

HERITAGE 2020

**Heritage 2020: strategic priorities for England's
historic environment 2015-2020**

Historic Environment Forum
Heritage 2020 Framework

Foundation document, March 2015

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INTRODUCTION

- 1.1 People in England value and appreciate their historic environment.
- 1.2 The historic environment is “all aspects of the environment resulting from the interaction between people and places through time, including surviving physical remains of past human activity, whether visible, buried or submerged, and landscaped and planted or managed flora” (National Planning Policy Framework, 2012).
- 1.3 The historic environment contributes to well-being in society and provides millions of people with enjoyment, inspiration, learning opportunities, mental and physical health benefits, and sense of place and identity. Over three quarters of adults regularly visit heritage sites and some 4.4m are heritage volunteers: almost all meet new people through this activity and one in three report an increase in self-esteem and confidence in their abilities. Seven out of ten adults believe that heritage sites are important to the local community and HLF volunteers agree that their neighbourhood is a place where people from different backgrounds can get on together.
- 1.4 The historic environment is part of our nation's heritage, which includes tangible aspects such as monuments, buildings, historic places and landscapes in which we live our daily lives, as well as collections/museums, libraries, galleries and archives etc. The modern concept of heritage also extends to cover less tangible elements such as oral tradition, folk memories, language and other cultural traditions. This document focuses on the tangible aspects of the historic environment, but its priorities and issues intersect with this wider definition of heritage.
- 1.5 This framework sets out the shared strategic priorities for organisations working together to maximise the public benefit of the historic environment in England. It has been put together after extensive consultation and debate, and builds on the successes of the National Heritage Protection Plan 2011-15, published by English Heritage in 2010.
- 1.6 The National Heritage Protection Plan focused on heritage protection which delivered through the care and maintenance of heritage assets; through voluntary, not-for-profit, philanthropic, developer-funded and academic contributions; and through the intervention of local and national government by means of policy and practice which sustains the significance of the historic environment for public benefit.
- 1.7 As a result of extensive consultation, this new framework is broader than just protection. It defines five themes through which collaborative action can bring the fullest range of resources to bear on the tasks that have been identified as of greatest urgency to sustain and promote the historic environment of England, encourage access and broaden knowledge for a variety of audiences.
- 1.8 The framework does not aim to be comprehensive in describing all the activities of the heritage sector, but focuses on the areas where collaboration is necessary to deliver public benefits.

VISION FOR 2020

- 2.1 Heritage 2020 is designed to give new impetus for concerted action in the heritage sector with public, private and independent interests collaborating closely, pooling intellectual effort and coordinating financial resources, to achieve far more than is possible by solo effort.
- 2.2 Over the next five years our commitment to the Heritage 2020 framework will achieve a step change in the understanding, valuing, caring and enjoyment of the historic environment of England.
- 2.3 Our vision concentrates on five strategic areas:
- Discovery, identification & understanding
 - Constructive conservation and sustainable management
 - Public engagement
 - Capacity building
 - Helping things to happen

To ensure we make progress, each of these areas will be developed further by a cross-sector Working Group looking at new ways of working on the following priorities.

2.4 Discovery, identification & understanding

- By 2020 we will see compelling new discoveries and stories emerging from investigations in ways that are more readily accessible to the public; we will know far more about what happened in the past; more gaps on the heritage map of England will be identified and filled.
- Joint working with the higher education sector will be extended and strengthened to address the strategic and front-line priorities for the historic environment.
- Understanding of the historic environment will be recognised as a valuable and integral contribution to the growing knowledge economy.
- Greater understanding of the risks to historic environment will inform preventative conservation measures and policies.
- More people will find fulfilment by taking part in learning and discovery. A wider range of national and local communities will take greater responsibility for research and for sharing their knowledge.
- There will be a significant increase in the level of public access to knowledge and information.

2.5 Constructive conservation and sustainable management

- By 2020 there will be ever more effective management of the historic environment through the planning system.

- The historic environment sector will continue to demonstrate its role in promoting economic growth and be increasingly recognised as a positive contributor.
- We will have improved the resilience of historic assets to the impacts of climate change and social and economic forces for change.
- Heritage's owners and government will jointly recognise the need to fund maintenance adequately.
- There will be a shared understanding of how best to adapt the built environment sympathetically, to secure its future and conserve its historic significance through new use.
- The overall condition of the historic environment will be better than it is now and cherished assets will be in beneficial use. Heritage at Risk registers will help monitor progress.

2.6 Public engagement

- By 2020 public engagement levels will be significantly higher, especially among currently under-represented groups, as a result of programmes and strategies which promote people's entitlement to connect with the historic environment.
- A more diverse range of people will be working or volunteering to care for the historic environment and making a formal commitment through membership of national and local heritage bodies.
- Communities will be more actively engaged in the planning system as it affects the historic environment. For example through producing local lists, conservation area appraisals and Neighbourhood Forums as well as through commenting on planning proposals.
- The potential of formal and informal education to increase participation among children and young people will be better understood and sustainable programmes/resources will be established to link heritage organisations to local schools.
- There will be stronger links between the historic environment sector and a wider range of non-heritage organisations sharing similar objectives, with the benefits people experience from engaging with the historic environment understood, resourced and delivered in a wider strategic context.

