



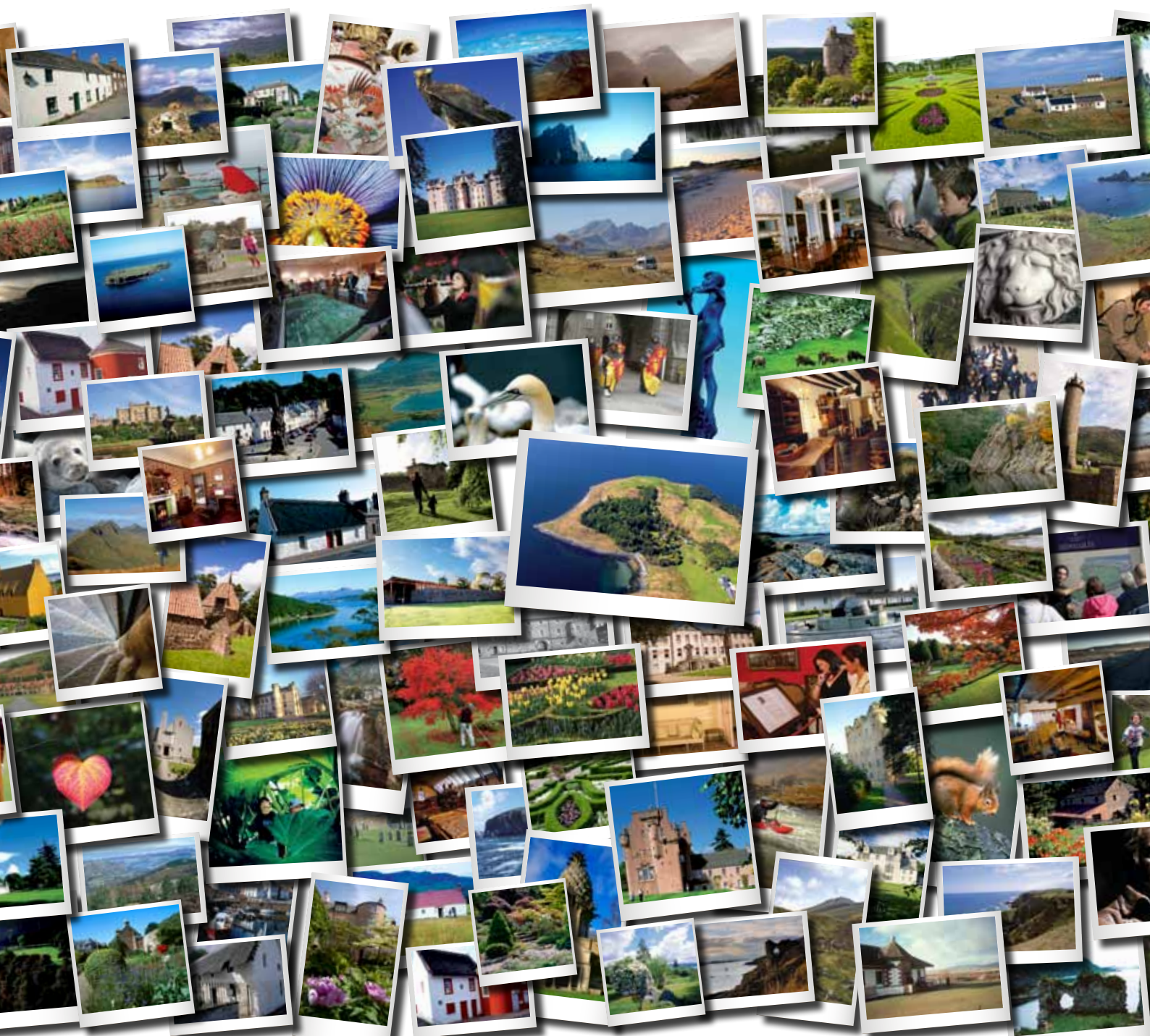
the National Trust  
for Scotland

a place for everyone

## Property Portfolio Review

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# PHASE 1 REPORT: Assessing the Heritage Significance





## Property Portfolio Review

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# PHASE 1 REPORT: Assessing the Heritage Significance

## Introduction and Summary

The Trust's portfolio contains a wide range of properties that vary in their overall significance. Our understanding of the importance and value of each property will depend on our knowledge of it. This understanding will also change over time, as our view of heritage changes. For example, modernist architecture was vilified in the 1970s and 1980s when it was viewed as a destructive force. Today, we are listing some of the best of those buildings. The same applies to our thinking about landscapes, art collections, gardens, etc.

