

Guidance on conservation area appraisals

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INTRODUCTION

*'Conservation area appraisals, like conservation plans, depend upon an understanding of the area which draws upon techniques of conservation - based research and analysis. Conservation area appraisals could also, like conservation plans, include a more specific assessment of significance and some analysis of how that significance is vulnerable as the basis for defining policies for preserving or enhancing their character.'*¹

Just as conservation area designation should not be seen as an end in itself, neither should the preparation of a conservation area appraisal. Rather, it should be regarded as the first step in a dynamic process, the aim of which is to preserve and enhance the character and appearance of the designated area - and to provide a basis for making sustainable decisions about its future through the development of management proposals. Ideally, an appraisal should be prepared prior to designation; but, for many existing conservation areas, this will not have been done. Undertaking (or commissioning) an appraisal therefore offers an opportunity to re-assess the designated area and to evaluate and record its special interest. Involving the local community in that process is essential.

About the guidance

This guidance offers advice to those undertaking, or commissioning, conservation area appraisals. It complements and should be read in conjunction with the companion English Heritage's publication ***Guidance on the management of conservation areas***², which describes the legislative and planning policy framework and deals with most aspects of conservation area designation, control, and enhancement.

The key government guidance on all development affecting historic buildings, conservation areas and sites of archaeological interest remain Planning Policy Guidance Note 15 (PPG15) *Planning and the historic environment* (1994), and Planning Policy Guidance Note 16 (PPG16) *Archaeology and planning* (1990), until these are rewritten as a new Planning Policy Statement (PPS). The legislation to which this guidance primarily refers is the Town and Country Planning Act 1990 ('the principal Act') and the Planning (Listed Buildings and Conservation Areas) Act 1990 ('the Act').

Government reform of the planning system inevitably will have an impact on the way in which the heritage is dealt with. Our approach to understanding and managing historic areas needs to be kept under review and adapted as the wider planning context evolves. ***This guidance is therefore being issued as a consultative document.*** It is intended to review it within the next two years and feedback to the English Heritage Policy Team on its scope, practicability and usefulness would be welcomed.

¹ *Informed Conservation*, section 6.10, Kate Clarke, English Heritage, 2001

² English Heritage, 2005 – available on the HELM website: www.helm.org.uk

The local development framework

The government has introduced a new kind of planning system in which the focus is on flexibility. Local authorities now produce *local development frameworks* (LDFs), which consist of *development plan documents* (DPDs), which form part of the statutory development plan; *supplementary planning documents* (SPDs), which expand policies set out in a DPD; and the local authority's *statement of community involvement* (SCI). *Area action plans* (AAPs), which focus on short-term implementation, can be used within the LDF to provide the planning framework for areas where significant change or conservation is needed. All local development documents must be subject to sustainability appraisal (SA), incorporating the requirements of the Strategic Environmental Assessment Directive (SEA) and need to be included in the local authority's *local development scheme* (LDS).

Details of the relationship between conservation area management and the LDF system can be found in section 1 of *Guidance on the management of conservation areas*, pages 5-7.

CONTEXT

The right approach

Every area has a distinctive character, derived from its topography, historic development, current uses, and features such as streets, hedges, archaeological monuments, buildings and place names. Understanding and appreciating an area's character, including its social and economic background and the way in which such factors have shaped the urban fabric, should be the starting point for making decisions about both its management and its future.

In a large, complex and/or multi-period conservation area, the character may vary considerably within the boundary. For example, a small market town may have a medieval core, focused on a market place or church, then a Georgian phase of development of grander houses and formal streets, followed by the arrival of the railway and Victorian residential development, and eventually by modern housing at the edges and on gap sites.

Where the character of an area is composite in this way and the phases of growth are clear, it will often be worth analysing the character areas or phasing separately, looking at, for example:

- current and past land use
- social and economic background
- orientation
- archaeological and historic sites
- geological and topographical mapping
- density and types of buildings
- place names and earliest references
- communication types and patterns
- comprehensive and selective historic mapping

- aerial photographs
- documentary sources
- historic environment record (HER)³ data
- characterisation and extensive urban studies (EUS)⁴
- statutory and non-statutory designations.

In many, especially urban, areas, rebuilding may have taken place many times over the same sites, resulting in overlays of building forms and styles which are often contained within an ancient framework. The richness of an area today may reflect the build-up of successive historic periods.

The appraisal should include a brief analysis of urban morphology (the way in which the area has changed over time) and historic maps to show how the layout has altered and developed. Understanding urban morphology can help guide the approach to new development, for example, by highlighting where historic street patterns have been obliterated by less appropriate development. For larger or more complex areas, the appraisal may also include, or identify the need for, an urban design analysis, which can help with understanding an area's strengths and problems.⁵

An appraisal is not an end in itself – and it should not result solely in a series of detailed descriptions of apparently discrete sub-areas, losing sight of the character of the area as a dynamic whole. The appraisal process should lead to a better understanding of the development of the area and what makes it the place it is today, and provide the basis for positive management of the conservation area.

The definition and importance of conservation areas

Conservation areas are widely considered to be useful by local authorities and more than 9,100 have been designated. The Act defines a conservation area as 'an area of special architectural or historic interest the character or appearance of which it is desirable to preserve or enhance'.⁶ Designation places certain duties on local authorities and these are described in *Guidance on the management of conservation areas*, page 9.

Deciding which areas are of 'special interest' and warrant designation is a matter for local planning authorities, using adopted local criteria drawn up for the authority's area as a whole and involving the local community, perhaps through the development plan document process. For the designation of conservation areas to be effective, however, it is important that rational and consistent judgements are made in determining their special qualities and local distinctiveness, as well as their value to the local community. Such judgements should be based on a thorough understanding of the area in its wider context, reached through a detailed appraisal of its character.

