

Committee(s) Corporate Asset Sub Committee	Dated: 28 April 2021
Subject: The City's Heritage Estate - Update	Public
Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly?	1, 3, 7, 10,12
Does this proposal require extra revenue and/or capital spending?	No
If so, how much?	n/a
What is the source of Funding?	n/a
Has this Funding Source been agreed with the Chamberlain's Department?	n/a
Report of: City Surveyor	For Information
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Summary

The report provides an update on the key activities undertaken by the City Surveyor in 2020/21 to improve the asset management, maintenance and awareness of the City of London's (CoL) extensive and unique Heritage Estate of over 870 assets, and looking forward the focus for the year ahead.

Recommendation

Members are asked to note the contents of this report.

Main Report

Background

1. Officers provided Corporate Asset Sub committee with an overview of the Heritage Estate in September 2020. This was in order to broaden Members' understanding beyond the annual report on those CoL assets listed or at risk of listing on Historic England's Heritage at Risk Register. CoL is responsible for over 800 listed assets as described by Historic England below.

'The City of London Corporation own a unique and fascinating collection of heritage assets spanning nearly two thousand years of history. It is amongst the most diverse and extensive historic estates of all UK landowners.

Jane Sidell, Inspector of Ancient Monuments, Historic England.

2. The following strategic risks were identified in that report.
 - Availability of resourcing and limited cross-City heritage expertise
 - Poor heritage estate visibility resulting in lack of organisational support/awareness
 - Climate change and extreme weather conditions accelerating fabric deterioration
 - Health and safety issues which are difficult to predict
 - Reputational risk

3. Heritage assets are currently covered within the City Surveyor's Corporate Property Asset Management Strategy.
 - Maintain Heritage assets through investment and prevent their inclusion on the Heritage at Risk Register wherever possible (subject to available budget)
 - Ensure where Heritage assets are not in the sole ownership of the City to drive the collective responsibility to maintain and prevent their inclusion on the Heritage at Risk Register
 - Ensure operational assets are maintained to a good, safe and statutory compliant condition

Strategic Objectives and Outcomes

4. Following on from the risks articulated in last year's report, officers have developed a new framework of strategic objectives and respective outcomes to support an on-going review and improvement of the management, maintenance and visibility of the City of London's Heritage Estate.
5. The framework is simply a tool in order to put structure around the service and support it toward an end objective which is captured very well by the opening statement in the BSI guide for the Conservation of Historic Buildings

'The immediate objective of building conservation is to secure the protection of built heritage, in the long-term interest of society.'

See Appendix 1 for the objectives and full list of outcome indicators.

Key Achievements in 2020/21 towards Objectives

Objective 1 - HE staff and budgetary resources utilised effectively and appropriately

6. **New Heritage Estate Database** A key piece of infrastructure critical to being able to manage the portfolio was the development of a new single data base. It required identifying and consolidating six historic databases into one, an exceptionally involved process given none of the pre-existing data bases were compatible. Assets previously not listed were recorded and a number of assets such as the Barbican Estate were broken down to better align with the City Surveyor's properties database. As a result there are now listed 874 heritage related assets. See appendix 2.
7. The new database categorises assets in terms of reputational significance; it has embedded links to the surveys, conservation management plans and other key records; every asset has eastings and northings enabling all the data to be uploaded on to the public GIS, with associated descriptions and photos.
8. Most importantly it has allowed us to see the portfolio for the first time in its entirety and see how well it is understood in relation to surveys etc. However, it has also helped identify some gaps, such as the need to renew quinquennial survey data and the lack of a current Conservation Management Plan for key assets.
9. **Procurement** With the exception of the statutory cleaning and maintenance contract providing services for 104 statues in the Square Mile, appointing contractors for works to individual assets has been a fragmented process historically. To address this, two new bundles, CWP funded, have been identified and the procurement strategy agreed.
 - Five year contract for routine inspections of historical monuments and non-building heritage assets, including review of Conservation Management Plans
 - £16,000 pa.

- Five year contract for routine maintenance of all Scheduled Monuments and archaeological sites - £20,000.

10. **Non heritage Asset Management functions moved out of service** The Blue Plaque applications approval process has been passed over to Cultural & Visitor Development team in Town Clerks, given the process of approving applications is subject to assessment of the historic context, therefore not an asset management function. The City Surveyor will retain the responsibility to install and maintain.

11. **Staff time process efficiencies** To eradicate the need to apply for schedule monument consent every time works are required on the City Roman Wall, a new five year Management Agreement for annual inspection, de-vegetation and minor repairs has been established with Historic England for work on the City Wall (from Noble Street to All Hallows-on-the-Wall).

Objective 2 – Heritage Estate assets, building and non building structures are maintained to mitigate H&S risk and impacts due to climate change

12. **Identifying H&S concerns** – Reactive works were required at St Mary Aldermary and Christchurch Greyfriars. 18 locations, including eight churchyards have been identified by officers through surveys as having railings or retaining wall issues that need addressing to mitigate future H&S issues. Officers will be including CWP bids to address these works.

13. A review of the current quinquennial surveys in respect to gaps, scope, frequency (as in if undertaken when intended), funding, contract, is underway to mitigate future H&S matters.

14. The Guildhall Great Hall Stonework H&S major project was significantly delayed due to Covid. According to drone footage there are few areas of concern with regard the stonework. However, what has emerged is a concern regarding the degree of electrics and event debris observed at high levels. The major project will seek to address this by surveying the electrics and removing redundant wiring together with cleaning. The drone footage has highlighted the need to revisit protocols with services and their respective contractors to ensure that going forward the situation is not repeated.