In the analysis of the heritage significance of the National Trust for Scotland's portfolio, no property was found to be without significance. Some were found to be of exceptional quality at an international level; others held a much greater resonance with their local communities and environment. All properties have considerable, latent potential. This potential will be explored in future phases of the review. To be clear, this exercise will not result in the closure or disposal of any of our visited properties.

In relative terms, the portfolio splits into 3 parts – those properties of **exceptional** heritage significance, those of **considerable** significance, and those with **some**. In discussions with an External Validation Panel of conservation experts who know the Trust's properties well, senior members of staff and the Board of Trustees, this relative hierarchy contained no surprises. Inevitably, questions arise as to why one property seemed to rank higher than another. A process of review is therefore in train. Indeed, it will be important to undertake a process of regular review and analysis, if for no other reason than to prevent complacency.

In effect, this Phase 1 report maps out the entire estate, and enables further development on a prioritised basis to advance the strategic plan as it affects each property.

The Trust's *5-Year strategy: Securing the Future of Our Past* articulates our purpose clearly and concisely – to conserve and promote our heritage. A key strategic objective is for our portfolio to reflect our purpose and vision for the future. This heritage significance review starts to deliver this objective and provides the first stage of a phased approach towards completing the review during the Strategy period.

Our Corporate Plan 2012-13, *Sowing the Seeds*, commits us to the completion of the first stage of the Portfolio Review. This report meets this milestone. A wide range of other key objectives in our Plan will advance our understanding of the estate, and enable us to release its full potential.

## Background

This review of the National Trust for Scotland's properties originated from a recommendation in the Governance Review report by the Rt Hon Sir George Reid, called "*Fit for Purpose*".

Recommendation 22 stated that the Review recommends that a Portfolio Review group be established to undertake the significant preparatory work in order to report to the New Board of Trustees in the first half of 2011. The new Board of Trustees should then make the Portfolio Review findings available to the September 2011 AGM.

Trustees presented the process to members at the AGM, and received general support for them.

*Fit for Purpose* reinforced the need for a review of the Trust's estate, already approved by Council in 2002, but importantly created the political imperative for it be undertaken and delivered. In order to achieve this, the task has been broken down into 3 main overlapping phases. The first, which is now completed and forms the substance of this report, has been the assessment of the Heritage Significance of the estate. The second phase, to be concluded by November 2013, will concentrate on developing the cost profile of the estate. The third, underway already, will outline the key priorities for the Trust and its properties, examining the latent opportunities that lie within.

## The Approach:

### The Relative Importance of Apples and Oranges

As already noted, one of the unique attributes of the Trust's estate is the breadth of heritage interests it covers. All aspects, from cultural to natural to moveable heritage can be found. The estate is also very diverse, with building assets ranging from small domestic cottages to large neo-classical mansionhouses; countryside assets from simple viewpoints such as Tighnabruach to iconic landscapes like Torridon and Kintail. Its collections are equally diverse, with folk collections (Angus Folk Museum) to major art ensembles (Fyvie Castle).

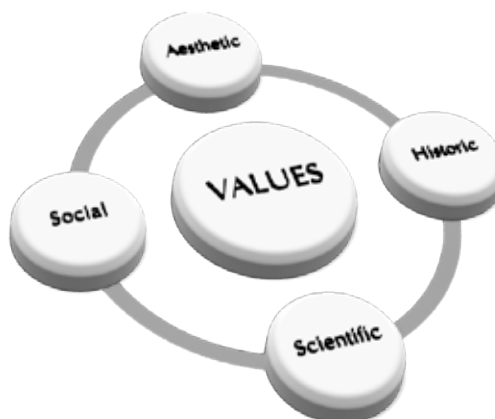
This depth of heritage experience is the single most complicating factor for the Portfolio Review. In order for this Portfolio Review to be truly meaningful, it must be capable of comparing an apple to an orange; it must be able to compare a mountain to a building to a garden, and do so in a manner that is open, transparent and repeatable.

Full details of the approach developed can be found in Appendix Two: Heritage Significance Matrix.