2.7 Capacity building

- By 2020 we will have agreed and, where required, begun to implement a new sustainable model for delivering local historic environment advice, supported by better and more accessible Historic Environment Records.
- Better skilled and qualified heritage practitioners and craftspeople will have greater access to continuing professional development and workplace learning. Employers will see workforce development as an everyday responsibility and business need and be supported to do so.

- Approaches to training will be based on a good understanding of need across the sector and amongst owners and developers. Practitioners will be cross-disciplinary and, with elected members and other decision-takers, will be less risk-averse, showing more confidence in their judgements and a greater willingness to be innovative.
- Advice, guidance and training for the independent heritage sector will be improved. An increasingly effective civil society will be able to take action at national and local level.
- Owners will have access to better understanding to fulfil their central part in managing heritage, be more confident in their rights and responsibilities, understand the long term benefit of employing skilled contractors and feel more confident in commissioning professional advice.

2.8 Helping things to happen

- By 2020 the evidence base demonstrating the social and economic value of the historic environment will be refined, developed and well-grounded in collaborative research and evaluation.
- A new Government policy statement on the positive contribution made by the historic environment will have been published with sectoral and cross-departmental support.
- The extensive and collective impacts of activities undertaken by those outside the heritage sector will be better understood by the sector and by those decision makers themselves.
- There will be a clearer understanding in central and local Government of their direct responsibilities and their indirect, facilitating role.
- Heritage organisations will be more confident in their advocacy, and in many cases ground-breaking in their use of digital media to get across the importance of the historic environment.
- A greater breadth and diversity of advocates for the historic environment will include a range of new groups with newly discovered interests in the historic environment.

KEY STRATEGIC PRIORITIES FOR 2015-2020

3 Discovery, understanding and identification

- 3.1 Our historic environment is dynamic: not static. Each year we discover previously unknown sites, learn more about the assets with which we are already familiar and gain new appreciation of aspects of the historic environment that were once neglected. Our understanding of what happened in the past has been transformed by research in recent years. Advancement of knowledge is the cornerstone of our ability to care ever more effectively for heritage assets through the planning systems and

through local and national designation. New understanding is fundamental to people's engagement with their historic inheritance and their appetite for discovery continues to increase.

- 3.2 In the last few years, for example, we have revolutionised understanding of the earliest farmers in England; reinterpreted the meaning of Stonehenge; discovered forgotten evidence from the First World War; and acknowledged the contribution to our heritage of the motor car. A shared passion for discovery defines and unites our sector and supports our sense of future direction. Our knowledge derives from many different sources and needs to be shared to support decisions about what our culturally diverse society wants to engage with, protect and pass on to future generations.

Key achievements over the last decade

- 3.3 Alongside the enhanced understanding of individual historic sites and buildings, recent years have seen a move towards building more strategic understanding of the historic environment to help us manage it intelligently and guide decisions about protection and investment. For example, faced with large scale coastal change, we have sought to develop an overview of England's coastal heritage and the threats to it before we attempt to rescue individual sites. This overview will guide our thinking for many years to come and ensure the best use of limited resources.
- 3.4 Alongside a continuing contribution from the public sector, we have witnessed a revolution in the knowledge provided by individuals, communities and the private sector. The private sector contribution has been stimulated by a planning regime that acknowledges that understanding should precede and inform change and has resulted in an unprecedented increase in the generation of information through thousands of developer-funded investigations. Local communities have increasingly been encouraged to identify and protect the heritage they value, for example through neighbourhood development forums, local lists and greater engagement in conservation area appraisals.
- 3.5 The contribution by individuals and communities has been energised by acknowledgement that 'experts' do not have a monopoly on understanding, by challenges to orthodox views on what comprises heritage and by recognition that, in a plural society, approaches to the historic environment need to reflect the widest range of perspectives and values. The Richard III project, for example, was instigated and financed by individuals, executed by professionals and, though a keen media interest, has led to increased public interest in our history nationally and locally in Leicester.
- 3.6 We have also transformed the contribution made by heritage science, which increasingly provides the means by which we can pose and answer radical new questions about the historic environment and its protection and use in a fast changing world. Major innovations in our ability to gather, share, analyse, interpret and discuss new information have been supported by rapid advances in digital technology. For

example, our ability to remotely understand heritage hidden below the ground or below the sea has been transformed in recent years.

