



IHBC GUIDANCE NOTES

Design sources for historic building conservation

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This is one of a series of occasional Guidance Notes published by The Institute of Historic Building Conservation (IHBC). IHBC Guidance Notes offer current and recent guidance into topics that we consider crucial to the promotion of good built and historic environment conservation policy and practice. The Notes necessarily reflect knowledge and practice at the time they were developed, while the IHBC always welcomes new case examples, feedback and comment to research@ihbc.org.uk for future revisions and updates.

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Introduction

1. 'Design' is a very broad concept. It applies to the conception of all manner of man-made objects and products. In relation to a building, design considerations include its arrangement on the plot, its form, the arrangement of internal spaces, its structural integrity, construction materials, means of heating and cooling, mechanical and electrical fittings, down to such details as ironmongery and other fittings. In relation to a town, design considerations include broader issues such as urban form, spatial arrangements, movement, use, scale, massing and impact on townscape and local character. In relation to the design of external space, landscape architecture has further considerations covering hard surfaces, plants and water. Highway design can have an enormous impact on the design of external space and the settings of historic buildings. Building conservation can involve consideration of yet further design considerations, such as internal decorative schemes. The contemporary imperative for design to be sustainable design requires consideration of such matters as thermal efficiency, solar gain and embodied energy. Conservation requires adaptations to historic buildings to improve building performance to be carried out in ways that avoid or minimise harm to heritage significance.

2. Design is one of the eight competencies required for full membership of the IHBC. Satisfying this competence does not require members to be fully competent in all aspects of the design of buildings, landscapes or towns, or to hold separate qualifications in architecture, landscape architecture, town planning, urban design, structural engineering or interior design. However, it is essential to be fully conversant with key relevant design concepts and issues in order to be able to show competence in design for historic building conservation

purposes and to be able to contribute positively to the formulation and consideration of development proposals that impact on the historic built environment.

3. This IHBC Toolbox Guidance Note seeks to provide guidance and information sources on design concepts and issues in relation to the IHBC Design/Presentation competence.

IHBC design competence

4. 'Design/Presentation' is one of the eight IHBC competences. The current descriptor for the competence is:

Ability to analyse and evaluate quality of design, existing and proposed, of buildings and areas, and to present the results of such analysis in a way accessible to both professional and lay audiences.

To have a detailed appreciation of the principles of character, townscape and urban design and to be able to undertake analysis accordingly.

To be able to communicate design concepts by means of sketching, conventional drawing techniques and/or CAD.

To be able to promote high standards of design of individual buildings or areas by:

- drawing up and implementing schemes
- preparing design guidance/briefs.

To be able to prepare schemes of enhancement works including streetworks and landscaping.

The associated IHBC technology competence requires the ability to be able to give advice on appropriate methods for the repair and maintenance of historic buildings, including advising on specialist repair techniques. Repairs that cannot be carried out on a 'like-for-like' basis have to be designed. Consequently, there is a degree of overlap between the design competence and the technology competence.

There is also a fundamental overlap between the design competence and the philosophy competence.

Design considerations

5. Design considerations that arise in relation to historic building conservation work fall into the following categories:

- Alterations/adaptations to historic buildings to satisfy the requirements of current or new users, to accommodate a change of use, or to satisfy modern standards (including retrofit to improve thermal performance and energy consumption).
- Repairs to historic buildings and structures that cannot be carried out on a 'like-for-like' basis.
- Extensions to historic buildings to provide additional accommodation.
- New buildings and structures that impact on the settings of historic buildings and structures.
- Alteration of existing buildings and structures that impact on the settings of historic buildings and structures.
- Hard and soft landscaping schemes that impact on the settings of historic buildings and structures or on historic parks and gardens.
- New buildings or alteration of existing buildings, large-scale developments or landscaping schemes that impact on historic places, including historic towns (or historic parts of towns), historic villages, and historic parks and gardens.

Developing competence in design for IHBC membership

6. Most, although not all, accredited conservation courses include some design content. However, this may not be sufficient to satisfy the IHBC design competence. Potential members that have not completed taught courses with design content will need to pay particular attention to developing proficiency in design. Becoming skilled in design for historic building conservation purposes necessitates cultivating sensitivity. This takes time and involves an iterative process based on experience of development proposals that impact on the historic environment. The source list below is intended to provide a basis for developing design skills for historic building conservation. It is intended to assist both prospective members to develop design skills and equally, to assist existing members in refining their design competence. The list of sources is not intended to be exhaustive.