³ Formerly the SMR (sites and monuments record)

⁴ See www.english-heritage.org.uk/server/show/nav.1294 for information on EUSs

⁵ Helpful guidance on urban design is provided in *By Design – Urban design in the planning system: towards better practice* DETR (2000)

⁶ Section 69 (1)(a)

Benefits of appraisal

A clear, comprehensive appraisal of the character of a conservation area provides a sound basis for development control and for developing initiatives to improve the area. The Planning and Compulsory Purchase Act 2004 requires determination of planning applications to be made in accordance with the provisions of the development plan, unless material considerations indicate otherwise.⁷ A clear definition of those elements which contribute to the special architectural or historic interest of a place will enable the development of a robust policy framework for the future management of that area, on which applications can be considered. PPG 15 stresses the need for local planning authorities to define and record the special interest, character and appearance of all conservation areas in their districts.⁸

A local authority's reasoning for designating a conservation area, as set out in a formal character appraisal published in support of a supplementary planning document (see *Guidance on the management of conservation areas*, pages 6-7), will be taken into account by the First Secretary of State in considering related planning appeals. Where asked to make a direction⁹ allowing a local authority to carry out urgent works to preserve an unlisted building in a conservation area, the First Secretary of State is more likely to do so where the area's special interest has been clearly defined and published. This information will also be helpful to those considering investment in the area and can be used to guide the form and content of new development. If funding is sought for grant-aid, such as a Townscape Heritage Initiative (THI), an appraisal can be useful in demonstrating the value of the area.

Beyond their use as planning tools, appraisals have a much wider application as educational and informative documents for the local community.

Assisting the management and development control process

It is vital, therefore, for the special interest justifying designation to be clearly defined and analysed in a written appraisal of the area's character and appearance. This will not only provide a sound basis, defensible on appeal, for policies in the relevant supplementary planning documents and area action plans and for development control decisions, but will also form the framework for developing a management strategy for the area (see *Guidance on the management of conservation areas*, page 14). The need for an authority to have up-to-date appraisals and related management proposals for all its conservation areas is the subject of a new three-part heritage "Best Value Performance Indicator"¹⁰ (see *Guidance on the management of conservation areas*, page 4).

Appraisals should be carried out for all new, or extensions to existing, conservation areas as a matter of course, in order to inform the designation process. If a local authority has many conservation areas, priority should be

⁷ See Section 38(6).

⁸ PPG15, paragraph 4.4

⁹ Section 76

¹⁰ BV 219(a)-(c) *Preserving the special character of conservation areas* issued by ODPM on 28 February 2005

given to preparing appraisals for those areas where the pressure for change is greatest. These are often in the historic retail (high street) or commercial centres, areas where significant development proposals are anticipated, areas where pressure for residential development is high, or areas of economic decline in need of regeneration.

To be effective, appraisals should be realistic, succinct and as informative as possible. A distinction should be made between the character appraisal and related management issues, which should be dealt with in a related management strategy based on the appraisal (see page 21). The appraisal should, of course, identify problems and pressures and recommend where further analysis, specific action or detailed guidance is required. Both elements – character appraisal and management strategy - should be as concise as possible: a practical advantage of shorter documents is that they can be modified and regularly updated (perhaps as frequently as every year or two in areas undergoing rapid change) with relative ease.

UNDERTAKING A CONSERVATION AREA APPRAISAL

Involving the community

Over the past thirty years, the approach to designating conservation areas has changed significantly and much greater emphasis is now placed on involving the local community in evaluating what makes an area ‘special’, whether it should be designated and where the boundaries should be drawn. Public participation should be an integral part of the appraisal process: further advice on community involvement can be found page 21.

Consultation

Once a conservation area appraisal has been completed in draft form, it should be issued for public comment. Local consultation can help to bring valuable public understanding and ‘ownership’ to proposals for the area. Thought should be given to encouraging a wide public debate, drawing together local people, residents’ groups, amenity groups, businesses, and other community organisations, in a discussion about the issues facing the area and how these might be addressed. Ideally, consultation should be undertaken generally in line with the local authority’s statement of community involvement (SCI) – see *Guidance on the management of conservation areas*, page 10.

The form of the appraisal

Assessments of an area’s special architectural or historic interest should be based on a careful analysis of the area, which should be as clear and objective as possible. Conservation areas vary greatly in both their nature and character, from small rural settlements to historic enclaves within large conurbations, and from seaside-towns to country estates set in designed landscapes. They also differ in the extent to which they cover a settlement, whether the majority, or merely a part of it. Appraisals should differ accordingly and there can be no national prescription; local needs and resources should determine their scope and content. Set out below is a range

of headings that may be helpful in establishing an appropriate framework for an appraisal. Undertaking a thorough, comprehensive character appraisal involves a range of skills, including social and economic analysis and particularly some expertise in architectural history, urban design and archaeology.

The emphasis in the published appraisal should be on graphic presentation that makes an immediate, easily understandable impact. Wherever possible, local authorities should use a geographical information system (GIS) for its many benefits, from ease of revision and updating to its variety of outputs. Illustrations might include any, or combinations, of the following:

- a map that places the conservation area in its wider setting, whether within a larger settlement, or in the context of a rural landscape hinterland;
- a map or sketch that demonstrate the area's historical development and identifies places or buildings with particular historical associations;
- a map illustrating current uses, for example, related to different historic building types (residential, commercial, industrial);
- a townscape analysis map showing, for example, spatial issues such as important views into and out of the conservation area, landmarks, and open or green spaces; or temporal issues, such as the extent to which pre-urban landscape features (such as the lines of former field boundaries) survive in the current townscape;
- a map showing listed, locally listed (or buildings of townscape merit) and unlisted buildings or groups of buildings that contribute positively to the character or appearance of the area, scheduled monuments and areas of archaeological interest (this could be combined with the townscape analysis map, depending on the size and complexity of the area)
- photographic images or drawings of buildings and characteristic local details

It should be made clear in the text that no appraisal can ever be completely comprehensive and that omission of any particular building, feature or space should not be taken to imply that it is of no interest.

Characterisation

Characterisation (the mapping, describing, analysing and understanding of the existing townscape or landscape character¹¹) is a parallel technique that can help the appraisal process. Most historic characterisation studies define the distinctive historic element of today's urban and rural environment across large rural areas, or cover the whole of a settlement. They are therefore compiled at a strategic level and can provide a wider context for conservation area appraisals and help in defining boundaries, as well as providing some information for sustainable management even beyond the conservation area. Some specific characterisation techniques can also be used within conservation areas, for example, to identify distinctive 'character areas', or zones.