Main priorities for sector collaboration over the next five years

- 3.7 The following themes are identified as priorities for *collaborative action* by the historic environment sector, working together through the Historic Environment Forum:
- 3.8 **Building stronger bridges with the higher education sector:** there is a long tradition of collaboration between researchers and others in the heritage sector. Recent years have seen further rapid growth in co-operative research and training initiatives. It is important to strengthen these links to enhance our ability to protect heritage and understand its cultural, social and economic value within our plural society. To achieve this, the Historic Environment Forum will work closely with the UK Research Councils and the National Heritage Science Forum to enhance collaboration and secure the greatest impact from heritage research on practical challenges.
- 3.9 **Developing a more strategic approach to risks and opportunities:** much of our heritage is safe and well managed, but other aspects are at risk of damage caused by environmental, climatic, economic and social changes. We need to develop a better understanding of current and impending changes to ensure public policy on heritage is as effective as possible and resources are targeted most efficiently. The Historic Environment Forum will work to improve our collective ability to assess risks - particularly the impacts of development pressure; neglect; and major climatic, societal and environmental changes - and to capitalise on opportunities. We will extend the categories of heritage for which risk is regularly assessed and seek to identify risks and opportunities as early as possible.
- 3.10 **Addressing undiscovered and under-appreciated heritage:** because much of England's heritage remains to be discovered or to have its value to society confirmed, its recognition, recording and evaluation remains the vital first step in ensuring its effective conservation and potential future use. Without this we cannot be sure that we are always addressing the most pressing needs in statutory protection or conservation. The excitement of this process of discovery, detection and revelation remains an essential part of the public appeal of heritage. The Historic Environment Forum will work to encourage all parts of the sector to develop an ever-better understanding and appreciation of the historic environment and its widest possible communication.
- 3.11 **Securing maximum value from discoveries by the private sector:** the private sector is now a major creator of knowledge about our archaeological and built heritage but cross-sector action is required to ensure that this information is secure and accessible in the long term. The Historic Environment Forum will work closely with agencies, local authorities and the private sector to help to ensure this information is secure and digitally accessible to all, now and in the future.

4 Constructive conservation and sustainable management

- 4.1 One of our primary objectives is to manage, protect and promote our historic environment for public benefit. A well-managed and conserved historic environment secures environmental, economic and social benefits. Realising these benefits is a shared responsibility. Conservation depends on the skills, support and resources of a wide range of organisations and individuals, many of whom would not consider heritage to be their primary business.
- 4.2 Conservation covers a spectrum of approaches, from public guardianship to bold schemes of adaptive reuse. It includes recognising what is important through formal designation (national and local, statutory and non-statutory); making changes through the planning system; and carrying out repair and maintenance.
- 4.3 Conservation is about encouraging appreciation and good custodianship of historic assets. This can be achieved through understanding, sympathetic use and regular maintenance. A conservation-minded approach to managing change will ensure that the special qualities of a place are respected. Conservation allows scope for creative additions, provided new work is thoughtfully designed and well executed. Managing change based on understanding the values and significance of heritage assets is now enshrined in the National Planning Policy Framework.
- 4.4 Repair and conversion are sustainable forms of development, protecting past investment of effort, energy and materials and minimising the need for new construction materials and waste. It is estimated that England's built heritage construction sector accounts for £11bn in GDP and supports 500,000 jobs. Adding management, insurance, fees, archaeology, and all other non-construction costs, the total built heritage economic activity is considerably greater. Owners also pay substantial sums in VAT and other taxes.
- 4.5 Heritage also promotes growth. Well-maintained, distinctive historic places attract businesses, investors and visitors and generate increased spend in the local economy. Built heritage tourism directly accounted for £14.0bn of economic output in 2010, rising to £26.4bn when natural heritage is included. Experiencing heritage was the main activity for 69 million day visits in the UK in 2012, and 48% of inbound visitors to the UK in 2011 visited a castle or historic house during their stay. Heritage has a key role to play as tourism is predicted to grow by 3.8% a year until 2018 – faster than retail or manufacturing. Businesses based in historic buildings often out-perform those in less exciting buildings, generating higher gross added value per annum, and inspiring creative products and services as well as new forms of use or re-use.

Key achievements over the last decade

- 4.6 The development of core best practice policy and guidance to steer the sustainable management of the historic environment, to support credible and consistent decision-making, and to inform heritage-led regeneration across the sector. Examples include the NPPF, English Heritage's Constructive Conservation policy and *Conservation Principles, Heritage Works*, SPAB Technical Advice, the Building in Context toolkit (EH

and CABE), *Standards and Guidance for the Stewardship of the Historic Environment* (IfA, IHBC and ALGAO), the UK Marine Policy Statement, and the *Green Guide to Historic Buildings* (PRT).

- 4.7 Private owners, developers, charities and the public sector have invested billions in the conservation of the historic environment over the last ten years, levering in additional investment to local economies. This outlay has secured both the iconic and the local, from St Pancras station, London, and the Tyne High Level Bridge, Newcastle, to war memorials, places of worship, public parks, earthworks and historic high streets.
- 4.8 There is an increasing recognition that heritage is not a barrier to sustainable growth, but a key driver, evidenced in the testimony of owners, developers and professional advisers in *Constructive Conservation: Sustainable Growth for Historic Places* (EH, 2013), and demonstrated in recent persuasive research such as *New Ideas Need Old Buildings* (HLF, 2013). This is also reflected in exemplary projects such as the new University of the Arts at Kings Cross in London, a regeneration scheme of former railway land and structures which brought 10 buildings back into use, including listed former granaries, and generated 20 new businesses, 26,000 new jobs and 8,000 sq m of new public realm.
- 4.9 The expansion of the Heritage at Risk programme in 2009 to include a wider range of assets. Since then, 978 scheduled monuments, 143 conservation areas and 13 registered parks and gardens have been conserved and removed from the Heritage at Risk Register. Its predecessor – the Buildings at Risk Register – has helped focus efforts since 1999 on securing a future for 848 buildings and structures (60% of the total on the baseline Register).
- 4.10 The establishment of the Alliance to Reduce Crime Against Heritage (ARCH) which now has over 200 members. ARCH has built powerful links between heritage organisations, the police and local communities and provided tailored training and support to tackle wilful damage to valued historic assets. To date 20 local areas have become signatories to a memorandum of understanding to prevent and enforce heritage crime offences.
- 4.11 A greater acceptance of the need to understand significance as the basis for planning for the future, as evidenced in the growth in the use of Conservation Plans. At a larger scale, by 2007 all 17 of England's World Heritage Sites had Management Plans, and in 2014, Natural England produced National Character Area Profiles across England which identify historic character and significance at landscape scale.
- 4.12 Securing some heritage protection reforms, for example, in the Enterprise and Regulatory Reform Act, providing greater clarity and certainty for those managing historic assets, and in the Marine and Coastal Access Act, where changes to marine licensing placed an increased emphasis on conserving the maritime historic environment.

