

RISE

Retrofit information,
support & expertise

Writing Heritage Statements

Toolkit

October 2024

Funded by:



Department for
Energy Security
& Net Zero

www.riseretrofit.org.uk

Contents

Contents	2
Summary	3
When should you use this toolkit?	3
How should you use this toolkit?	3
Heritage statement template	4

Summary

This toolkit has been prepared to guide local authorities and registered providers of social housing in the process of writing a heritage statement.

A heritage statement is an important document that evaluates the significance of a heritage asset. It assesses the impact of proposed developments on the asset, ensuring that any changes respect and preserve its value for future generations.

The National Planning Policy Framework requires that applicants submit a heritage statement with applications for listed building consent and with planning applications if the development involves or affects a heritage asset. This toolkit provides a template for applicants to use when considering energy efficiency measures that will affect a heritage asset. It does not therefore deal with underground heritage, such as archaeology.

When should you use this toolkit?

The applicant or agent will use this toolkit at the beginning of any project involving a heritage asset to ensure the impact of all proposed developments have been considered.

How should you use this toolkit?

This toolkit template is a guide only. The level of detail required within your respective statement will be dependent on the size and nature of your proposal and the significance of the heritage asset affected.

The heritage statement should be detailed enough to enable the potential impact of proposed works to be clearly understood. For large-scale proposals, significant heritage assets, or sites where the heritage importance has not yet been established, further information may be required in the application process.

Additional supplementary information, providing an understanding on key terms relevant to the writing of heritage statements, can be found in the 'Heritage Statement Key Terms' quick guide on the RISE website.

Heritage statement template

1. Site Address:

The name and full address of the application site.

2. Is the application site:

Tick all that are applicable.

Heritage asset	Yes
A scheduled ancient monument	<input type="checkbox"/>
A listed building (Grade II, Grade II*, or Grade I)	<input type="checkbox"/>
Within a conservation area	<input type="checkbox"/>
A locally listed building or heritage asset	<input type="checkbox"/>
A registered park or garden	<input type="checkbox"/>
A world heritage site	<input type="checkbox"/>
In the setting of or adjacent to one of the above?	<input type="checkbox"/>

3. If you have answered yes to two or more, identify the asset and its heritage designations

For example, detail the grade of the listed building and the name of the conservation area.

4. The significance of the heritage asset(s)

There are four sections to consider the significance of the heritage asset.

- (i) Summarise what makes the heritage asset(s) special?
- Describe each asset; including its age, architectural style, materials, features of note, history and how this contributes to the asset's significance.
 - If the building is scheduled or listed, this may include both internal and external features.
 - Where applicable, identify the contribution of the heritage assets setting to significance.
 - Relevant photographs and archival plans should be attached (Section 8).
 - Provide detail of the any relevant conservation area.

- (ii) Features of historic significance.
- Identify the features of greatest significance to the building. This applies to the building's overall appearance (e.g. single elevation) or specific features (e.g. a fireplace).
 - Identify such features degree of significance: special, neutral, or negative.
 - This list must include all features affected by the proposed development.

Feature	Degree of Significance

- (iii) List of proposed work and its impact on the feature of significance.
- Detail what works you are planning to do to the heritage asset or surrounding area. This can include both internal and external works where relevant.

Feature	Proposed work	Impact (harmful, neutral, beneficial)

- (iv) What research has been conducted to understand the significance of the heritage asset(s) affected?
- Tick all that are applicable.

Historic Environment Record (HER)	<input type="checkbox"/>
Map regression (historic maps)	<input type="checkbox"/>
Record Office	<input type="checkbox"/>
Historic England	<input type="checkbox"/>
Conservation Area Appraisal	<input type="checkbox"/>
Local Planning Authority	<input type="checkbox"/>
Museum or Library	<input type="checkbox"/>
Other (please state)	<input type="checkbox"/>

5. Impact on significance

Considering the tables above, describe with greater detail how the proposal impacts the significance of the heritage asset.

- Describe the impact of the proposal on, for example, architectural detail, historic fabric, plan form, change of relationship with neighbouring buildings.
- What is the impact on views, the character or townscape of the wider area?

- Explain how potential harm has been avoided or mitigated, including consideration of other options.
- Where harm is identified, what level of harm would occur (substantial or less than substantial)?

6. Enhancement and public benefits (where applicable)

Describe how the proposal(s) has been designed to enhance or uncover the significance of the asset.

If harm is identified, will there be any public benefit because of the work? (i.e. where harm has been identified, mention anything that here that may be considered to balance the harm).

7. Other

Use this space to provide any additional information relevant to the proposed development. This could include:

- Photographs of all features affected by proposed work.
- Annotated plans and photographs, with location of each photograph disclosed.

8. Research Evidence

Use this space to provide any additional information or documentation related to prior research. This could include:

- All current and previous research materials relating to the application.
- Details of planning history and consultations.

 www.riseretrofit.org.uk

 RISE – Retrofit information, support & expertise