¹¹ *Using Historic Landscape Characterisation*, Jo Clark et al, English Heritage/Lancashire CC, 2004

Defining the special interest of the conservation area

Defining the 'special interest' of an area is the main purpose of an appraisal. The distinctiveness of a place may well derive from more than its appearance (the Act makes it clear that the character and appearance of a conservation area must be considered separately - although they may, in some cases, mean the same thing¹²). Such distinctiveness may draw on other senses and experiences, such as sounds, smells, local environmental conditions, or historical associations. The qualities of a place may change from daytime to night. Such intangible elements of character can be identified, but not directly protected or controlled. Defining and protecting what exists, such as buildings and the spaces between them (streets, squares, paths, yards, and gardens), can help to sustain the activities and uses that contribute to the special character of a place.

Defining character, or special interest, involves more than simply recording the appearance of the area, its individual buildings and other heritage assets, and documenting its historical development. It includes understanding (describing and analysing) and assessing the value or significance of the area, both in its parts and as a whole. Taking account of the values attached to the area by the local community and all those with a legitimate interest in it will be a vital element of that process.

SUGGESTED FRAMEWORK FOR A CONSERVATION AREA APPRAISAL

Introduction

This should explain the background to the study and describe the general identity and character of the conservation area (including when it was designated), its place within the wider settlement or surrounding landscape, the scope and nature of the appraisal and the dates of survey, adoption and publication. Any significant sources of information might also be mentioned.

The planning policy context

The national, regional and local policy framework should be set out, with reference to the local development framework. A brief explanation of what a conservation area is should be included, with an explanation of its 'special architectural or historic interest', and a summary of the implications of designation and the local authority's duties in regard to conservation areas.

Definition (or summary) of special interest

This is the core of the appraisal, where the 'special architectural or historic interest' of the area that warrants designation, the 'character or appearance of which it is desirable to preserve or enhance', is defined. Assuming that the appraisal process has identified and analysed character areas or zones, the 'parts' will have been described in detail and the special interest of each area evaluated. But the whole is generally greater than the sum of its parts and this should be articulated and defined. Recognising the value or values

¹² See Mynors, C *Listed Buildings, Conservation Areas and Monuments* 3rd edition, 1999, paragraph 8.8.4

attributed to the area by the local community and all those with a legitimate interest in it is a vital part of that process.

The definition of special interest should provide a vivid, succinct picture of the overall conservation area as it is today - a dynamic, evolving place, which is experienced through all the senses - and evaluate its key characteristics. For example, the definition might assess the importance of the wider context (the relationship of the conservation area to its setting and the effect of that setting on the area); recognise the significance of the time dimension (the still-visible effects/impact of the area's historic development on its plan form, character and architectural style); identify spatial qualities and their experiential impact; define the significance of the physical (the historic buildings and other heritage assets, their intrinsic importance and the contribution they make to the townscape) and describe the intangible (historic associations, former uses, smells). It should seek particularly to define local distinctiveness and the sense of place, those qualities that make the area unique.

It should not only identify the aspects of the area's character that create a lasting impression on both those who live in the area and those who visit or pass through it, but also evaluate the key characteristics that need to be preserved and enhanced, in order to provide a basis for decisions about management and change. Recognising the value or values attributed to the area by the local community and all those with a legitimate interest in it is a vital element of that process.

Assessing special interest

Location and setting

Location and context

- A factual description of the location of the area and its regional context should be provided. Brief references to economic profile, general condition and existing or potential forces for change might usefully be included.

*Example: Hursley is situated in Mid Hampshire, approximately halfway between the historic towns of Winchester and Romsey. It is set within an undulating chalk and clay landscape, with a series of scarp slopes to the north of the settlement, which gives this part of the downs its distinctive character. There is a population of 793 living within the parish.
(Winchester County Council: Bursley Conservation Area Assessment 1996)*

- Where the conservation area covers only part of a settlement (whether village, town or city), the designated area should be set in its geographical and historical context in relation to the character and appearance of the whole settlement.

General character and plan form

- This should offer a brief description of the general character or nature of the conservation area (urban, suburban, or rural) and its existing plan form, whether linear or compact, dense or dispersed.

Example: Mortlakes's physical character derives from its relationship with the River Thames, which has served over the centuries to not only to bring the village into existence, but also to mould the form of the settlement's development along the bank and on parallel routes formed later by the railway and roads. This stretch of the Thames forms a long and even curve between Barnes Railway Bridge and Chiswick Bridge and is often referred to as Mortlake Tideway. (London Borough of Richmond upon Thames Mortlake, Mortlake Green and Queen's Road conservation area study, 1998)

Landscape setting

- The topography of the area, the setting of the conservation area and its relationship with the wider landscape (if relevant) should be described, with reference to any existing historic landscape characterisation (usually held by the county council, National Park authority, or AONB authority) where possible. The landscape setting is often an important part of the character of an area, particularly in small rural settlements. Ever-present views of surrounding hills, or glimpses of landscape from urban streets, can contribute significantly to the atmosphere of a place. Understanding how the built-up area expanded onto rural land, for example, whether pre-urban tracks and roads, or hedges and woodland, still survive as the 'framework' of the area is also important.

Example: The centre of the village remains strongly linked to its historical rural surroundings, with open land cutting into the core at Manor Garth and Sailor Fields. These links are vital to illustrate Addingham's historic origins. The open spaces and gaps between the buildings allow constant views out to the countryside and hills. These again provide important links between the village and its surroundings. The setting of the village in the slight valley of Town Beck adds to the character, providing gradient, a varied roofscape and potential for views over the village. (Bradford Metropolitan District Council: Addingham conservation area assessment, June 2002)

- Panoramas and view points should be identified and evaluated. Distant views of the settlement and those in the approach to it may contribute to lasting impressions of its character, and should also be evaluated. Any landmark structures, such as church towers or prominent public buildings, should be noted, as well as any common building height resulting from past influences or planning restrictions, perhaps to safeguard a particular landmark.
- Where relevant, the village edge or urban boundary should be defined and its importance analysed. In rural settings, adjacent Areas of Outstanding Natural Beauty (AONBs) or Areas of High Landscape Value may penetrate

into the built-up area, and the importance of such designations should be explained.

Example: The 500 years of fortifications emphasise the strategic outlook from the site, which controls the channel between Mount Edgecumbe and Drake's Island. It is a point to look out from. The views to the sea and reciprocal views of the peninsula from the sea, Mount Edgecumbe, and Drake's Island are dramatic and characteristic of the defensive transformation of the natural landscape around Plymouth Harbour.

