



· INSTITUTE · OF · HISTORIC ·
BUILDING · CONSERVATION

HOW TO CARE FOR PLACES AND PEOPLE:
*Towards a common standard in Historic Environment Conservation
Services & Skills*

A CONSULTATION DOCUMENT FROM THE IHBC

CONSULTATION DRAFT

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INTRODUCTION

Executive summary

This document is a desk-top collation by the IHBC's director, Dr Seán O'Reilly, using recent research and empirical studies into standards in conservation skills and services. The table of skills and services under consultation has been developed from a body of work undertaken by professional interests across the historic environment and conservation sectors. Skills and services are classified into three parts which correspond to the main activities in historic environment conservation as defined in the IHBC's membership assessment criteria: Evaluation, Management and Intervention.

Different versions and drafts have been the subject of limited consultation inside and outside the IHBC. However the document remains a working draft at present.

Key resources for the definition of activities include work carried out by Dr Stuart Eydmann and Dr Carol Swanson for Scotland, Nicholas Johnson for Cornwall and by John Preston, the Chair of the IHBC's Education, Training and Standards Committee, much of which is carried on the IHBC's website. This work has been supplemented by wider consultation across the IHBC's committees.

The IHBC is seeking comments on all aspects of the document.

Application

The document is intended to help inform the definition of standards of both an individual's skills in historic environment conservation and the services that should be expected from historic environment conservation bodies in local and, as appropriate, national government.

The classification of activities originates in both the IHBC's membership criteria, the Areas of Competence and their corresponding competences, together with the activities of historic environment services.

Continuity between the standards appropriate to both skills and services is to be expected. The IHBC's competences represent the fundamental skills set for a conservation professional. Informed by national and international standards, they have been developed out of the skills sets required by conservation professionals, and in particular by Conservation Officers working in local planning authorities. As such these standards represent a microcosm of the services that should be available through the local authority if it is to fulfil its statutory duties and civic obligations to historic environment conservation.

Context

The Areas of Competence and the corresponding competences represent the standard for the assessment of skills, knowledge, experience and understanding that the IHBC requires of historic environment conservation professionals (see www.ihbc.org.uk). Demonstration of an appropriate standard within the Areas of Competence confirms an individual's capacity to operate within the holistic framework and inter-disciplinary environment demanded in historic environment management and conservation. As such, they constitute the criteria for full professional membership of the IHBC.

The Areas of Competence, and the corresponding competences, are summarised as follows:

AREA OF COMPETENCE	PROFESSIONAL	PRACTICAL: EVALUATION	PRACTICAL: MANAGEMENT	PRACTICAL: INTERVENTION
COMPETENCES	PHILOSOPHY	HISTORY	LEGISLATION & POLICY	DESIGN & PRESENTATION
	PRACTICE	RESEARCH, RECORDING & ANALYSIS	FINANCE & ECONOMICS	TECHNOLOGY

The IHBC's Areas of Practical Competence can map to wider policy and management processes, further integrating the skills and the service. For example the three Areas of Practical Competence can be mapped to the generic skills that have been identified by Sir John Egan as underpinning the creation of sustainable communities – (see <http://www.communities.gov.uk/publications/communities/eganreview>). Similarly these can also fit with generic management outcomes for local authorities, outcomes that should be applicable across the UK, as the table indicates:

	SUSTAINABLE COMMUNITIES		
IHBC PRACTICAL COMPETENCES & CONSERVATION CYCLE	EVALUATION (HISTORY; RESEARCH, RECORDING & ANALYSIS)	MANAGEMENT (LEGISLATION & POLICY; FINANCE & ECONOMICS)	INTERVENTION (TECHNOLOGY; DESIGN & PRESENTATION)
EGAN'S COMPONENTS OF SUSTAINABLE COMMUNITIES	SOCIAL & CULTURAL GOVERNANCE (INFORMED) ENVIRONMENTAL (REGARD FOR FUTURE)	GOVERNANCE SERVICES ENVIRONMENTAL	ECONOMY HOUSING & BUILT ENV. TRANSPORT AND CONNECTIVITY
MODEL POLICY-BASED OUTCOMES/ CONSTITUENTS	SOCIAL, CULTURAL & EDUCATIONAL	SUSTAINABLE DEVELOPMENT & ENVIRONMENTAL AWARENESS	ECONOMY AND ENHANCED QUALITY OF LIFE

This document uses the first and last of these models as a starting point in structuring the description of standards of skills and services.