7. A particular characteristic of the IHBC design competence is an understanding of the integration of heritage considerations with place-making. Good design always starts with site analysis and an understanding of the wider context. Understanding the character of the surrounding area and townscape qualities is a fundamental requirement for successful place-making. In satisfying the design competence, it is important to appreciate that design is a process that moves from broad concept to fine detail. It is equally important to appreciate that the design process is a creative rather than a mechanical one and also that the process should involve consultation with the local community and neighbours.

8. A useful way of developing design sensitivity is by case studies and the analysis of completed developments, to determine their strengths and weaknesses in relation to impact on heritage significance. Examples should be drawn from far and wide – much can be learned from international cases, where more liberal control regimes may apply. Sources that provide good examples of design in a historic context, or even contentious examples, are considered particularly valuable. The integration of Durham University's Dunelm building into its highly sensitive historic context (completed in 1966 and listed in 2021) would be a good example. A recent contentious case was the development at 5 Clerkenwell Close, Islington which won a Royal Institute of British Architects' award but was subject to enforcement action by the local council. The former English Heritage *Building in Context Toolkit* provides useful case studies.

9. Design and Access Statements submitted in support of planning applications give the designer the opportunity to explain the rationale of the submitted scheme and, if other designs have been considered, why the final scheme was adopted. Reading the better examples can help inculcate an understanding of design matters but it should be noted that many submitted design statements fail to take advantage of the opportunity offered and offer little as an educational resource. Similarly, involvement with Design Review Panels and Conservation Area Advisory Committees can help develop design skills.

10. Design award schemes, both national and local, provide further opportunities to study design and develop sensitivity with regard to design for historic building conservation. Award winners will not always be sensitive to their historic context but publicised awards usually give summaries of why the judges reached their decision and these are open to critique. Visits to award winning schemes can be particularly useful.

Urban Design and design for conservation

11. An understanding of urban design principles is essential for conservation practitioners. The application of urban design principles is invariably critical in securing appropriate development in conservation areas and in the settings of listed buildings. However, design considerations for historic building conservation go further than urban design and require attention to a greater degree of detail, especially in relation to historic building alterations. Such matters as use of appropriate materials, construction details, internal works, joinery details and colours can be critical in securing appropriate work to historic buildings.

Green design issues

12. Ensuring that new buildings are designed in a sustainable manner and that existing buildings are suitably adapted to improve their thermal performance are considerations that frequently overlap with built heritage conservation. The

majority of building design work carried out in recent years relates to alteration and extension of existing buildings rather than wholly new constructions and design for the re-use of existing buildings is likely to become increasingly important. However, sustainable design is not limited to individual building design and retrofit. Historic towns can form the basis of sustainable mixed use settlements that maximise sustainable forms of travel and minimise private car use. Therefore broader urban design and landscape design issues are part of sustainable design. Green design competence is not a separate IHBC competence – it should be seen as a component part of the IHBC design competence for conservation work. It also relies on adequate technical understanding and therefore overlaps with the IHBC technology competence.

Design Guides

13. The publication of the first edition of the seminal *Essex Design Guide* in 1973 stimulated many similar local guides in many parts of the UK, and they continue to be used in many areas. The better design guides applied with sensitivity have undoubtedly helped raise local design standards, and in particular have helped promote local distinctiveness. A particular strength of the original *Essex Design Guide* was that, in addition to providing design guidance appropriate in Essex, it set out fundamental principles of special arrangement that are applicable everywhere. Other notable early examples of design guides produced in the 1970s were the *Cheshire Design Guide*, the *North Norfolk Design Guide*, and the *Peak Park Design Guide*.

14. Unfortunately, not all design guides have been produced to such a high standard. Some are superficial and simplistic, sometimes relying on tick and cross examples of what is considered to be good and bad design in a dogmatic manner. Conversely some guides are overly detailed and too prescriptive. Those wishing to develop design knowledge and skills for conservation purposes will find the better examples to be informative but design guides need to be treated with some caution. Equally, those utilising design guides in their practice need to apply them with sensitivity – design guides should set out recommended approaches but should not be used as rule-books to be imposed in a dogmatic manner.