Main priorities for sector collaboration over the next five years

- 4.13 The following themes are identified as priorities for *collaborative action* by the historic environment sector, working together through the Historic Environment Forum:
- 4.14 **Ensuring systems of heritage protection are the best that can be devised with the resources available.** They should recognise the relevance of the historic environment to society, maximise the use of historic assets, and minimise factors which place heritage at risk.
- 4.15 **Preventing and tackling heritage at risk through expertise and funding;** specifically:
- addressing loss and damage to heritage assets as a result of decay, neglect, lack of maintenance, lack of use, criminal activity, and the impacts of a changing climate
 - finding new funding solutions to repair heritage assets (including philanthropy, Growth Deal, Community Infrastructure Levy)
 - continuing to campaign for fiscal reform, notably over the differential of VAT on repair, maintenance and alteration compared with new build to encourage the better care and re-use of older properties
- 4.16 **Contributing positively to the growth agenda by:**
- developing and promoting joint guidance and best practice on heritage and sustainable growth
 - joining up partners' advice, guidance and policy within the planning system, particularly on major infrastructure developments and initiatives such as Enterprise Zones
 - fostering innovation in the sustainable use of our uniquely rich historic environment asset base
- 4.17 **Supporting landscape-scale management by:**
- informing policies and investment proposals to deliver heritage conservation at a landscape scale, for example, through including the conservation of historic assets as one of a range of environmental benefits in programmes such as the EU Regional Development Fund, New Environmental Land Management Scheme and HLF Landscape Partnerships
 - minimising/preventing the impacts on historic assets of changing land management practices and environmental policy changes
- 4.18 **Resilience to social and economic forces for change,** such as the growth in online retailing and changes in patterns of worship, the changing face of the high street and increased leisure time.
- 4.19 **Climate change resilience and energy efficiency** to ensure the physical impacts of climate change adaptation and mitigation on historic assets are managed in a way which respects significance and reflects best practice. This includes:
- responding to the Energy Act and the Green Deal and their implications for historic buildings

- providing advice and guidance to help owners manage physical change of historic assets in relation to climate change impacts (such as flooding) or mitigation (such as energy efficiency measures)
- developing a sector philosophy on the management of coastal erosion.

5 Public Engagement

- 5.1 Everyone in England is entitled to define, engage with, and make decisions about the historic environment and how it is cared for.
- 5.2 The historic environment is the physical expression of our collective history; each one of us, as individuals and as part of wider communities, has our own perspective on this shared past and managing it is a collective responsibility. Much of the depth and richness of our historic environment rests in the wide range of people involved in its creation, development, care or loss. The views and actions of national 'communities of interest' as well as communities based on place add an essential dimension to the value of our historic buildings, places, landscapes, archaeology, objects and townscapes. Yet, we know, too, that there are significant segments of our society who do not engage with the historic environment.
- 5.3 Our aim is to ensure that as many people and as wide a range of people as possible are engaged with the many aspects of the historic environment. Community involvement is about participation, responsibility and a greater sense of 'ownership'. The more people that take part in activities and share the day-to-day responsibilities for the care of our historic environment, the more representative we become as a sector and the more certain we can be that when change occurs, it has broad public support.
- 5.4 We know that the lives of people who actively engage with their historic environment can be enriched; the historic environment can form an important part of personal identity and sense of place. Through involvement in heritage activity people report enhanced wellbeing, skills and connectedness. Moreover, they have a vested interest in seeing the things they value protected and they can play an important role working with owners and organisations to ensure that the necessary systems of management and protection deliver clear public benefit.
- 5.5 The historic environment sector in England has a good track record in public engagement, and by international comparisons is highly successful, but there is much more that can and should be done to broaden and deepen participation. We know from the DCMS *Taking Part* survey that nearly three quarters of all adults have visited at least one heritage site in the past year and from a range of other sources that significant numbers of primary school children and volunteers engage with heritage. We have a solid base to work from but we need to find new ways to enthuse a wider range of individuals, groups and communities to participate in the historic environment and, increasingly to take a lead in its management. We need to encourage more dialogue and shared understanding between the varied interest groups in our communities and encourage people to take more direct action in caring for their historic environment. We must inspire teachers and community leaders to

see the potential of the historic environment on their doorsteps for learning, skills development, and improved wellbeing.