England and UK Context

This document is intended to have applications across the UK. There is, however, a necessary and appropriate focus on reform of conservation operations in England and Wales, generically referred to as Heritage Protection Reform (HPR). Allied to this is the relevance of the current discussion to changes in local government proposed in England.

The wider changes shaping HPR include:

- the need for more effective integration of systems (legislative and otherwise) used in the conservation of the historic environment, in particular links to the planning system
- increased transparency in the management processes
- enhanced inclusion and the promotion of community interests, opportunities and responsibilities
- wider benefits shaping historic environment conservation, not envisaged in

- original conservation legislation, including:
 - environmental benefits, including biodiversity, carbon reduction
 - community benefits, including quality of life and social capital
 - cultural benefits, including wider appreciation of what might be valued for conservation
 - extending conservation processes to encompass a more widely defined historic environment
 - the need to be consistent with accepted conservation philosophies and principles as well as with current practice.

Though in legislative terms HPR will impact most significantly on conservation operations in England, the institute recognises that the issues that HPR looks to address reflect wider social, cultural and economic changes across the UK. As such, the issues raised here are entirely relevant to our membership in its entirety, and to conservation across the UK.

While aspects of this document respond to initiatives such as HPR, the primary intention is to create a standard that can be applied across the UK.

UK compliance

There are significant differences between the conservation and planning operations across the devolved and regional administrations. As yet, these have been only provisionally addressed in the current document. A key purpose of the consultation is to develop applicability across the UK.

Cautionary notes

This document is necessarily the product of a number of individual and collective interests and strengths. It does not yet provide a definitive statement of the skills or services or approaches to their development. Achieving such a definition is one of the objects of the consultation.

In addition the document does not reflect entirely the skills sets relevant to an applicant seeking full membership of the IHBC. In particular it does not encompass skills sets that can lie outside the areas of expertise or service typical of a planning authority service, such as in archaeology and architecture.

Comments & responses

The IHBC is seeking comments on:

1. The overall contents and structure of the document
2. Corrections, variations and alterations to the detailed statements
3. Compliance with local, regional and national practices and terminology
4. Suggestions for further development and elaboration
5. Any other observations considered relevant to this initiative, including
 - should we have a column identifying the indicative policy framework (absent currently as it appears to vary extensively across the nations)

Responses can be sent to the IHBC's dedicated e-mail address skillsconsultation@ihbc.org.uk, or to the institute's director, Dr Seán O'Reilly, at director@ihbc.org.uk. **The consultation closes on 2 May 2008**

Explanatory Notes on the Table Headings:

The table headings are used to introduce a range of issues that relate to the definition of skills and service as follows:

HEADING	EXPLANATION	CONTEXT
Ref No:	A key for future reference	To be completed
Historic Environment	The action the professional	The objective of the

Conservation Action or Activity:	should be able to undertake or the service provide	consultation is to define skills and standards through activities.
IHBC competences (Primary)	The model skills set forming the membership criteria – the competences - of the IHBC. The criteria overlap with the activities, so only the main competences are identified. The professional competences defined by 'Professional' and 'Practical' competences must underpin all skills, and are not identified separately.	The current document will help inform and define the skills sets for historic environment conservation professionals more effectively
Typical Lead Dept/ (HPR)	The part of the local authority service most likely to lead in the provision of the service (with the likely lead department under HPR identified if that is different)	Identifying the lead department provides an indicative occupational framework for the skills sets sought
Typical Lead Officer: (Historic Environment Conservation (HEC) Officer)	As above, for the individual	As above, for the individual
Stat. Duty (varies by nation & case law)	An indication of the extent to which the activity is a statutory responsibility of the authority (which will vary by devolved administration and by the interpretation of caselaw)	Statutory duties define a fundamental corporate objective for local authorities, and clarify the definition of roles and duties
New/ varied duty under HPR/ PWP (estimated)	An estimation of the potential impact on the service that HPR as represented by forthcoming legislation, following the Planning White Paper in England and Wales, might bring	An evaluation of potential impact on services in local authorities arising from changing legislation in heritage protection in England, that is, Heritage Protection Reform. A central theme is the delegation of duties to local planning authorities so that they can effectively manage their local historic environment ('Local Delivery'). This column considers where local authority responsibilities to conservation might be different – in scale OR area – under such delegation. In particular, it assesses where the professional obligation of the service to conservation may require additional capacity if an acceptable standard of service is to be provided.