(English Heritage and Plymouth City Council: Stoneford/ Durnford Street, Plymouth, Conservation Area assessment 1995)

Historic development and archaeology

The origins and historic development of the area

- This is most effectively shown on a map, and preferably within a GIS, marking key periods in the area's history and highlighting the survival of those historic elements which have determined the form of the conservation area today. These might include, for example, a medieval road pattern, former defensive lines, watercourses, burgage plots or other significant boundaries, estate walls, formal layouts, and the relationship of buildings to open spaces. The influence of new lines of transport, such as canals and railways, can also be shown. Map regression (comparing successive historic maps, usually Ordnance Survey, but including tithe and enclosure maps where relevant) should be the starting point for the historical analysis. Beyond the earliest detailed maps, archaeological and urban morphological methods can help to reconstruct the earlier stages of historical development, which often still have an influence on the current townscape.
- The supporting text should summarise the settlement's history, showing how this has shaped the development of the area and how its effect is evident in the plan form. It may be helpful to provide a list of books and other sources where the local history is described in more detail.

Example: The development of the hosiery trade during the final years of the seventeenth century, coupled with population growth, saw the gradual increase in development pressures in the Lace Market marking the beginning of the change to a working district. The subsequent development of the internationally important lace trade during the eighteenth and nineteenth centuries led to the redevelopment of the area with specially commissioned warehouses and showrooms of grand design, reflecting the status of their owners. Despite their size and architectural complexity, these premises were constructed to a high density on the original medieval street pattern, giving the area its strong canyon-like character.

(Nottingham City Council: Lace Market CAP Action Plan 1995)

Archaeology and conservation areas, including any scheduled monuments

- An area's character can often be appreciated further through information from archaeological studies. Archaeological remains, whether above ground structures, earthworks, or buried deposits, often contribute directly to the sense of place evident in the present day-area. They also represent a potentially rich resource for future research, interpretation and education
- Reference should be made to the local historic environment record (HER); where significant archaeological potential is indicated, this should be covered in the appraisal. HERs hold useful information and their staff, who often have an extensive knowledge of the area, may be able to help. Where these have been undertaken, intensive or extensive urban surveys¹³ can provide further information and this is usually held in the local HER. If there is known below ground archaeological potential, it may be helpful to include (if available) a map or deposit model showing the archaeologically sensitive area. Any scheduled monuments should also be shown on a map.

Example: The fifteenth-century Cromford bridge and the ruins of its bridge chapel are scheduled ancient monuments. The seventeenth-century subterranean watercourse of Long Sough/Cromford Sough is also scheduled. In addition to this, there are numerous sites on the county Sites and Monuments Record relating to the village's industrial history, reflecting its importance in this regard. The totality of the village's industrial archaeology is important because of:

- i) the number and variety of water powered sites*
 - ii) the connection many of them have with Arkwright's industrial innovations*
 - iii) their preservation, state of completeness, and unspoilt setting*
- (Derbyshire County Council: Cromford CAP Action Plan 1995)*

Spatial analysis

The character and interrelationship of spaces within the area

- The importance of open spaces within (or sometimes immediately beyond) the conservation area, the way they are enclosed, and the visual contribution they make to the character of the place should be defined and shown on a townscape analysis map. The relationship between public space (such as a market place, street, square, public garden or car park) and private space (gardens, courtyards or playing fields), the qualities they offer and the ways in which the spaces were and are used should be described, as should key settlement edges.

Example: Yorkersgate has a strong vertical emphasis resulting from the predominance of sliding sash windows, chimney stacks and pots, and the

¹³ Information on *Historic Town and City Surveys*, a national programme supported by English Heritage of surveys of the archaeology, topography and historic buildings of England's historic towns and cities, can be found at www.english-heritage.org.uk/server/show/nav.1294

scale of the building relative to the street width. This emphasis is maintained to the rear where, due to the rising ground from the river, the buildings appear as a manmade cliff of some visual drama. Beyond Market Street the building line is less rigid and the scale of the buildings reduced on the north side to make the transition from the urban to rural context. (Ryedale District Council, N Yorkshire: Malton Conservation Area 1994)

Key views and vistas

- Important views into and out of the conservation area, key vistas, landmark buildings and unfolding views within the area should be identified and illustrated on a map.

Example: A virtue of the present form of development along the river frontage is the number of narrow spaces and gaps which occur and afford views into the landscape of Mortlake village and beyond. The unusual brick, stone and flint tower of St Mary's Church...is a key landmark, sight of which may be obtained from numerous vantage points on either bank at varying distances. The view of the church from Thames Bank and the towpath to the west from Chiswick Bridge is equally significant.... The views from both Chiswick Bridge and Barnes Railway Bridge are important in highlighting the different characters of the facing banks of the tideway. (London Borough of Richmond upon Thames Mortlake, Mortlake Green and Queen's Road conservation area study, 1998)

Character analysis

Definition of character areas or zones

- In larger conservation areas, discernible character areas or zones are often evident. These may already have been defined by historic landscape characterisation or an EUS and may reflect the predominant historic character that survives from earlier periods, for example, areas of Georgian, Victorian or later residential development, or the original function, class distinctions, design or current uses. The areas where industrial, commercial, civic or transport-related activity is prevalent should also be identified. The sub-areas may overlap or have 'blurred edges', for example where a 19th century development is partly on historic urban plots and partly in former fields. There can be 'zones of transition' between areas of consistent character.
- These character areas should be analysed using the checklist headings below and illustrated on a plan. Assessment of the character areas should aim to provide more than just a detailed description of the physical constituents - it should also evaluate the significance of the sub-area concerned and summarise its special interest.

Example: The character area boundaries in a complex and layered urban environment are inevitably subjective in places, and based not just on architectural or historic characteristics, but on the dynamic experience of the

area – how it is perceived when walking or driving through it, and when ‘boundaries of experience’ are crossed. This includes such sensations as awareness of enclosure or openness, and degrees of noise or activity, which provide edges to areas just as much as map-based boundaries, or changes of use. (Enfield Town conservation area - draft character appraisal for London Borough of Enfield, April 2005).