Key achievements over the last decade

- 5.6 Starting from a sound base, the last decade has seen a wider range of people get involved with and champion their historic environment. The popularity of heritage-focused TV programmes and the importance ascribed to heritage in tourism research and quality of life surveys demonstrate the profile of the historic environment in the public consciousness. A 2013 study for the Ecclesiastical Insurance Group showed that over two-thirds of UK adults believe heritage sites are important to the local community.
- 5.7 In addition, UK citizens have the 4th highest participation rates in Europe for visiting cultural heritage sites. Visits to Heritage Open Days, the largest annual heritage volunteer initiative, have trebled since 2002 with more than two million visits recorded last year. Around half of these visitors came from lower socio-economic groups, and 50% visited Heritage Open Day venues for the first time. This year saw a record three million visitors attend Heritage Open Days.
- 5.8 Research findings commissioned for the Historic Environment Forum and The Heritage Alliance and work by English Heritage and the Heritage Lottery Fund have given the sector a much stronger understanding of levels of engagement and the barriers different groups of people face in participating.
- 5.9 Nevertheless, strides have been made in encouraging a wider range of groups and individuals to get involved. Membership of organisations responsible for looking after the historic environment has increased significantly. These organisations play a part in drawing in an even wider public beyond their membership through events, newsletters, campaigns and other activities.
- 5.10 The *Taking Part* survey has demonstrated that a focus on more effective public engagement has helped widen participation, with those groups often most excluded (for example, people with a disability) gradually gaining more opportunities to learn about the historic environment. There is still a significant gap in rates of participation and increased efforts are needed to engage directly with under-represented groups and the community organisations that they work with.
- 5.11 Education is central to the public engagement agenda. Research tells us that school-age children are more likely to enjoy heritage as adults if they have been introduced to it at an early age, both in and out of school. Initiatives such as the Heritage Schools programme, funded by the Department of Education, work by the National Trust, the Historic Houses Association and the Heritage Alliance and projects funded by the Heritage Lottery Fund are helping teachers and those working in the historic environment sector to provide high quality cultural education for more children and their families. There is more work to be done to embed the historic environment in local curricula and to up-skill teachers to exploit the potential of their local heritage across all curriculum subjects. In addition, every young person should be able to

experience the historic environment beyond the classroom as an essential part of their learning and development, regardless of ability or circumstances.

- 5.12 The increasing use of digital media allows the historic environment sector to reach a greater number of individuals and organisations more easily than in the past. The success of the Images of England campaign demonstrates what can be achieved. There is potential across the sector for a step-change in public engagement using digital tools, but heritage organisations need to embrace new technologies and achieve a greater understanding of the opportunities they provide.

Main priorities for sector collaboration over the next five years

- 5.13 The following five themes are identified as priorities for *collaborative action* by the historic environment sector, working together through the Historic Environment Forum:

- increasing overall levels of participation - numbers of volunteers, visitors and heritage organisation members, with a particular emphasis on increasing diversity through effective strategies to engage under-represented groups.
- giving individuals and communities the tools and encouragement to better understand, investigate, manage, enjoy, make decisions about and raise funds for the historic environment around them.
- championing high quality heritage learning experiences for children and young people within and outside the classroom, supporting the delivery of the school curriculum and the wider Cultural Education agenda.
- developing improved communication and alliances within and beyond the historic environment sector so that the benefits people experience from engaging with the historic environment are understood, resourced and delivered in a wider strategic context.
- supporting, sustaining and developing programmes and strategies which promote people's entitlement to connect with their historic environment.

6 Capacity building

- 6.1 Understanding, conserving, explaining and championing our heritage depends on having the right people with the right skills in our communities and access to relevant infrastructure, knowledge and data, facilities, tools and equipment (both traditional and modern). The heritage sector needs to invest in its human capital today if it wants to achieve its objectives tomorrow and be able to adapt effectively to changes in the economy, environment and society. The historic environment makes a major contribution to the economy and supports hundreds of thousands of jobs in England. It has a strong and complementary relationship with the UK's creative economy and tourism offer and is vital for future growth. If this contribution is to continue, we need to grasp the opportunity offered by current government policy to make sure that further and higher education provides the skilled workforce heritage employers need. These efforts need to be part of the mainstream: not an add-on.

- 6.2 The survival and appeal of our historic environment also depends on a vigorous infrastructure of proactive, reliable and resilient organisations being able to access the human and financial resources they need to achieve their ambitions. A healthy independent heritage movement is essential. Strengthening and building capacity will be central to achieving those aims.
- 6.3 Our approach to capacity building needs to enhance the ability of people to get involved with heritage interests and the decisions that affect them. We need to give them the competencies to take a greater level of responsibility. We can do this by developing their confidence, and their practical, business planning and management skills, as well as their ability to diversify their income streams. Equally we need to sustain capacity and enhance the knowledge of decision-makers and the expertise of heritage practitioners to ensure they can meet the current and future needs of communities, owners and developers.
- 6.4 Private owners and independent organisations own significant holdings of heritage assets. They are its custodians on behalf of society and they keep the historic environment viable for future generations. We need to ensure that they are supported by effective professional advice.