AREA 1	<u>IHBC AREA OF PRACTICAL COMPETENCE: EVALUATION</u> <u>MODEL OUTCOMES: SOCIAL, CULTURAL & EDUCATIONAL</u>	<u>The service:</u> Guide to and interpreter of the local Historic Environment as a cultural resource <u>Overarching Performance assessment:</u> Delivering sustainable communities that enjoy valued places, and manage them effectively through being fully informed about their cultural values <u>Sample assessment criteria:</u> Involvement in cultural activities; HER usage; Inclusion; Heritage days; peer review; volunteering etc				
REF. NO.	HISTORIC ENVIRONMENT CONSERVATION ACTION OR ACTIVITY	IHBC COMPETENCES (PRIMARY)	TYPICAL LEAD DEPT/ (HPR)	TYPICAL LEAD OFFICER: (inc. Historic Environment Conservation (HEC) Officer)	STAT. DUTY (VARIES BY NATION & CASE LAW)	NEW/ VARIED DUTY UNDER HPR/ PWP (est.)
1.1	Provide Historic Environment information to national heritage agencies for designation and advise accordingly	All; Research, Recording, Analysis (RRA); History	Planning; [Museums ?]	HEC officer; SMR/HER officer	N [?]	Yes
1.2	Maintain copies of the statutory and descriptive lists for local consultation	RRA	Planning	HEC officer; SMR/HER officer	Yes?	No
1.3	Maintain the Sites and Monuments Record (SMR)/ Historic Environment Record (HER) (including built environment, terrestrial and Marine and managing local lists as well as information on undesignated assets etc)	History; RRA; Legislation & Policy	Planning	HER officer; Planning and GIS support staff	No	Yes
	Develop, maintain and promote local lists	History; RRA;	Planning	HEC Officer	Yes	Yes
	Prepare and maintain GIS information (on the planning system or SMR/HER)	Practice; RRA	Planning	HEC officer; SMR/HER officer; Planning and GIS support staff	?	Yes (varied by 'Local Delivery')

	Maintain a register of and monitor all heritage assets in council guardianship	History; RRA; Technology	Planning; Property	HEC officer; SMR/HER officer; Planning and GIS support staff	?	No
	Maintain an Assets at Risk Register, (Buildings at Risk (BAR), etc) including surveys and Field Warden duties	History; RRA; Technology	Planning	HEC Officer, and support (BAR staff) [service level agreements]; Archaeology services	No	Yes (varied by Local Delivery)
	Maintain statistics and other generic management data in relation to the historic environment, including landscape/ seascape characterisation	History; RRA;	Planning	HEC officer; Planning and support staff (re 1990 act, Part II, Ch 1, S 11 (The local planning authority— (a) shall keep under review the matters which may be expected to affect the development of their area or the planning of its development; and (b) may, if they think fit, institute a survey or surveys of their area or any part of their area for examining those matters)	?	Yes (varied by Local Delivery)
	Provide (guide to) information for local history and local studies including photographic collections? Promotion	History; RRA;	Museums, Libraries	HEC Officer; SMR/HER Officer; Librarian, curator	No	Yes (varied by Local Delivery)