The starting point for this assessment was *The Burra Charter: The Australian ICOMOS Charter for Places of Cultural Significance*. *The Burra Charter* provides guidance for the conservation and management of places of cultural significance. In it, the understanding of the significance of a place is the keystone for the management of heritage sites. The following definitions help provide the framework for the relative assessment of significance across the portfolio.

- *Place* means site, area, land, landscape, building or other work, group of buildings or other works, and may include components, contents, spaces and views.
- *Cultural significance* means aesthetic, historic, scientific, social or spiritual value for past, present or future generations. Cultural significance is embodied in the *place* itself, its *fabric, setting, use, associations, meanings, records, related places* and related *objects*. Places may have a range of values for different individuals or groups.
- *Fabric* means all the physical material of the *place* including components, fixtures, contents, and objects.

The definition of the heritage significance of a place comes from the combination of the aesthetic, historic, scientific and social values of that place. Although we accept that elements used in determining each value are different depending on the specific property that you are looking at, we can create a matrix that captures such differences in a consistent, open and repeatable manner. The interrelationship of this provides us with the heritage value of that site, as shown in diagram to the right.



The ascription of a numeric "score" for each assessment allows the Trust to produce a relative **sift** of heritage significance across the portfolio; a numerical score was given to each merit level. In order to give greater emphasis to exceptional characteristics, a diminishing scale of "scores" was used as thus: Exceptional = 10; Considerable = 5; Some = 2; Little = 1; Nil = 0.

It must be emphasised that this exercise was not intended to produce a score for each individual property, but to allow the Trust to understand the relative merits of the portfolio and to provide a basis for critical appraisal.

## Understanding Significance

The National Trust for Scotland has a long legacy of using the assessment of significance as a keystone in the management of its properties.

The vast majority of NTS properties have appraisals of their significance in place. These have been used as the baseline for discussions and evaluation. As part of the current exercise, our specialist conservation staff has reviewed these, as well as the definitions used for assessment to ensure a consistent and even approach.

Work is underway to publish a series of digests of these Statement of Significance as part of the Review exercise.

## A Snapshot in Time

It must be acknowledged that any property owning organisation that has been in existence for 80 years will reflect the differing priorities over that period and will consequently have a wide ranging portfolio. Similarly, the current assessment of its significance or importance is a snapshot, reflecting the conservation philosophies of our time.

We fully acknowledge this fact. In this context, our values, and our understanding of them, can change over time. Additional information and research can influence how we view a property.

This assessment represents the position at the time of the review. The process is simple and transparent, and therefore easily replicable in future. In addition, the assessment was undertaken during a single concentrated session in October 2011, focussing on all NTS visited properties. The scoring is therefore relative within the context of the Trust's estate at this time.

## Is it an Orange or an Apple?

The Trust's estate is large and diverse. For administrative convenience, and for the purposes of achieving a high level assessment, properties were categorised into one of 5 typologies: Buildings; Gardens; Countryside & Islands; Cultural or Historical; or Other.

The approach to managing the Trust's properties has a bearing on how it has been treated in this assessment. For example, a total of 96 properties were assessed.

- Falls of Glomach and West Affric were considered with Kintail as a single management unit despite being shown in the Trust guide as separate.
- Robert Burns Birthplace Museum (RBBM) and Burns Birthplace Cottage were also assessed as one management unit, whereas the Bachelors' Club and Souter Johnnie's Cottage were considered as separate properties.
- Highland Perthshire properties (The Hermitage & Linn of Tummel) were treated as one and Killiecrankie as another.
- Operational properties (eg Balnain House), those managed by others (e.g. Guardianship Agreements such as Dirleton Castle) and those currently under the auspices of the Asset Management Strategy Group as non-visited properties (e.g. Ramsay Gardens) were not assessed.
- Some properties were not assessed as knowledge was not great enough to do so (e.g. Unst & Yell). This will be addressed through the management planning process.

In order to ensure consistency of approach, the assessment of the portfolio was carried out by Heads of Conservation Service under the auspices of the Director of Conservation Services & Projects. The reason for this was to ensure a "whole estate" perspective. It is inevitable that an element of subjectivity enters into this assessment process but it is also based on in depth expertise. The Heads of Conservation Service represent over 100 years of knowledge and experience at the Trust.

Following the assessment, detailed presentations were given to our regional Group Managers for their comment and input.