Objective 3 – Heritage Estate assets are removed and or not added to HARR

15. A separate report to members on the HARR (Heritage At Risk Register) will be provided at the June committee meeting, but we can confirm that conservation works to the Roman Fort Gate House and the Roman wall in the London Wall car park were successfully completed to Historic England's satisfaction, last November, which ensures that these parts of the City Wall are not added to the HARR.

Objective 4 – Improve understanding and awareness of CoL Heritage estate among officers and members and its significance as within the top 5 prominent UK Heritage asset owners

16. One of the key objectives of establishing the database was to share knowledge. To begin this process officers conducted a workshop last December attended by 25 officers from across CoL. It was very well received and has generated potential collaboration between the CS Heritage Estate, Culture and Open Space colleagues.

Heritage Estate – Looking forward 2021/22 Work Programme

17. **Objective 1 - HE staff and budgetary resources utilised effectively and appropriately**

- Further promotion of the new database and making accessible to service departments as appropriate to support with local heritage asset decision making.
- Procurement of contracts for bundled services/works and using data base to identify further procurement efficiencies.

- Establish New Diocese Faculty five year agreement to reduce time consuming faculty approvals currently required for works on churchyards.
- Move Lord Mayors Show event staff co-ordination, 2 - 3 days/per week from August to December, out of City Surveyor to Lord Mayors Show Company or Remembrancers, and secure reimbursement to Heritage Estate asset management costs related to the event from Remembrancer's Lord Mayors Show budget.

18. Objective 2 – Heritage Estate assets, building and non building structures are maintained to ensure H&S and mitigate impacts due to climate change

- Clarify roles and responsibilities across CSD and other service departments within which heritage assets are owned including third parties re: Diocese.
- Consolidate 'types' of non building H&S concerns that could be bundled into a capital bid or funded through CWP as appropriate.
- Secure funding to ensure all quinquennial surveys are programmed.

19. Objective 3 – Heritage Estate assets are removed and or not added to HARR

- Review of the 125 CMP's or 20 year Forward Maintenance Plans for the whole of the Heritage Estate.
- Identify assets at risk of being added to HARR.
- Develop business case for intervention to mitigate assets being added to HARR and support services to bid/secure funding – internal and/or external.
- Establish protocol in place for heritage management and a control mechanism for repair and adaptation to the CoL's heritage assets.

20. Objective 4 - Improve understanding and awareness of CoL Heritage estate and its significance as within the top 5 prominent UK Heritage asset owners

- Encourage City Surveyor inter-departments to enable staff involved with repair and adaptation to heritage assets to undertake heritage asset conservation training.
- Establish periodic cross CoL member and Chief Officer heritage insight days – walkabouts.
- Undertake annual cross CoL officer workshop to share lessons learnt, gaps in knowledge and inform future Heritage Estate management.

Funding and Resourcing

21. The following conservation projects are currently in progress 2021 – 2022/2023

Service Delivery	No of projects	Value
Heritage Estate	36	703,800
Operations	89	4,714,500
Property Projects	1	297,892

The majority of activity is funded via the CWP with only a small number breaching the major projects threshold. Other funding includes the S106 and Crossrail. In addition, Property Projects are delivering the Main House major project at the Freeman's School of circa £22m.

22. A key issue with the CWP prioritisation process has been that the quinquennial surveys required to inform the works, would often not score sufficiently high to be put forward as priority works. The new approach to the CWP approved by Members on 15 September 2020, will now mean that these should get funded.

23. As part of the on-gong review of the service, officers are exploring how the CoL heritage asset management compares to other organisations with comparable portfolios. While this work is still underway, an emerging theme is that the curatorial/expertise role appears very clearly separate to project management. Another is that where project managers have no conservation qualifications, they are proactively

trained in conservation matters. The table below summarises the number of staff who have heritage training existing within the City Surveyors.

Service	Conservation Qualification	Conservation training (short courses etc.)
Heritage Estate	2 (of 2)	Postgraduate
Operations	2	Degree and SPAB*
Property Projects	1	SPAB

*Society of Protection of Ancient Buildings

24. There are also a number of officers in Operations who may not have had training but have considerable conservation experience. However overall, there has been a loss of conservation expertise more broadly across CoL over the last 10 years.

Corporate & Strategic Implications

25. The portfolio density of heritage assets in the Square Mile is comparable to York City, Edinburgh or Bath. These cities utilise their heritage past as a unique selling point to significantly drive visitor engagement supporting the local economy and placemaking. There is a clear opportunity through cross CoL service collaboration for the City's heritage to contribute to the CoL's aspiration to reactivate the Square Mile post Covid and drive visitor numbers.

Conclusion

26. Good progress is being made to provide the service with management tools, increase awareness of the service and also address issues such as access to funding to ensure surveys are undertaken in a timely manner to mitigate H&S risks.
27. Broadening the heritage skillset within the City Surveyors would enable more direct project delivery in support services, allowing the Heritage Estate team more focus on curatorial and strategic asset management.
28. The new data base will be used as a tool to help clarify roles and responsibilities for asset management particularly where multiple services/stakeholders are involved, internal and external, e.g. Churchyards.
29. As noted above, City of London's Heritage Estate is significant on a number of fronts. There is an opportunity to explore promoting it to support the visitor economy.