	Contribute to the management of archives and records (artefact and documentary) including key files relating to listed buildings, listed building consents etc... [& Support information??]	History; RRA;	Archives, Libraries	Archivist; curator; librarian; SMR/HER Officer; HEC Officer	No	Yes (varied by Local Delivery); move to planning responsibility for operating records in context of SMR/HER
	Prepare and/or contribute to research frameworks/ agendas or equivalent	History; RRA;	Museums [Planning?]	HEC Officer; SMR/HER Officer Support staff; SLAs	No	Yes (varied by Local Delivery)
	Publish local guidance on the conservation of prehistoric and historic environments	All	Planning	HEC Officer	No	Yes (varied by Local Delivery)
	Work with national organisations charged with the promotion and conservation of the historic environment e.g. National Amenity Societies; Professional bodies; heritage agencies and property owning and developing trusts	All	Planning	HEC officer	No	Yes (varied by Local Delivery)
	Undertake outreach/publicity on the historic environment through lectures, talks exhibitions etc.	All; History; RRA	Planning, Cultural Services	HEC officer, HER Officer; heritage officer; Museum officer	No	Yes (varied by Local Delivery)
	Run local Heritage Open Days and equivalent	All; Finance & Economics	Planning, Libraries, Museums	HEC officer; museums officer/ librarian etc	No	No
	Prepare/contribute to council Cultural Strategy or equivalent	All; Legislation & Policy; Finance & Economics	Varies	Museums, libraries, archives, HEC officer, archaeologist	?	No
	Liaise with museums service (including the collection, recording and preservation of artefacts)	History; RRA	Museums/ planning	HEC officer; Museums/ SMR/HER officer	?	Yes (varied by Local Delivery)

	Manage and interpret heritage sites and attractions	History; RRA; Finance and Economics; Design & Presentation	Planning, Museums, Property	HEC officer; Museums officer, curators, rangers	No	No
	Author, contribute to, edit, fund and publish local guides on the historic environment.	History; RRA;	Planning, Libraries	HEC Officer [?local history officer]	No	Yes (varied by Local Delivery)
	Act as point of contact for the public for local HE information	History; RRA;	Planning, Museums, shared service, special arrangement	HEC Officer; SMR/HER / Museum/ Education Officer; Culture officer	No (?)	Yes (varied by Local Delivery)
	Specify, or provide advice, on non-rescued building investigations e.g. for evaluation and interpretation purposes	History; RRA; Technology	Planning, Museums, shared service, special arrangement	HEC Officer	No	Yes (varied by Local Delivery)
	Specify, or provide advice, on site excavations e.g. for evaluation and interpretation purposes	History; RRA; Technology				
	Foster voluntary HE work	All	Planning, Museums, shared service/ special arrangement	HEC Officer; SMR/HER / Museum Officer	No	Yes (Local delivery)

	Provide or take part in education on the historic environment	History; Practice; Professional	Planning; Education, Museums, Culture Services	Education officer, teachers, community education, rangers, museums, libraries, HE officer	No	Yes (Local delivery)
	Administer and contribute to national and local HE award schemes	All	Planning	Planning officer, HEC officer	No	Yes (varied by Local Delivery)
	Advise Planning and wider LA services on potential of built environment for designation	History; RRA;	Planning	HEC Officer	No (?)	Yes (varied by Local Delivery)
	Investigate and record – or oversee - historic assets (buildings & archaeology)	History; RRA; Technology		HEC Officer/ Archaeology Officer	No/Part	Yes (varied by Local Delivery)

AREA 2	<u>IHBC AREA OF PRACTICAL COMPETENCE: MANAGEMENT</u> <u>MODEL OUTCOMES: SUSTAINABLE DEVELOPMENT & ENVIRONMENTAL AWARENESS</u>	<p>The service: The HE leader, professionally skilled and locally informed, providing advocacy and advice on the management of the HE inside the planning system, in liaison with local communities, elected members and HE and Design Champions, and implementing a statutory duty of 'special regard for preserving' HE assets</p> <p>Overarching Performance Assessment: Delivering sustainable communities by securing sustainable development, creating strong, safe and inclusive communities with valued places benefiting current and future generations</p> <p>Sample Assessment Criteria: Low carbon emission developments (through sustainable development); inclusion of communities in planning and change; skilled jobs (locally delivered skills and training through HLF etc, as well as employment through business); peer review; BAR-related figures; Consultations (inclusive) on assessments/plans/schemes etc; published guidance etc; consents etc; designations etc; skills and training programmes etc;</p>				
REF. NO.	HISTORIC ENVIRONMENT CONSERVATION ACTION OR ACTIVITY	IHBC COMPETENCES (PRIMARY)	TYPICAL LEAD DEPT./ (HPR)	TYPICAL LEAD OFFICER: (inc. Historic Environment Conservation (HEC) Officer)	STAT. DUTY (VARIES BY NATION & CASE LAW)	NEW/ VARIED DUTY UNDER HPR/ PWP (est.)
2.1	Liaise across the local public service as informed HE leader, adviser and promoter	All	Planning	HEC Officer	No	Yes (varied by Local Delivery)
	Advise and guide planning (and related) committees and key LA representatives (including Champions) on HE and related design issues	All	Planning	HEC Officer	No/ Part	Yes (varied by Local Delivery)
	Monitor, maintain and support standards across the service, including liaison with quality assurance processes (prof. bodies; CPD etc)	All; Professional	Planning	Planning/ HEC Officer	No	Yes (varied by Local Delivery)
	Contribute to, prepare and implement Development Plans (or chapter authoring), or their equivalent, including policies relating to the historic environment	Legislation & Policy; Finance & Economics	Planning	Planning officer/ HEC Officer	Yes	