Key achievements over the last decade

- 6.5 The sector has had a long term commitment to building capacity, most notably through supporting local authorities to build essential front-line services providing advice within the planning system. Despite the need for greater capacity to meet the needs for conservation and archaeology front line services, and sector enthusiasm for these services, there has instead been a decline since 2006 which has alarmed owners, the professions and other stakeholders. It is clear that new approaches are going to be needed to ensure that decisions taken about heritage assets are based on independent, skilled professional advice.
- 6.6 Capacity building effort intensified following the publication of 'Power of Place' in 2000 and the last decade has seen a greater emphasis on structures for cross-sector working, through the creation of the Historic Environment Forum and The Heritage Alliance and the launch of the National Heritage Protection Plan in 2010; on professional and craft training, through initiatives such as Historic Environment Local Management (HELM), development of accreditation schemes for professionals and English Heritage's and HLF's funding for skills, most recently through the Skills for the Future programme; and on community empowerment through Heritage Lottery Fund initiatives such as Catalyst (2012).
- 6.7 *Heritage Counts* and the *Heritage at Risk Register* demonstrate that the condition of heritage in England is slowly improving but continually remark on skills shortages and gaps. Entry to skills has diversified for example, the take-up of non-academic specialist heritage qualifications such as the NVQ in archaeological practice is encouraging, but could be promoted more widely to open up new routes into the profession, to meet market demand, and to validate the impressive skills contributed by many in the voluntary sector.

- 6.8 Apprenticeships and vocational learning opportunities are needed to replace an aging craft workforce and to address the lack of investment in heritage training experienced a generation ago. There is further need for the sector to engage with Apprenticeship reform, take part in new employer-led initiatives and be in a position to draw down more investment from mainstream funding, such as the Skills Funding Agency. There is more scope to create new qualifications, generate new partnerships with training providers and awarding bodies, and to build the capacity of the current workforce to assess and accredit work-based learning.

Main priorities for sector collaboration over the next five years

- 6.9 The following themes are identified as key priorities for *collaborative action* by the sector, working together through the Historic Environment Forum:
- 6.10 **A sustainable model for LPA conservation and archaeology services**
The expertise provided by local authority conservation and archaeology staff is central to the successful discharge by LPAs of their statutory duties to the historic environment. It is at the heart of good decision-making by the LPAs and, in unlocking schemes and managing change, is valued by developers, owners and their agents. This capacity and these benefits are now at risk because of cuts on local government spending. These pressures were the foremost concern amongst respondents to the consultation on the National Heritage Protection Plan and have recently been identified as an area of concern by the Heritage Minister. The sector needs to work together with owners, developers, government, national agencies, funding bodies, local government and professional institutes to seek new and more sustainable ways of resourcing the expertise needed to ensure LPAs can continue to deliver their statutory duties and the discretionary heritage services that are a priority for the communities they serve.
- 6.11 **Better support for the independent heritage sector**
As government funding for 'paid' local heritage services gets smaller, the 'ask' on the independent heritage sector is growing. Individuals, communities and third sector organisations need good and accessible frameworks of advice and training. Better training in professional and crafts-based skills will be important, but thought needs to be given to incentivising potential volunteers to maximise capacity. Further work is needed to coordinate a strategy for the sector that identifies under-utilised skills, marries them to demand, fills skills gaps where needed and targets skills and training resources in the most efficient manner.
- 6.12 **A more integrated and focussed approach to education, training and continuing development of heritage professionals**
The Farrell Review points out that 80% of the building stock we will have in 2050 has already been built, so conversion and improvement of existing building is a major part of the construction industry – a fact not fully reflected in many built environment courses (at all levels). There are significant gaps in knowledge and expertise in relation to conservation principles, approaches and good practice, and there is a particularly acute shortage of skilled practitioners who can adequately assess the environmental

performance of historic buildings. This is a major issue that must be addressed. Similarly, good training for heritage professionals and generalists who work in the sector is fundamental to the delivery of high quality advice and skills. All built environment professional bodies have a particular responsibility to survey and analyse the training needs of their members and take steps to ensure they are met. The higher education sector, work-based learning and continuing professional development can all play a significant part in improving the current situation, requiring greater cooperation between and within the education sector, employers, construction industry/small business organisations, training boards and professional bodies.

6.13 Increasing the uptake of training and qualifications among the skilled and semi-skilled working in the sector

A skilled and qualified workforce of craftspeople and other operatives is essential to ensure the appropriate conservation, repair and maintenance of heritage assets and to realise the full contribution of heritage to employment and growth. Research in the construction sector has identified critical skills gaps and shortages which put our built heritage at risk and highlights the scale of the challenge. 87% of surveyed contractors do not hold formal qualifications relating to traditional buildings and 75% of contractors have not undertaken any traditional building training in the past 4–5 years. Only 26% of contractors consider it likely they will recruit an apprentice or trainee in the next 5 years.

6.14 Creating demand

The Historic Environment Forum has begun an initiative to encourage the specification of accredited professionals as well as nurturing a larger proportion of 'intelligent clients'. Starting with research, and with a view to guidance and advocacy products, this work is being taken forward by relevant professional, specialist craft and client bodies.

6.15 Meeting these challenges will require co-ordinated action to ensure that there is well-targeted and incentivised client demand for a skilled and qualified workforce, that there is an increase in the take up of training and qualifications and that we ensure that the appropriate training opportunities and qualifications are available.

7 Helping things to happen

7.1 In 2013 the heritage sector marked the centenary of the 1913 Ancient Monuments Amendment and Consolidation Act, a landmark piece of legislation which recognised heritage as a public good, and introduced compulsory 'Preservation Orders', the 'Scheduling' of ancient monuments and stronger government powers to take into guardianship historic assets of outstanding importance.