- Where this approach is adopted, it is essential that the character areas are considered in the context of the area as a whole, or of the wider settlement, if the conservation area covers only a part of it. As well as the more detailed assessments of its component parts, a balanced and comprehensive understanding of the special interest of the conservation area as a whole is needed. The information derived from the character areas should therefore be drawn together at the end, in order to consider the quality, significance and condition of the conservation area overall (see advice on definition of special interest, page 9).
- Given the diverse and unplanned nature of many conservation areas, however, this approach may not always be appropriate. The appraisal might instead highlight the influence that change over time has had in the development of the area, for example, by creating diversity and contrasts in architectural styles. Note might also be made of the impact of different national and international planning and architectural movements on the area.

Activity, prevailing or former uses within the area and the influence of these on the plan form and building types:

- The form and grain of the layout of different sub-areas of the conservation area should be examined: for example, grand terraces with mews, villas set in generous gardens, workers' back-to-back housing, or industrial buildings connected with particular activities, local trades or specialised markets. This will help to inform understanding of the way in which the area grew and functioned over time. The effect or influence of any historic patronage should be noted and described (eg estate workers' housing, a philanthropic model settlement, etc.)

Example: This area of land was acquired and developed piecemeal by Jedediah Strutt to provide terraced housing and allotments for his mill workers. The layout evolved to its present appearance over a period of 100 years or more, land first being acquired in the late eighteenth century. The Strutt Estate concentrated its efforts here on providing well built housing laid out with gardens and allotments in a spacious setting The houses vary in detail from row to row, with different heights, layouts and materials, as the Estate experimented with designs. There is, however, uniformity in the building line and in the character of each row which gives the area a strong cohesive identity. There is also evidence of small of nailshops and workshops amongst the housing, which were provided by the Strutts to help find employment for their male tenants, who were not the principal

workforce in the factory. (Derbyshire County Council: Belper CAP Action Plan 1995)

The architectural and historic qualities of the buildings and the contribution they make to the special interest of the area

- Most of the buildings in a conservation area will help to shape its character in one way or another. The extent to which their contribution is considered as positive depends not just on their public face, but also on their integrity as historic structures and the impact they have in three dimensions, perhaps in an interesting roofscape, or skyline. Back elevations can be important, as can side views from alleys and yards.
- This part of the appraisal should include a general description of any dominant architectural styles, the prevalent types and periods of buildings, their status (ie statutorily or locally listed) and essential characteristics, and their relationship to the topography, and/or the skyline. Individual buildings or groups that contribute positively to the character or appearance of the area and those that are distinctive (for example, because they are rare or idiosyncratic), should be identified on a map. The significance of vernacular traditions is important and should be noted, as should examples of polite architecture that reflect wider influences. This section may need to be amplified by an audit of the heritage assets - see below.

Example: The plot widths fronting Old Steine are very irregular and there is no uniform roofline. Several buildings here were built individually rather than as terraced developments. The unifying features are the materials -especially stucco render- and architectural features such as balconies, bays, sash windows and Regency classical details. On the eastern side the buildings mostly date from around the same period (although several were refronted later in the nineteenth century) and here there is a consistent terraced building line, set back slightly from the pavement to accommodate basements, with iron railings providing a consistent front boundary. The plot widths vary but there is a strong vertical emphasis throughout. This verticality is spoilt only by the twentieth-century Job Centre building on the corner of St James's Street. (Brighton Borough Council: Valley Gardens Conservation Area 1996)

- The twentieth century is often the most undervalued and vulnerable period of building and it will be important for the appraisal to recognise, where appropriate, the contribution made by twentieth century modern movements (many of which are currently being revived).

The contribution of key unlisted buildings

- It is often helpful to identify those key unlisted buildings that make an important contribution to the character of the conservation area, as well as those which clearly detract from it and could suitably be replaced. A checklist of questions to help with this process can be found in appendix 1.

- Recommendations for new or additional ‘buildings of townscape merit’ or locally listed buildings could form part of the appraisal, especially where the existing statutory list is of some age. If there is no ‘local list’, the appraisal might recommend the introduction of a local category for identifying important unlisted buildings.

Example: Recommendations for additions to the local list: 1-2 Southbury Road (Lloyds TSB) - A robust, three storey red brick building of about 1890, with stone dressings and a stone-faced rusticated ground floor, and steep tiled roof with dormers. It has two principal elevations, the entrance on a splay between them, under a carved stone shell hood. The building retains its original use and character and makes a significant statement on the corner of Southbury Road and Silver Street, and in the views from adjoining roads. It is one of a series of bank buildings in the town centre (not all in their original use), which act as ‘punctuation’ and as landmarks in the street scene because of their scale, quality of detail and materials and confident design. (London Borough of Enfield: Draft Enfield Town conservation area character appraisal, 2005)

Local details

- Local constructional or joinery details, including characteristic historic shopfronts, and unusual local features often make a vital contribution to local distinctiveness. Their form and locations should be recorded, and their significance noted.

Example: The Lion Houses were built by James Nicholl between 1899 and 1903. Similar houses had already been erected by him in the Hurlingham area of Fulham. The lugubrious lion figures identify the work of Nicholl, although the widespread use suggests that he may have taken delivery of rather more than he intended, and one account indicates 1000 lions were supplied by mistake for the 100 ordered by the builder. In any event, the small creatures were used with abandon and surmount gate-piers, bays and parapets to form an attractive and unusual feature of the houses. (London Borough of Richmond-upon-Thames: Barnes Green conservation area: the Lion Houses 1992)

Prevalent and traditional building materials and the public realm.

- The range of prevalent and traditional materials in the area for buildings, walls, and ground surfaces, particularly those which are characteristic of the local vernacular, should be described. As well as recording the types of materials to be found, it will be important to note their textures and colours and the ways in which have been used.
- Any surviving historic surfaces should be recorded, and their importance to the special interest of the conservation area explained. Existing historic or unusual street furniture should be noted, as should any other distinctive elements that contribute to the character or appearance of the public realm. In some conservation areas, where significant change to public

space is proposed, an audit of the public realm may be appropriate – see below: the appraisal might usefully note if such an audit needs to be undertaken.