	Prepare Supplementary Planning Guidance	Legislation & Policy; Finance & Economics	Planning / HE (?)	HEC Officer; landscape architect	No	Yes (varied by Local Delivery)
	Undertake, commission, assess or require Strategic Environmental Assessments of plans	Legislation & Policy; Finance & Economics	Planning	HEC Officer	Yes	Yes (varied by Local Delivery)
	Prepare, maintain and implement local Heritage Strategy [or equivalent?]	Legislation & Policy; Finance & Economics	Planning	HEC Officer	No	No
	Prepare Community Plan and form Community Planning partnerships or equivalent	Legislation & Policy; Finance & Economics	Chief Executive	Planning officer, HEC Officer; heritage/museum officer	No/?	Yes (varied by Local Delivery)
	Prepare local HE guidance for developers	Legislation & Policy; Finance & Economics	Planning	HEC Officer; support staff	No	Yes (varied by Local Delivery)
	Prepare state of the historic environment reports	RRA; Legislation & Policy; Finance & Economics	Planning	HEC Officer	No	Yes (varied by Local Delivery)
	Advise National Heritage Agencies on designation	RRA; Legislation & Policy; Finance & Economics	Planning	HEC Officer; HER Officer	Yes/?	Yes (varied by Local Delivery)
	Identify, designate and review conservation areas, including consultation, inclusion of Article 4s etc	History; RRA;	Planning	HEC Officer; HER Officer	Yes	Yes (varied by Local Delivery) (Possible reduction)
	Undertake conservation area appraisals and deliver conservation area strategies	All; RRA; Legislation & Policy; Finance & Economics	Planning	HEC officer; consultants	Yes	Yes (varied by Local Delivery) (depends Article 4s)

	Prepare, consult and implement Article 4 Directions covering development in Conservation Areas [and local listing?]	Legislation & Policy;	Planning, Legal	HEC officer, legal officer	Yes?	Yes (varied by Local Delivery) (depends Article 4s)
	Liaise with local/regional development agencies (or equivalent) in promotion of HE re heritage-led regeneration	All; Legislation & Policy; Finance & Economics Design and Presentation; Technology	Planning	HEC Officer	No	Yes (varied by Local Delivery)
	Advise on agri-related impacts on landscapes, including cultivation (Class 1 consents)	Legislation & Policy; Finance & Economics	Archaeology/ Museums (Planning)	HEC Officer/ Archaeology Officer	No?	Yes
	Take part in policy liaison on matters to do with the Historic Environment e.g. IHBC, ALGAO, national heritage agencies	All; Legislation & Policy; Finance & Economics	Planning; [Museums, shared service/ special arrangement (service level agreement)]	HEC Officer	No	Yes (varied by Local Delivery)
	Advise on alterations to designated assets and conservation areas	Legislation & Policy; Finance & Economics; Design and Presentation;	Planning	Planning officer, HEC Officer	No	Yes (varied by Local Delivery)
	Establish, manage and contribute to local amenity and heritage forums	All	Planning	Planning officer, HEC Officer		Yes (varied by Local Delivery)