7.2 Over the past century a great deal more has been achieved. Heritage protection has matured into a system where designation, planning and enforcement are intended to work in concert to protect historic significance, while encouraging positive adaptation and change. Heritage is valued, visited and volunteered at, better researched and better understood. The historic environment is also in a mixed economy of ownership, from private to public, offering a measure of resilience in its day-to-day care.

- 7.3 At the heart of all these changes there have always been dedicated groups of owners and advocates seeking constant improvement in the way that the historic environment is valued and protected. Many of these positive outcomes were the result of wider societal changes in the twentieth century: with visitor growth linked to a rise in affluence and an increase in leisure time, mass car ownership and low cost motoring, and increased understanding emerging from the rapid expansion of higher education and Arts and Humanities research in particular. An evolving interpretation of the role of the State has also played its part, with pension provision permitting retirement to volunteer roles, and heritage protection boosted by a significant growth in legislation and public spending.
- 7.4 In the twenty-first century we cannot necessarily continue to rely on the building blocks of the past. Public sector spending has been significantly squeezed, affecting everything from public ownership, to statutory and non-statutory heritage protection provision, to funding for higher education and research. Household incomes for the majority have stagnated relative to the cost of housing, energy and transportation. People are working longer hours and later in life. And while the UK economy may be improving, this is likely to bring its own challenges, rising development pressure chief amongst them.
- 7.5 It is in this evolving context that the historic environment sector must rise to new realities and continue to ensure that the right conditions are in place for our heritage to thrive long into the future. The activities set out in the previous four chapters of Heritage 2020 are all practical steps designed to do just that, but they are not enough on their own.
- 7.6 As Government activity contracts and public spending pressures increase, we need to understand, communicate and demonstrate the contribution of heritage across a much broader spectrum of policy priorities. Beyond measuring some 'instrumental' values, such as contribution to the economy, there is currently not enough thorough research to evidence the ways in which people benefit from the historic environment, or from an understanding of heritage or history. A better understanding of 'value' would help the sector to raise the profile of heritage and champion its contribution to society more effectively. More importantly, it would encourage owners, policy makers and commercial interests to maximise those benefits, and ensure the right frameworks are in place for doing so.
- 7.7 There are some things, like regulation, that only Government can do, and others, like planning decisions, which we expect to be the purview of democratically elected representatives. Where this is the case, we should seek to hold local and central Government accountable for their responsibilities, and expect them to resource activities appropriately. To achieve this, the sector may require better evidence to demonstrate the impact on the historic environment when these responsibilities are not met. At the same time, as the scale of Government decreases, the challenge is to help policy makers focus on changes that can empower the sector to help itself, rather than relying on Government to meet every need.

- 7.8 The sector should look beyond Government in other ways, for example in seeking to identify a broader base of support. The pool of potential donors and funders, large and small, must be increased and although heritage sector organisations have made good progress in this area, there is considerable potential for development, particularly around more innovative community forms of funding like Community Interest Companies.
- 7.9 Engaging more effectively with owners is another area of priority. In general, the sector could work more collaboratively, form new relationships and make new alliances. We need to make more of an effort to understand the drivers of others, and suggest how heritage can help meet their needs.
- 7.10 Finally, it is important to create broader understanding of how priorities and activities of others, impact on heritage. We will help policy makers to recognise and understand the interdependencies and support the development of the right strategic, legislative and policy frameworks.

Key achievements over the last decade

- 7.11 The heritage sector has become more plural and connected, and more effective. Links with other sectors such as the natural environment, community activism, police, crime agencies and business are achieving wider social benefits than just heritage alone (e.g. tackling anti-social behaviour through heritage crime initiatives). The development of deeper partnerships, e.g. through the *History Matters* campaign and *Heritage Open Days* initiative demonstrates the power of what can be achieved through joint working across the heritage sector. The growth of The Heritage Alliance is another example of increasing cooperation and demonstrating positive impacts. The work of the heritage sector on joint initiatives such as *Heritage Counts*, the annual audit of the state of heritage which was begun in 2002, the heritage parts of the *National Planning Policy Framework* and its supporting guidance demonstrates that the sector can work together to good effect. Equally, there are other areas, such as VAT reform where there has been little progress despite concerted and co-ordinated action by the whole sector.
- 7.12 More people engage with heritage than ten years ago and general advocacy and awareness of heritage is likely to have played a very significant part in that shift. The heritage sector has been active in seeking to improve the processes of managing heritage, through simplified and more flexible regulation and through placing a much greater emphasis on encouraging positive management rather than simply protection through regulation alone.
- 7.13 The sector has become better at informal co-operation to create the maximum possible impact with limited budgets, e.g. The Archaeology Forum, The Joint Committee of National Amenity Societies, by working together to address VAT inequalities. It has also become better at and more comfortable in attracting private capital and philanthropy to enable conservation work to take place and more experienced in balancing public and private benefits.

- 7.14 The heritage sector has made some progress with the use of digital media, especially in relation to the promotion of campaigns for saving individual buildings. But there remains real potential to unlock use of digital media to encourage participation, support campaigns and effect practical conservation.
- 7.15 The last decade has seen the sector commissioning and publishing a much more robust evidence base making the case, particularly through initiatives of the Historic Environment Forum including *Heritage Counts*. A key element in this is the co-ordinating roles of the Historic Environment Forum and The Heritage Alliance who have played key roles in sharing information and, where appropriate, presenting unified views on key topics of concern to the sector.