Design Codes

15. The Government is currently giving particular emphasis to design codes and it is currently proposed to amend planning law and policy so that development that complies with a design code is deemed to be acceptable. Most design codes incorporate urban design principles which may not be sufficient to secure appropriate development in the historic environment. It is currently unclear how the Government intends to secure appropriate control over development that

impacts on the historic environment. An understanding of the nature of design codes and their application is clearly going to be increasingly important in conservation practice.

Stylistic considerations

16. There has been a long history of disagreement about architectural style. Unfortunately, assessment of the appropriateness of proposed designs sometimes focuses on the issue of style. A striking modern design that contrasts harshly with the traditional character of its context can generate fierce local opposition. Equally, architects can be frustrated by the insistence of some local planning authorities on traditional designs in historic places. The examples provided in English Heritage's 2001 publication *Building in Context* show that either approach can be appropriate and that it is the quality of the design assessed in relation to fundamental design considerations that matters, not the stylistic approach. Successful modern designs sometimes blend modernism with traditional elements.

17. It is important to appreciate that architectural design is not just about external appearance and detailing. Assessment of the suitability of any design should have regard to the full range of design considerations. Furthermore, in assessing the appropriateness of any design, it is essential to understand the principles behind the design and to appreciate, in relation to adaptation of existing buildings, that it is often essential to reconcile practical needs with conservation in order to secure long term survival. Debates about the suitability of a design proposal that affects the historic environment should rarely be dominated by stylistic considerations.

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Design Sources

Historic publications that have shaped design-thinking in relation to historic building conservation:

- Trystan A Edwards, *A. Good and Bad Manners in Architecture*, J. Tiranti, London, 1946
- Kevin Lynch, *The Image of the City*, The MIT Press, Massachusetts, 1960
- Jane Jacobs, *The Death and Life of Great American Cities*, Penguin Books, Harmondsworth, 1961
- Gordon Cullen, *Townscape*, The Architectural Press London, 1961. Re-published as *Concise Townscape*, Architectural Press, Oxford, 1971
- Department of the Environment, *Quality in Town and Country: A Discussion Document* (Introduction by John Gummer), 1944
- James Strike, *Architecture in Conservation: Managing Development at Historic Sites*, Routledge, London, 1994

- Peter J Larkham, *Conservation and the City*, Routledge, London, 1996

Publications that focus on the re-use, alteration and extension of historic buildings:

- Derek Latham, *Creative Re-use of Buildings, Volume 1: Principles and Practice, Volume 2: Selected Examples*, Donhead, Shaftesbury, 2000
- Michael Stratton, *Industrial Buildings: Conservation and Regeneration*, Spon, London, 2000
- David Kincaid, *Adapting Buildings for Changing Uses: Guidelines for Change of Use Refurbishment*, Spon, London, 2002
- RIBA architecture.com, *Design Matters: Conservation, Modernisation & Adaptation of Existing Buildings* (PDF) (no date)
- Roger Hunt, Iain Boyd, *New Design for Old Buildings*, RIBA in association with the Society for the Protection of Ancient Buildings, London, 2017 (2019, updated 2020)
- Historic Environment Scotland, *Managing Change in the Historic Environment: Use and Adaption of Listed Buildings*
<https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=8ab1f9c9-521a-435e-a3f2-aa240119b5e1>

Publications that focus on new buildings in historic places:

- English Heritage / Commission for Architecture and the Built Environment CABE, *Building in Context: New development in historic areas*, (pamphlet/PDF), 2001
<https://www.designcouncil.org.uk/sites/default/files/asset/document/building-in-context-new-development-in-historic-areas.pdf>
- English Heritage, Commission for Architecture and the Built Environment (CABE), and Kent Architecture Centre, *Building in Context Toolkit: New Development in Historic Areas*, London, English Heritage / CABE, 2007
<http://www.building-in-context.org/>
- Sebastian Loew, *Modern Architecture in Historic Cities: Policy, Planning, and Building in Contemporary France*, Routledge, London, 1998
- John Warren, John Worthington, Sue Taylor (Eds.) *Context: New buildings in historic settings*, Architectural Press, Oxford, 1998
- Michael Davies, *Design in the historic environment*, The Building Conservation Directory, 2003
- Chris Smith, *The Old and New*, Special issue, Conservation Bulletin No.59, English Heritage, 2008
- Historic Scotland, Architecture + Design Scotland, and the Scottish Government, *New Design in Historic Settings*, Edinburgh: Historic Scotland, 2011