## Scrutiny: External Validation Panel and Board Sub-Group

To oversee the process, an External Validation Panel was put in place. The Terms of Reference of this Panel was to advise the Director of Conservation Services & Projects on the suitability of the methodology and to comment on the initial findings of the review. Panel members were drawn from the Trust's former Conservation Committee for the reason that they understood both the Trust and its properties in some detail.

Members of the Panel were:

Professor Jeff Maxwell, Professor Michael Moss, Professor Richard Fawcett, Sir Michael Shaw and Simon Green.

The Trust is grateful for their time, input and assistance. The panel supported the approach taken, and felt that the relative assessment in a concentrated period of time would provide the best results consistent with the recommendations of *Fit for Purpose*. Overall, they concluded that a huge advance had been made but there was much still to do.

Key points raised by the Panel included:

- Approach as a sift, not a score
- Where 2 contrasting properties are of the same score, there is a need to understand issues for better clarity
- Community value needs to be addressed in next phases
- Scope to revisit review findings is important

In addition, the Board of Trustees established a sub-group of members to oversee the assessment. Various presentations were made to the full Board as well as staff to ensure transparency and opportunity for feedback.

## Overview

The following table, collectively titled *Property Portfolio Review Whole Trust Sift* breaks the estate down into three categories of significance. In approximate terms, the Portfolio divides almost equally into thirds, being of **exceptional** significance, **considerable** significance or **some** significance. No property was assessed to be of little or no significance.

In effect, this exercise shows that all Trust properties have merit. Of course, it might be that there are elements within a property that fall below the bar, but the review represents a whole property perspective.

As such, all properties have a role to play in terms of meeting the Trust's core purpose and objectives. The review did not show any property that might be considered suitable for disposal.

To assist in the understanding of the sifting, Appendix One offers a more detailed assessment.

No great surprises have come from this analysis. The properties deemed to have exceptional significance include places such as Culzean, The Hill House and Pollok House together with iconic landscapes such as Ben Lawers, Glencoe and Mar Lodge Estate. Not surprisingly, St Kilda, the UK's only dually inscribed World Heritage Site (for both natural and cultural significance) is included in this category. They tend to be complex with a wide range of elements.

At the other end of the scale, properties with some heritage significance include small and less complex properties such as the Caiy Stone, Boath Doocot and Malleny Garden.

The properties that fell within the category of considerable heritage significance are inevitably a very diverse and interesting group, such as Craigievar Castle, Corrieshalloch Gorge and The Hermitage.

## Next Steps

This review represents a high level, whole estate appraisal of the heritage significance of the National Trust for Scotland's visited properties. It shows that there is a range of properties of varying importance, but that no single property can be seen as having no heritage significance and none that might be considered suitable for disposal. Of course, there might be elements within a single property that have little or no relevance to the heritage of Scotland. It is the intention to capture this information via an ongoing asset management strategy and the property planning processes.

Understanding the heritage significance of the estate is only one component of the Portfolio Review, but an absolutely critical one. The next phases of the Portfolio Review, which will conclude in November 2013, will develop our understanding of the cost of maintaining the estate, in both monetary and resource terms. An assessment of the financial position of each visited property will be established in the context of both the heritage significance and in terms of the visitor experience. This phase is already underway. This will produce a prioritised list of properties/projects for implementation over the Strategy period.

Using information from existing quinquennial building surveys and audits, as well as proposals found in Property Actions Plans, etc (eg new visitor centre, shop improvements) a cost profile for the estate will be developed looking at not only the conservation deficit but the costs of improvement of the visitor experience. Additional resources are being brought in to the Trust in order to make rapid progress and prepare hard costs of conservation activity. This phase is underway.

Phase Three, which is also already underway, will establish clear priorities for activity across the estate, advancing the heritage significance work with a clear focus on financial sustainability and visitor experience at properties. This will determine our priorities for work over the Strategy period and will produce a prioritised list of properties with associated projects for implementation.

Phase One of the Property Portfolio Review – assessing the heritage significance of the Trust's estate has been completed. However, it forms part of a wider, ongoing process that will deliver a clear vision and direction of travel for the Trust through the Corporate Plan, Strategy and beyond.