	Advise (esp. pre-application) on development impacts on HE	Legislation & Policy; Finance & Economics; Design and Presentation;	Planning	HEC Officer	No	Yes (varied by Local Delivery)
	Process applications for consent, conservation area (or equivalent planning) consent and for works in conservation areas	Legislation & Policy; Finance & Economics; Design and Presentation;	Planning	Planning officer [trained?], HEC Officer [input]	Yes	Yes (varied by Local Delivery)
	Process Planning Applications with impact upon the Historic Environment	All; Legislation & Policy; Finance & Economics; Design and Presentation;	Planning	Planning officer, HEC Officer [input]	Yes	Yes (includes CA Consent)
	Participate in local public inquiries	All; Legislation & Policy; Finance & Economics; Design and Presentation;	Planning	Planning officer; HEC Officer	No	Yes (role of EH to reduce)
	Serve Building Preservation Notices/ repairs notices (or equivalent) as required	Legislation & Policy; Finance & Economics; Technology	Planning; Legal	HEC Officer	Yes?	?
	Promote and serve Compulsory Purchase Orders (or equivalent) as required	Legislation & Policy; Finance & Economics; Technology	Planning; Legal	HEC Officer	?	No
	Monitor the implementation of approved alterations to listed buildings and conservation areas	Legislation & Policy; Finance & Economics; Design and Presentation; Technology	Planning	Planning officer, monitoring officer, enforcement officer, HEC Officer	No	Yes (varied by Local Delivery)

	Take enforcement action in the case of unauthorised works to designated assets and conservation areas	Legislation & Policy; Finance & Economics; Design and Presentation; Technology	Planning	Planning Officer, monitoring Officer, enforcement officer, HEC Officer; Archaeology Officer, council solicitor	Yes	Yes (varied by Local Delivery)
	Prepare briefs for new development affecting the historic environment, [including development outside the planning system]	Legislation & Policy; Finance & Economics; Design and Presentation; Technology	Planning	Planning Officer, HEC Officer; [consultants]	No	Yes (varied by Local Delivery)
	Promote, seek and administer external funding for the historic environment e.g. ERDF, Heritage Lottery Fund	Legislation & Policy; Finance & Economics;	Chief Executive, Planning	HEC officer, funding officer, Lottery / Education officer etc	No	Yes (varied by Local Delivery)
	Investigate and record sites and buildings to be affected by proposals	All; History; RRA; Legislation & Policy; Finance & Economics	Planning (including HERs); [National recording agencies]	HEC Officer, consultant, contractor oversight	No	Yes (varied by Local Delivery)
	Monitor, advise, process and instruct works to trees in conservation areas	All	Planning, Parks	Tree officer, HEC Officer	No?	Yes (varied by Local Delivery)
	Recommend and progress Tree Preservation Orders (often of historic significance)	All	Planning, Parks	Tree officer, HEC Officer	No	No

	Specify developer funded contract investigative work and monitor professional standards in contract HE investigation (archaeology?)	Legislation & Policy; Finance & Economics; Design and Presentation; Technology	Planning, Museums? shared service, special arrangement	HEC Officer/ Archaeology Officer	No	Yes (varied by Local Delivery)
	Advise on wider cultural assets, including battlefields, designed landscapes, cultural symbols, parks, cemeteries etc	All	Planning, Museums, shared service, special arrangement; [National agencies]	HEC Officer/ Archaeology Officer	No	Yes (varied by Local Delivery)
	Provide audits for agri-environment scheme applications under a national agreement	History; RRA; Finance and Economics	Planning, Museums, shared service, special arrangement	HEC Officer/ Archaeology Officer	No	Yes (varied by Local Delivery)
	Provide HE and archaeological advice to the Forestry Commission and equivalent	History; RRA	Planning, Museums, shared service, special arrangement	HEC Officer/ Archaeology Officer	No	No

