Heritage setting – a consensus

John Trehy from Terence O'Rourke describes recent developments helping practitioners define the setting of historical assets during environmental impact assessments.

In October 2011, English Heritage (EH) followed Historic Scotland (HS) in publishing much-needed guidance on managing change in the historic environment, in particular on the setting of heritage assets.

Heritage practitioners now have an assessment toolkit at their disposal in the guise of The setting of heritage assets by EH, which, along with EH’s Conservation Principles and HS’s Managing change in the historic environment, outlines:

- a definition of “setting”;
- what currently contributes to a heritage asset’s setting, and
- a staged approach in assessing the impact a proposed change may have on the significance of a heritage asset.

These useful guides came after years of uncertainty on how best to define setting, which resulted in countless public inquiries where town planners, landscape architects and heritage professionals presented their subjective views on what they understood setting to mean.

Finally in 2007, the Institute for Archaeologists called on the profession to come together to provide some clarity on the subject. As a direct result, many key heritage professionals contributed to a report, Setting standards: a review, authored by George Lambrick, former chair of the Council of British Archaeology, which outlined why defining setting was so important and set down a wider call for action.

Ultimately, it was this report which led to HS and now EH to apply a definition of setting and how best to assess potential change to planning policy and guidance.
### Assessment of significance

At Terence O'Rourke to assess the potential effects on heritage of a proposed development we first make an overall assessment of the components, qualities and value of all known sites and features in the study area for inclusion in our environmental statement. This assessment includes above and below ground archaeology and structures, as well as their settings – both individual settings and any that overlap.

The focus is the inherent value and importance of the heritage asset itself, which is clearly separated in the assessment from any public amenity value, particular in those sites that may contribute to tourism, for example.

Put simply, the “setting” is the surroundings in which a heritage asset is experienced.

The setting of any such feature consists of a range of historical or functional relationships with the surrounding area and, frequently, a visual catchment that can vary greatly in scope depending on the nature of the site. The importance of particular views or vistas to the significance of a feature and how it is understood, or appreciated, can vary greatly.

The assessment of value, coupled with national and local legislation, policy statements and best practice, allows a judgement to be made of the importance or significance of the asset.

### The assessment toolkit

The assessment of heritage significance must be rooted in a wider understanding of the historic environment. Before you can assess any potential change, it is crucial to undertake a thorough baseline appraisal and a walkover survey to understand what makes a heritage asset and its present setting significant, or not as the case may be.
Without these initial appraisals you will not be in a position to assess whether proposals will enhance or detract from individuals’ ability to appreciate an asset’s significance. Failure to undertake such work will hinder the development of mitigation strategies in the iterative process of the environmental impact assessment.

Setting is more extensive than curtilage (the land immediately surrounding a building) as it is not a fixed entity and has evolved over the lifetime of the asset. Historic landscape characterisation techniques, as well as a cartographic appraisal are useful for identifying changes in an assets setting through time.

The EH guidance provides a non-exhaustive checklist to assist with determining, which attributes of setting contribute to an asset’s significance. These are grouped into three main categories:

1. Physical surroundings of the heritage asset
2. Experience of the asset
3. An asset’s associative attributes

A final checklist is then provided for practitioners to assess the potential effects of development proposals on heritage assets and their settings. These are grouped into five categories:

1. Location and siting of the development
2. Form and appearance
3. Permanence of the development
4. Consequential effects
5. Other effects

**Transparency for all**

The toolkit provided by the new guidance from EH and HS should lead to robust and comprehensive heritage assessments in [environmental impact assessment](#) (EIA) and will hopefully result in the empowerment of heritage advisors, who are a dwindling resource and, particularly of late, have found themselves having to justify their role in local planning authorities.

These heritage officers play a vital role in heritage protection and conservation across the country and should always be engaged early in the development process to determine the focus of your EIA heritage assessment.
This article was written as a contribution to the EIA Quality Mark’s commitment to improving EIA practice.

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