (paint, fixtures, ecology, collections, etc.)
- Engineer
- Planner (to relate to local planning context)
- Business advisor/marketing staff
- Operations manager

The most important skills are that of coordinator. Find someone with the breadth of experience to understand the various issues and pull them together in a balanced way. Good writing skills and illustrations also matter.

Sounds frighteningly expensive. Surely it is better to spend money on repair.....

Of course. There is no doubt that day repair and maintenance are the best use of money on any historic site and this should be your first priority.

But if you face difficult decision – new development, problems managing visitors, conflicting types of significance, major funding application – a Conservation Plan can be useful. If nothing else, the data you collect will be useful in the future.

The cost of a plan depends on how complicated the site is, how much information you already have and how you want to use the document. If you are contemplating major works, the cost of a plan should be less than 5% of the total works package.

Ok, Ok. But I need one ASAP.

Sorry. One of the important factors about Conservation Plans is that they should be a participatory process. They involve drawing together different views, and obtaining consensus of stakeholders. The strength of a conservation plan is directly proportional to the amount of consultation and the number of people prepared to sign up to it. Stakeholder dialogue!

Do I really have to go the whole hog?

Not necessarily. Why not start with a quick and dirty Conservation Statement? A shorter document, which sets out what is on a site, why it is important, what issues you might face and what you should do next. If

you are thinking about scheme, include a mitigation table. It won't be a full Conservation Plan, but will get you thinking.

Sounds too difficult.... what's in it for me?

As the owner or manager of a property, a clear understanding of why a site is important, less uncertainty about conservation issues and a better framework for risk assessment. It should enable you to build conservation issues into development proposals at the outset, rather than being unpleasantly surprised at a later date. As a statutory agency or local planning authority, the advantage is that you have the confidence that the building manager understands the site and has taken ownership of conservation issues. Conservation becomes a partnership rather than an adversarial process.

Won't it just sit on the shelf?

Yes, if you allow it to. No if you begin to use it in a systematic way as a basis for Impact Assessments and for influencing new design. No, if you continue to update it and add to it. No if you use it as a basis for discussions with partners and for reducing risk.

Is that it then?

Sorry. A Conservation Plan should provide the framework for an ongoing program of review, perhaps every five years.

Ok, I'm convinced. How do I find out more?

Heritage Lottery Fund publishes Conservation Plans for Historic Places, which is available free from them (0171 591 6000). ICOMOS UK stock a useful guide called *The Conservation Plan* by James Semple Kerr (0181 994 6477).

Can I see a model plan?

Tricky. There are good plans published by Kerr for Australian buildings, but few UK examples in the public domain yet. I have a collection of plans which can be consulted, but not taken away or copied. A number of consultants may be able to let you have copies of their plans.

Help, I am depressed. Who can I talk to?

Your HLF advisor, or statutory inspector (EH, CADW, Historic Scotland, Conservation Officer) should always be the first port of call when talking about a specific Conservation Plan for a designated site or building.

I am developing a Standard Brief, which *you can adapt to your own requirements*, which includes quite a lot of practical detail on commissioning plans as well as checklists for different types of sites. This can be emailed to you.

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