	Provide HE advice and oversight to [statutory undertakers??] and equivalent	All	Planning, [Museums ?, shared service, special arrangement]	HEC Officer	No	?
	Monitor condition of un-designated HE assets	All; Technology	Planning; shared service, special arrangement	HEC Officer/ Archaeology Officer	No	Yes (varied by Local Delivery)
	Work with other partners to encourage the inscription of World Heritage Sites and work on the management of inscribed sites.	All	Planning	HEC Officer/ Archaeology Officer	No	No
	Liaison with major HE property and asset owners in area e.g. national property trusts	All	Planning, Museums	HEC Officer	No	Yes (varied by Local Delivery) (includes exploration of HPAs)
	Assess impact of Core Path Network [or equivalent?] on heritage assets	All	Planning	HEC Officer/ Archaeology Officer, access officer	No	No
	Contribute to local tourism forums including production and implementation of tourism strategy	All	Planning	Tourism officer, HEC Officer/ Archaeology Officer	No	Yes (varied by Local Delivery)
	Contribute to local biodiversity (?) audits or equivalent	All	Planning	HEC Officer biodiversity officer	No	No

	Act as point of contact for national heritage agencies and interests	All	Planning	HEC Officer/ Archaeology Officer Museums officer		Yes (varied by Local Delivery)
	Advise on Certificates of Immunity (or equivalent) where applicable	All; History Legislation & Policy; Finance & Economics;	Planning	HEC Officer; Planning Officer;	No	Yes
	Advise on Exemptions (Ecclesiastical etc)	All; History Legislation & Policy; Finance & Economics;	Planning	HEC Officer;	No?	No
	Advise on Marine Asset Consent, where applicable	All	Planning/?	[HEC Officer/ Archaeology Officer]	No/?	Yes
	Negotiate, oversee implement and review management agreements or equivalent (including HPAs)	All	Planning;	HEC Officer/ Archaeology Officer/ Consultant/ National and Local Amenity interests (NGOs?)	No	Yes
	Report on service to corporate management (annual reports/assessment procedures etc)	All	Planning	HEC Officer	?	Yes (varied by Local Delivery)

AREA 3	<u>IHBC AREA OF PRACTICAL COMPETENCE: INTERVENTION</u> <u>MODEL OUTCOMES: SOCIAL, CULTURAL & EDUCATIONAL</u>	<p><u>The service:</u> The Historic Environment improver and enhancer, professionally skilled and locally informed, pro-actively promoting the enhancement, improvement and creation of valued places, working on delivery with private and public sector developments interests, local communities and representatives to secure the highest standards</p> <p><u>Overarching Performance assessment:</u> Delivering sustainable communities with valued places secured for future generations (conserved, maintained, enhanced and inclusive)</p> <p><u>Sample assessment criteria:</u> Inward investment in heritage-led projects (including Conservation Areas); Investment in maintained public buildings; Contribution to development of ; Public realm works; regeneration masterplans; design briefs; Enforcement notices; UD briefs etc; Investment in preservation trusts/market failure; quality of life indicators;</p>				
REF. NO.	HISTORIC ENVIRONMENT CONSERVATION ACTION OR ACTIVITY	IHBC COMPETENCES (PRIMARY)	TYPICAL LEAD DEPT/ (HPR)	TYPICAL LEAD OFFICER: (inc. Historic Environment Conservation (HEC) Officer)	STAT. DUTY (VARIES BY NATION & CASE LAW)	NEW/ VARIED DUTY UNDER HPR/ PWP (est.)
3.1	Bring forward schemes to conserve, enhance and improve conservation areas and comparable places	All; Legislation & Policy; Finance & Economics; Design and Presentation; Technology	Planning	HEC officer, highways engineer	Yes	Yes (varied by Local Delivery) (possibly by simplification)
	Initiate and project manage projects for the conservation of individual sites and buildings	All; Legislation & Policy; Finance & Economics; Design and Presentation; Technology	Planning; Property	HEC officer, architect, dedicated project manager	No	Yes (varied by Local Delivery)