Main priorities for sector collaboration over the next five years

- 7.16 The heritage sector began, and has always remained effective at drawing in, voluntary help and donations to support its work. In times of reduced public spending, efforts to expand this popular backing should increase. Alongside this, the sector must also put forward to government the compelling case that support for heritage is not a subsidy but an investment that can make a contribution across many policy priorities, from tourism income and other forms of sustainable growth to education, health and community well-being.
- 7.17 The following themes are identified as priorities for *collaborative action* by the heritage sector, working together through the Historic Environment Forum:
- to better understand, (through collaborative research and evaluation activities), and reinforce, the evidence base, demonstrating the social and economic value of heritage to society
 - encouraging Government to work closely with the sector in producing a new cross-departmental policy statement on the positive contribution the historic environment makes to sustainable growth and well-being in England, matching those in Scotland and Wales
 - engaging more effectively beyond the sector with all those who affect the historic environment in the course of their activities, to raise awareness of that impact, and find collective means of managing it in the most positive way.
 - working with central and local Government to ensure the right frameworks and resources are in place to deliver what only Government can do, and to help the sector help itself and others.
 - supporting heritage groups in developing the tools (especially digital ones) that will help them to engage more broadly and become more powerful and effective advocates.
 - engaging with organisations, communities and others who have not until now shown an interest in heritage and encouraging them to become advocates for those parts of the heritage that they particularly value.
 - promoting a higher level of philanthropic giving to heritage projects and organisations.

GETTING INVOLVED

- 8.1 Organisations and individuals can get involved in the Heritage 2020 framework in a number of important ways:

Influencing priorities for action

- 8.2 The first is by influencing the identification and definition of the strategic priorities identified by the Heritage 2020 framework. These priorities will evolve and change over the five year life of the framework. There will be a regular annual review to ensure that the priorities continue to be relevant and up-to-date. Ideas and suggestions are welcome from across the heritage sector, from local communities and from owners and managers of heritage assets, from researchers and campaigners. Anyone with an interest in the historic environment of England can make a suggestion as part of the yearly consultation, or at any time via an email postbox (see below).

Contributing to a working group

- 8.3 The delivery of actions to address the strategic priorities identified within the framework will be overseen by working groups, one of each of the five themes. The working groups will meet periodically throughout the year and will review the priorities and progress of actions and collaborations designed to address the priorities. If you or your organisation has a significant role to play in addressing one or more of the priorities and you have time to commit, then contact the team delivering the framework (see contact details below). The Working Group Chair will contact you to discuss how you might be able to contribute (bearing in mind that the groups will need to be kept to a manageable size).

Helping to deliver the priorities

- 8.4 The Heritage 2020 framework sets out strategic priorities for the historic environment sector across England. To achieve the ambitions of the framework requires action by individuals and organisations, often working in collaboration to add value to individual efforts. A key value of the framework is that it shows how the sector is working together to shared aims, and this can be clearly demonstrated by organisations individually showing how they are contributing to the collective effort.
- 8.5 Any organisation can produce a statement, either as a standalone document or integrated with existing organisational mission statements or strategic objectives, which articulates how they link with the priorities of the Heritage 2020 framework.
- 8.6 Where statements are published online to make them more widely accessible it will be possible to link to them from the Heritage 2020 web site in order to share objectives. It is hoped that the results of relevant actions from across the sector will contribute to an annual report of progress which will be published.

Reporting success

- 8.7 From local groups to major organisations, the effort applied to delivering the strategic priorities identified within the Heritage 2020 framework should be noticed and celebrated. Whether a local research or engagement programme, or a major partnership initiative, if it fits with the Heritage 2020 priorities then the Historic Environment Forum will be happy to consider it for inclusion in the regular published progress reports. Send in your reports, ideally with one or two high resolution photographs, for an annual deadline of the end of June each year.

Contacting the delivery team

- 8.8 You can contact the team working on the delivery of the framework, including the working groups, via an email postbox at Heritage2020@theheritagealliance.org.uk, or via post to Heritage 2020, c/o The Heritage Alliance, Clutha House, 10 Storeys Gate, Westminster, London SW1P 3AY.

NEXT STEPS

- 9.1 The new framework will take over from the existing National Heritage Protection Plan from 1 April 2015.
- 9.2 It will be overseen on behalf of a range of organisations working across the historic environment sector in England by the Historic Environment Forum. A sub-committee of the Forum will lead the delivery of the framework and bring together the efforts of the working groups that support each theme.
- 9.3 An annual report will be prepared on collective progress which links in with the strategic priorities defined in the framework. This will be published in the autumn of each year as part of the annual *Heritage Counts* publication (www.heritagecounts.org.uk) which is also overseen by the Historic Environment Forum.
- 9.4 Linked with the publication of the annual progress report there will be an annual consultation on the Heritage 2020 framework and the evolving strategic priorities which will be formally reviewed each year.
- 9.5 It is anticipated that the priorities will evolve year by year within the existing themes, and that a major review of the definition of the themes and the structure of the framework will be undertaken before a new Heritage 2025 framework is published in draft for consultation in 2019, prior to its introduction in April 2020.

20 November 2014