Example: Red brick: a rich warm colour, with a range of bonded constructions: stretcher, English, and Flemish. A characteristic feature in many of the earlier nineteenth-century buildings is the use of Flemish bond with darker burnt headers, giving an overall pattern to the wall. Some of the later Victorian buildings have a blue brick string and decorative courses. New red sandstone: a soft, friable warm stone usually dressed in some form with saw marks, giving a rough textured finish or finely jointed smooth finished ashlar block work. Grey sandstone or millstone grit: harder grey building material, with a rougher- textured finish ashlar. This stone is usually coursed, with the surface of the blocks showing a tooled finish. (Leek Action Plan, Civic Trust Regeneration Unit 1992)

An audit of heritage assets

- An audit will only be needed in larger, more complex areas, where there is a wide range of historic structures, and/or in areas with an industrial heritage. It should consider only extant features and structures and not those with buried archaeological potential (unless this is a specific requirement of the appraisal, in which case the input of an appropriately qualified archaeologist with relevant experience will be needed). The general condition of the assets should be recorded. The results are probably best tabulated and included as an appendix to the appraisal, and/or on a map.

Example: The conservation area contains 3 scheduled monuments and 26 listed buildings. Of these, one is listed at grade I, while all the others are listed at grade II. Of this latter group, the listing entries for 21 note that their listing is at least partly based on their group value with other associated buildings or structures.....The audit classifies the heritage assets according to an assessment of their relative architectural and/or historic significance, any enhanced significance due to group value, and the contribution that each makes to the special interest of the conservation area. The tabulated results of the audit are included at appendix 1 ... and can be cross-referenced to figures 10a-c. (Smethwick Summit, Galton Valley, Smethwick - conservation area appraisal for Sandwell MBC, April 2002)

The contribution made to the character of the area by greenery and green spaces; and its ecology and biodiversity value.

- The importance of parks and gardens, both public and private, should be identified, particularly any sites that are included on the *Register of parks and gardens of special historic interest* (compiled by English Heritage), and their contribution described. Domestic gardens, especially planted front gardens, can make a significant contribution to the character of many conservation areas and should be mentioned.

- Trees, hedges and street greenery are a vital element of many conservation areas, not only in public places, but on private land as well. Important single trees and groups should be identified and described in their locations. Their species, condition and potential lifespan should be assessed, so that a strategy for maintenance and replanting can be devised.

Example: The penetration of open space, afforded by the recreation ground, provides an opportunity for the mature tree groups of the Park Vale and the Vicarage to emerge as a dominant feature of the conservation area. This wooded area comprising a mixture of trees including yew, ash, holly, and sycamore, together with a glimpse of Church Lodge with its decorative stacks, is one of the most striking and contrasting internal views from the street level. (Winchester City County Council: Hursley Conservation Area assessment 1996)

- Some conservation areas are notable for their ecology/wildlife value. In others, these issues may need to be addressed when reviewing buildings, sites or areas that may contain protected species and/or habitats.

Example: The land around the Rendlesham viaduct is designated a wildlife corridor and the wooded portion of Hilly Fields Park north of the Turkey Brook is designated as an area of nature conservation importance. A survey by the London Ecology Unit (now part of the GLA) in 2000-01 greatly enlarged the area of nature conservation importance by extending it eastwards and designating it a site of Borough importance. In addition, a part of Hilly Fields Park was identified as a site of Metropolitan nature conservation importance. Details of these designations can be found in Appendix 10.4. (London Borough of Enfield: Clay Hill Conservation Area draft appraisal, March 2005)

The extent of intrusion or damage, ie the negative factors

- The appraisal should identify elements which detract from the special character of the area, and which offer potential for change. These might include the consequences of harmful pressures on an area (see below), such as the loss of front gardens to hard standing for cars, the loss of traditional architectural features and fenestration, or the existence of unattractive gap sites.

Example: A number of large buildings have a negative impact on the conservation area; Ada Belfield House and the police station in particular are inappropriate in scale, design, and materials (although the police station is not in prominent view). The station car park served by Field Lane is an area of open tarmac from which the rear elevations of properties on Bridge Street and Wellington Terrace can be seen. The form of the car park does not relate to the strip pattern of east/west development and the hard surface is alien in this setting of mature landscaped gardens. (Derbyshire County Council: Belper CAP Action Plan 1995)

The existence of any neutral areas

- Those areas which neither enhance nor detract from the character or appearance of the conservation area, but where there might be potential for enhancement, should be recognised. These may include gap sites and poor buildings that might be replaced with something better.

Example: The housing redevelopment schemes on Avenham Road and Glover Street can be viewed as neutral areas, although their landscaping is very attractive and helps to soften the appearance of the adjacent terraces. The houses are of plain design built of brick with reconstituted stone dressings. Their bland appearance does not make a positive contribution to the character of the conservation area but they do not intrude. (Preston Borough Council: Avenham CAP Action Plan 1995)

General condition

- The general condition of the area, covering both its economic vitality and the physical condition of the historic buildings, other heritage assets and the public realm, should be described. Any buildings at risk, or in a serious state of disrepair, or related problems (for example, a major land/property owner or developer pursuing an obvious policy of deliberate neglect) should be recorded. In some cases, it may be appropriate to map surviving original architectural features and fenestration – distinctive local detailing, doors, windows, roof coverings - to aid future monitoring (see also page 24 of *Guidance on the management of conservation areas*).

Problems, pressures and capacity for change

- Generic issues that underlie obvious problems (such as the effects of heavy traffic, a low economic base resulting in vacancy and disrepair of buildings, or pressure for a particular type of change or development) should be identified, as well as specific examples (such as buildings at risk, or uncontrolled, inappropriate advertising). The need for additional controls, particularly Article 4 directions, to prevent further erosion of the area's special interest, should be noted (guidance on Article 4 directions can be found in *Guidance on the management of conservation areas*, pages 17-19), as should potential capacity for beneficial change.

Example: Within the Barton-upon-Humber conservation area there is a number of threats to the character of the conservation area, particularly caused by neglected and empty sites and buildings, a general lack of maintenance of the existing historic buildings, the use of modern replacement windows and doors, the loss of pantiled roofs and poor control over alterations (particularly shopfronts and windows)...The building of the Humber Bridge has provided some impetus to the local economy, but the lack of 'national' shops in Barton indicates the low levels of investment in the town centre. ((North Lincolnshire Council Barton-upon-Humber 2nd draft conservation area appraisal, March 2002)

Community involvement

Involving the community (and raising public awareness) should be an integral part of the appraisal process and should be approached in a pro-active and innovative way. The appraisal itself should include a report on how community involvement and public consultation has been undertaken, for example; by delivering leaflets to all the houses and businesses in the area; making contact with key community groups and providing briefing sessions, if required; holding a public workshop; publishing the draft appraisal on the council's website, accompanied by an electronic comments sheet/feedback form; and use of the media and press releases. The report should explain how the input from the community was evaluated and how it has been taken into account in defining the special interest of, and recommendations for, the area. In the final analysis, heritage is what people value.