	Develop, fund, fundraise, promote and implement partnership regeneration schemes, including with local and regional development agencies, private sector etc	All; Legislation & Policy; Finance & Economics; Design and Presentation; Technology	Planning	Planning officer, HEC officer	No	Yes (varied by Local Delivery)
	Advise on relevant design aspects of proposals for new development and development initiatives with impacts on historic or sensitive areas, including urban design issues	All; Legislation & Policy; Finance & Economics; Design and Presentation; Technology	Planning	Planning Officer HEC officer	No	Yes (varied by Local Delivery)
	Advise on planning (land use, etc) architectural and other physical aspects of changes in the built environment that impact on the historic built environment	All; Legislation & Policy; Finance & Economics; Design and Presentation; Technology	Planning	Planning Officer HEC officer	No	Yes (varied by Local Delivery)
	Prepare, administer and fund as appropriate conservation led regeneration schemes and projects including Townscape Heritage Initiatives, CAPS, HERs, PSCA etc	All; Legislation & Policy; Finance & Economics; Design and Presentation; Technology	Planning	HEC officer, dedicated project officer, consultant	No	No
	Promote, develop and contribute to urban regeneration initiatives	All;	Planning	HEC officer; Project manager	No	Yes (varied by Local Delivery)
	Advise, promote and contribute to Regional/City Conservation Trusts or equivalent	All	Planning	HEC Officer; Dedicated project officer	No	Yes (varied by Local Delivery)

	Advise on the maintenance and repair of listed buildings and buildings in conservation areas	All; Legislation & Policy; Finance & Economics; Design and Presentation; Technology	Planning	HEC officer	No	Yes (varied by Local Delivery)
	Provide advice to owners and others on the management of undesignated properties	All; Legislation & Policy; Finance & Economics; Design and Presentation; Technology	Planning; Museums, shared service, special arrangement	HEC Officer	No	Yes (varied by Local Delivery)
	Administer grants for the repair of listed buildings, conservation areas and other heritage assets	Legislation & Policy; Finance & Economics;	Planning	HEC officer	No	Yes (varied by Local Delivery)
	Maintain historic bridges and viaducts	All; Legislation & Policy; Finance & Economics; Design and Presentation; Technology	Planning, Highways	Highways engineer; HEC Officer	No	Yes (varied by Local Delivery)
	Maintain built heritage assets in council guardianship and advising on property management issues as needed	All	Property, owning departments	Property officer, service heads, HEC officer	No	No
	Develop and agree management guidelines for local authority historic assets, including the production (or manage the production by consultants) of conservation statements and conservation plans for local authority assets,	All	Property, owning departments	Property officer, service heads, HEC Officer	No	Yes (varied by Local Delivery)

	Advise on the disposal of heritage assets within council guardianship e.g. redundant school buildings or affected land	All; Legislation & Policy; Finance & Economics;	Property	Property officer, planning officer, advice from HEC officer	No	No
	Establish, manage and/or work with local building preservation or conservation trusts	All; Legislation & Policy; Finance & Economics;	Planning	HEC officer, dedicated officer	No	Yes (varied by Local Delivery)
	Take pro-active (project-based) action over buildings/monuments/assets at risk in the council area, including preparation of response/action strategies, business and community liaison, market intervention and marketing strategies and the promotion of management, business and financial resources appropriate to market needs.	All	Planning	Building Control, HEC officer, building control officer, council solicitor, enforcement officer	?	Yes (varied by Local Delivery)
	Identify, liaise with and maintain lists of local conservation contractors and craft workers	Legislation & Policy; Finance & Economics; Technology	Planning; Museums	HEC officer, museums officer	No	Yes (varied by Local Delivery)
	Advise on the building and adaptation of public buildings [under new legislation] e.g. schools and halls to new uses or to meet DDA, and smoking restrictions	All; Legislation & Policy; Finance & Economics; Design and Presentation; Technology	Property	Property/ Estates officer; architects; HEC officer,	No?	Yes (varied by Local Delivery)
	Contribute to management and enhancement of the public realm in general, including as appropriate undertaking urban design and related placemaking activities and public realm works, including those with historic environment interests, including on the maintenance and replacement of street surfaces and furniture	All	Highways, Planning	Highways engineer, planning officer; input from HE Officer	No	Yes (varied by Local Delivery)

	Administer architectural salvage store	All	Planning	HEC officer	No	No
	Provide professional training via seminars, CPD, student placements etc	All; Finance and Economics; Technology	Planning, Museums, shared service, special arrangement	HEC officer, Museum Officer	No	Yes (varied by Local Delivery)

CONSULTATION DRAFT