- Susan Macdonald, *Contemporary architecture in historic urban environments*, Conservation Perspectives, the GCI Newsletter 26 (2), 13-15, 2011
- Kenneth Williamson, *Development and Design of Heritage Sensitive Sites: Strategies for Listed Buildings and Conservation Areas*, Routledge, London, 2010
- English Heritage, *Valuing Places: Good Practice in Conservation Areas*, HELM Guides, English Heritage, London, 2011
- Historic England, Historic Environment Good Practice Advice in Planning Note 3 (Second Edition), *The Setting of Heritage Assets*, 2017

Urban Design:

- Oscar Newman, *Defensible Space, Crime Prevention Through Urban Design*, Macmillan, 1972
- Ian Bentley, Ian et al (1985) *Responsive Environments: A manual for designers*, Oxford, Architectural Press, 1985
- Jan Gehl, *Life Between Buildings: Using Public Space*, (transl. by Koch, J), Van Nostrand Reinhold, New York, 1987
- Department of the Environment, Transport and the Regions and the Commission for Architecture and the Built Environment, *By Design – Urban design in the planning system: towards better practice*, HMSO, 2000
- Homes and Communities Agency, *Urban Design Compendium 1: Urban Design Principles*, Llewelyn-Davies, London, 2000
- Homes and Communities Agency, *Urban Design Compendium 2: Delivering Quality Places*, Llewelyn-Davies, London, 2013
- The Scottish Government, *Creating Places: A policy statement on architecture and place for Scotland*, 2013
<https://www.gov.scot/publications/creating-places-policy-statement-architecture-place-scotland/documents/>
- Urban Design London, *The Design Companion for Planning and Placemaking*, RIBA Publishing, London, 2017
- Rob Cowan, *Essential Urban Design: A Handbook for Architects, Designers and Planners*, RIBA Publishing, London, 2021

Publications that cover relevant architectural principles:

- Francis D K Ching, *Architecture: Form, Space and Order*, New York: Van Nostrand Reinhold, New York, 1996
- Prizeman (Ed), *Sustainable Building Conservation: Theory and Practice of Responsive Design in the Heritage Environment*, RIBA Publishing, London, 2015
- Simon Unwin, *Analysing Architecture*, Second Edition London: Routledge, London, 2003

Design Guides:

- The examples of design guides listed below are a representative sample. The list is not intended to be comprehensive and there will undoubtedly be other examples of well-produced and useful design guides.
- Essex County Council / the Essex Planning Officers' Association, *The Essex Design Guide*, First, Second and Third Editions and The Essex Design Guide website, 1976, 1997, 2005, 2018
<https://www.essexdesignguide.co.uk>
- North Norfolk District Council, North Norfolk Design Guide – Supplementary Planning Document, (2008, emerging replacement published for consultation)
<https://www.north-norfolk.gov.uk/tasks/planning-policy/design-guide/>
- Wealden District Council, Wealden Design Guide – Supplementary Planning Document, 2008
<https://www.wealden.gov.uk/planning-and-building-control/planning-policy/planning-policy-documents/wealden-design-guide/>
- Scottish Borders Council, *Placemaking and Design*, 2010
https://www.scotborders.gov.uk/downloads/file/930/placemaking_and_design
- High Weald Joint Advisory Committee, *High Weald Housing Design Guide*
- Lincolnshire County Council, *Streetscape Design Manual*, 2016, 2019
<https://www.lincolnshire.gov.uk/downloads/file/1950/streetscape-design-manual-pdf>
- The Scottish Government, *Designing Streets Toolkit: guidance and templates*, 2016
<https://www.gov.scot/publications/designing-streets-toolkit/>
- Ministry of Housing, Communities and Local Government, *National Design Guide: Planning practice guidance for beautiful, enduring and successful places*, 2019

Design Codes:

- Ministry of Housing, Communities & Local Government, *National Model Design Code: Part 1 The Coding Process*, June 2021
- Ministry of Housing, Communities & Local Government, *National Model Design Code: Part 2 Guidance Notes*, June 2021

Design in development plans:

- National Trust / Dave Chetwyn, *Guide to Heritage in Neighbourhood Plans: Annex 1: Design and character tool*, 2019