Suggested boundary changes

An important aspect of the appraisal process will be considering where the boundary of the conservation area should be drawn. Many early conservation areas were too tightly drawn; if this is the case, extension of the existing boundary should be considered and the wider setting of the conservation area taken into account. An explanation of why the boundary is drawn where it is (or extensions are suggested, in the case of existing conservation areas), what is included and what is excluded, will be helpful. For existing areas, the appropriateness of current boundaries should be regularly re-assessed, perhaps on a five-year cycle (see also *Review in Guidance on the management of conservation areas*, page 12).

Local generic guidance

The appraisal should identify where generic guidance would be helpful and the issues it should address. Further advice on the provision of guidance, both policy and topic-specific, can be found in *Guidance on the management of conservation areas*, page 25.

If required, this section might provide an overview of and summarise the main problems and pressures identified in the analyses of the character areas. Issues that will need to be addressed through statutory action by the local authority, and the type of statutory action required, should be emphasised.

Useful information, appendices and contact details

This section might include references to the principal sources of historic and local information, a short glossary of relevant architectural and vernacular terms, an audit of heritage assets, the criteria used for assessing the contribution made by unlisted buildings in the conservation area, useful names and addresses (of both national and local organisations) and the local authority's contact details for enquiries and comments.

Management proposals

Once the appraisal process has been completed, proposals for the future management of the area will need to be developed. These should take the form of a mid- to long-term strategy for preserving and enhancing the conservation area, addressing the issues and recommendations for action

arising from the appraisal and identifying any further or detailed work needed for their implementation (further advice on developing a management strategy can be found in *Guidance on the management of conservation areas*, page 14). The strategy should define what policy guidance in the relevant SPD is applicable to the conservation area, set out proposals specific to the area (such as the imposition of an Article 4 direction, or an improvement scheme for the public realm) and suggest a timescale for implementation. Management proposals can usefully form part of the same document as the appraisal, but should be contained in a separate section, not least because they may need to be reviewed and updated more frequently than the appraisal.

A summary of the suggested format for a conservation area appraisal is included at appendix 2

NEXT STEPS

Adoption procedures

Once consultation has been completed and the appraisal and the resulting management proposals have been revised to take account of public responses, they should be adopted formally through the local authority's current internal procedures prior to publication in support of the relevant supplementary planning documents(s) (see *Guidance on the management of conservation areas*, page 7).

Local authorities' standing orders vary, but the process is likely to involve a report by officers to the relevant committee and/or formal endorsement by the council - this will certainly be the case if the appraisal contains recommendations for Article 4 directions, or boundary revisions. The date of formal adoption should be recorded in the final document. The contribution made by consultees and others should be acknowledged. The adopted appraisal should then be published as a printed document and made available on the authority's website. Many authorities find a single A4 summary sheet for each conservation area a useful addition to the full document.

Monitoring

Changes in the appearance and condition of the conservation area should be monitored regularly and action taken promptly to deal with problems as they arise. Ideally, a dated photographic record of the area should be created during the appraisal process, since this provides an invaluable aid to any later enforcement action (see also *Guidance on the management of conservation areas*, page 24). Monitoring should also include following up and publishing information from time to time on the local authority's progress with implementing the proposals included in the management strategy for the area.

Review and updating

Conservation area character appraisals need to be reviewed regularly, not least because of the requirement in BV 219b for them to be up to date (see *Guidance on the management of conservation areas*, page 4). Ideally,

existing appraisals should be reviewed every five years. This does not mean starting again from the beginning, especially where there has been little significant change in the area concerned and the existing appraisal is sound.

The character and appearance of most conservation areas, the special interest that warrants designation, generally does not change rapidly (and certainly should not if proper management procedures are in place). The outcome of the five-yearly review might therefore result in an addendum to the existing appraisal, recording what has changed, confirming (or redefining) the special interest that warrants designation, setting out any new recommendations and revising the management strategy. The updated appraisal and related management proposals should be re-adopted by the local authority in support of the relevant SPD.

HELM

Historic Environment - Local Management (HELM) has been set up by English Heritage to provide local authorities with the tools they need to manage change in the historic environment with skill and confidence. Training is being provided for councillors and officers in local authorities and government agencies, including planners, highway engineers and land managers. See www.helm.org.uk

References and further reading

For current information, see historic environment section of the Department for Culture, Media and Sport (DCMS)'s website – www.culture.gov.uk

DCMS *Review of heritage protection: The way forward* (interim report)(2004)

DCMS and Department for Transport, Local Government and the Regions (DTLR) *Protecting our historic environment: Making the system work better* (2003)

DCMS and DTLR *The Historic Environment: A Force for Our Future* (2001)

English Heritage *Power of Place: The Future of the Historic Environment* (2000)

Department of the Environment, Transport and the Regions (DETR) and Commission for Architecture and the Built Environment (CABE) *By Design - Urban design in the planning system: towards better practice* (2000)

Department of the Environment (DOE) and Department of National Heritage *Planning Policy Guidance (PPG) 15: Planning and the Historic Environment* (1994)

DOE *Planning Policy Guidance 16: Archaeology and Planning* (1990)

Rippon, S *Historic landscape analysis: Deciphering the countryside* Council for British Archaeology (2004)

Joyce, B, Michell, G and Williams, M *Derbyshire: detail and character* Alan Sutton Publishing Ltd, Stroud ISBN 0 75090737 1 (1996)

Clifford, S and King, A *Local distinctiveness* Common Ground Publications, London ISBN 1 87036411 2 (1993)

HELM: *Your guide to the historic environment*, 2004 (www.helm.org.uk)

English Heritage *Understanding Place: Guidance on the management of conservation areas* (2005).

English Heritage *Using Historic Landscape Characterisation* (Jo Dark et al with Lancashire County Council) (2004)

English Heritage/ CABE *Building in context: new development in historic areas* (2001)

Clark, K for English Heritage *Informed Conservation* (2001)

English Heritage *Streets for All* (London, 2000; Regional versions 2005)

CABE *Making design policy work: How to deliver good design through your local development framework* (2005)

English Historic Town Forum *Conservation Area Management - A Practical Guide* (1998)

Cathedral Communications *The Building Conservation Directory* (published annually)

Text prepared for English Heritage by
Anna McPherson of The Paul Drury Partnership.

APPENDIX 1

Unlisted buildings in a conservation area

When considering the contribution made by unlisted buildings to the special architectural or historic interest of a conservation area, the following questions might be asked:

- Is the building the work of a particular architect of regional or local note?
- Has it qualities of age, style, materials or any other characteristics which reflect those of at least a substantial number of the buildings in the conservation area?
- Does it relate by age, materials or in any other historically significant way to adjacent listed buildings, and contribute positively to their setting?
- Does it individually, or as part of a group, serve as a reminder of the gradual development of the settlement in which it stands, or of an earlier phase of growth?
- Does it have significant historic association with established features such as the road layout, burgage plots, a town park or a landscape feature?
- Does the building have landmark quality, or contribute to the quality of recognisable spaces, including exteriors or open spaces with a complex of public buildings?
- Does it reflect the traditional functional character of, or former uses within, the area?
- Has it significant historic associations with local people or past events?
- Does its use contribute to the character or appearance of the conservation area?
- If a structure associated with a designed landscape within the conservation area, such as a significant wall, terracing or a minor garden building, is it of identifiable importance to the historic design?

In English Heritage's view, any one of these characteristics could provide the basis for considering that a building makes a positive contribution to the special interest of a conservation area, provided that its historic form and values have not been seriously eroded by unsympathetic alteration.

APPENDIX 2

Summary of suggested format for a conservation area appraisal

Introduction (background to the study, scope and structure of the appraisal)

Planning policy framework (national, regional and local, with reference to the local development framework)

Definition (or summary) of special interest

Assessment of special interest - suggested checklist headings:

Location and setting

Location and context, including a conservation area map

General character and plan form

Landscape setting (topography and land form; geology; setting of the conservation area and its relationship with the setting/landscape; identification of significant landmarks and panoramas).

Historic development and archaeology

The origins and historic development of the area

The archaeological significance and potential of the area (including identification of scheduled monuments).

Spatial analysis

Character and interrelationship of spaces within the area

Key views and vistas (both out of and into the area; view points)

Character analysis

Definition of character areas or zones - characterisation

Activity, prevailing or former uses within the area, and influence of these (and any historic patronage) on the plan form and building types

The architectural and historic qualities of the buildings and the contribution they make to the special interest of the area

The contribution made by key unlisted buildings (including any recommendations for locally listed buildings)

Local details

Prevalent local and traditional building materials and the public realm

An audit of heritage assets (if appropriate)

The contribution made by greenery and green spaces: and ecology/biodiversity value

The extent of loss, intrusion, or damage, ie negative factors

The existence of any neutral areas

General condition of the area and built fabric, identification of BARs

Problems, pressures (including need for any Article 4 directions), and the capacity for change

Community involvement (how the process was undertaken)

Suggested boundary changes (extensions, deletions, if relevant)

Local generic guidance

Summary of issues (including need for statutory action)

Useful information, appendices and contact details

Management proposals/strategy (developing a management strategy)

APPENDIX 3

GUIDELINES FOR COMMISSIONING CONSERVATION AREA APPRAISALS

This guidance provides a clear explanation of the importance and benefits of character appraisals, step-by-step advice on how to prepare them, what they should cover, and what the output should be. If consultants are to be commissioned to undertake the work involved, however, it may be helpful to bear the following in mind when writing the tender brief, or specification:

Context

- Provide background information on the commissioning local authority, its area, number and nature of existing conservation areas, approach to conservation, etc.

Objective of the commission

- Define the purpose of the character appraisal - why it is being prepared, what the expectations are, the need to involve the local community, how it will be published and used, etc – and if it is to be adopted as a supplementary planning document.

Scope of the work

- Be specific about the process to be undertaken - define the information to be gathered, issues to be considered/addressed (eg apparent need for Article 4 direction(s)), any limitations, etc.
- Emphasise the need for the output to be an *appraisal* that describes, analyses and ascribes value to the character of the area concerned (ie assesses and defines its special interest): it should not just be a factual description of the physical fabric, character areas, etc, linked to historical facts.
- State whether a photographic record is required, eg to provide a baseline for measuring change and monitoring alterations/physical condition.

Relevant information and sources

- Indicate the extent of information likely to be available to the consultants (designation statement, relevant development planning policies, historic Ordnance Survey and/or conservation area maps available, where the HER is held, secondary (and sometimes primary) historical sources, including work already done/published by local groups, design/development briefs relevant to the conservation area, recent/current planning applications, etc), their sources and location.
- Think about particular issues that should be addressed/stressed/are locally sensitive and specify accordingly.

Consultation

- Emphasise the importance of community involvement in the process and buy-in to the outcome. Be specific about how consultation is to be undertaken, who the key stakeholders are, etc.

Outputs

- Be specific about the nature of the output, ie the form/format and content of the report, extent of illustrations/specific examples required
- Specify how information is to be delivered (number of hard copies, software for electronic copy, etc.) – bearing in mind the value of digital data for use in other contexts.
- Specify copyright/intellectual copyright ownership

Programme/timing

- Length of contract, start and finish dates
- Milestones
- Consultation period
- Delivery dates

Contacts and monitoring arrangements

- Project manager
- Monitoring/reporting arrangements
- Requirement for consultation on emerging draft(s) with project manager, within the commissioning local authority, etc.

Tenders

- Provide technical information - conditions (financial and other) to be met, what submission/bid is required, in what form, how it is to be delivered and by when (information from the tenderers should include CVs of those who would undertake the commission, a description of their relevant experience, examples of similar previous work and references).

Selection criteria

- Provide relevant information on the council's procurement procedures (it will be important to emphasise that the quality and scope of the tender will be as important a selection criterion as the price).

Payment arrangements

- Specify how and when invoices should be submitted and payment made, etc.