Terry Levinthal

Director

Conservation Services & Projects

July 2012

## PROPERTY PORTFOLIO REVIEW – Whole Trust sift

### EXCEPTIONAL HERITAGE SIGNIFICANCE PROPERTIES

Bannockburn	Bachelors' Club	Ben Lawers NNR	Ben Lomond w. Bucinch & Ceardach Islands
Brodick Castle, Gardens & Country Park with Goatfell	Broughton House & Garden	Burg	Canna
Crathes Castle, Gardens & Estate	Culloden	Culross	Culzean Castle & Country Park
Falkland Palace, Garden & Old Burgh	Gladstone's Land	Glencoe	Grey Mare's Tail NNR
Haddo House	The Hill House	Iona	Kintail, Morvich, Falls of Glomach & West Affric
Mar Lodge Estate	Newhailes House & Estate	Pollok House	RBBM & Birthplace Museum
Robert Smail's Printing Works	St Kilda WHS	Staffa National Nature Reserve	

### CONSIDERABLE HERITAGE SIGNIFICANCE PROPERTIES

Alloa Tower	Balmacara Estate	Balmerino Abbey	Barrie's Birthplace
Barry Mill	Branklyn Garden	Brodie Castle & Estate	Castle Fraser
Corrieshalloch NNR	Craigievar Castle	David Livingston Centre	Drum Castle, Garden & Estate
Dunkeld	Fair Isle	Fyvie Castle and Garden	Glenfinnan Monument
Hill of Tarvit	Holmwood House	House of Dun	House of the Binns
Inverewe Garden & Estate	Kellie Castle & Garden	Killiecrankie	Leith Hall & Garden
Miller's Cottage & Museum	Mingulay, Berneray & Pabbay	Moirlanich Croft house	Rockcliffe
Souter Johnnies	St Abb's NNR	Strome Castle	The Georgian House
The Hermitage	The Pineapple & Walled Garden	The Tenement House	Threave Estate
Torridon & Shieldaig Island	Weaver's Cottage	Unst & Yell	

### SOME HERITAGE SIGNIFICANCE PROPERTIES

Angus Folk Museum	Arduaine Garden	Beaton's Crofthouse	Blackhill
Boath Doocot & Mote	Bruce's Stone	Callanish Blackhouse	Caig Stone
Camera Obscura	Cameronian's Regimental Monument	Carlyle's Birthplace	Craigower
Crarae Garden	Cunningham Graham Memorial	Dollar Glen	Geilston Garden
Greenbank Garden	Harmony Garden & Priorwood	Hutcheson's Hall	Inveresk Lodge Garden
Linn of Tummel	Malleny Garden	Menstrie Castle	Murray Isles
National Museum of Rural Life	Pitmedden Garden and Folk Museum	Preston Mill & Doocot	St Moden's Well
Venniehill			



## APPENDIX ONE:

### The National Trust for Scotland Property Portfolio Review

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# DETAILED ASSESSMENT

This appendix report offers a more detailed assessment of the relative significance of NTS properties.

The Property Portfolio Review gives a picture of the whole estate from a heritage significance perspective. In order to provide information to help the Trust consider wider priorities for action during the next few years, an understanding of degree of significance across the whole portfolio as well as general types of properties is helpful.

A total of five “bands” of scoring are used as opposed to the three in the main report. However, it should be noted that the top 2 (scores of 40 or between 31-39) when merged form the *Exceptional* heritage significance category; properties in the 21-30 band are the *Considerable* category; and the lower bands (11-20 and 0-10) form the *Some* heritage significance category.

As highlighted in the main report, the allocation of each property to a specific typology was made. This was as much for administrative convenience as it was for added analytical benefit. The Trust accepts that this is a very challenging thing to attempt, as many of our properties contain a wide range of heritage assets – in effect, this is our unique selling point. Thus, Brodick Castle, garden and country park with wider environment of Goatfell included as deemed a “Building”. St Kilda is a countryside property, even though it has a huge cultural heritage significance. Hugh Miller’s Cottage and Museum was designed a cultural property rather than as a building, simply because the story is more about Hugh Miller than the architecture itself. Culross and Dunkeld were put into the “Other” category rather than as a Building because the wider townscape is as important than the individual components.

Finally, it must be emphasised that purpose of attributing a numerical score to a property was to enable a simple means of producing the relative sift or hierarchy of significance.

### **How was a rating achieved?**

A large amount of advance work was undertaken as part of the assessment. Appendix two gives a flavour of complexity of the definitions used to determine value. Detailed information held by the Trust through its property management planning exercise was pulled together, producing a digest of the Statement of Significance for each property. These cover all aspects of heritage at a property. It is intended to publish these as part of this work in the near future.

For example, Glencoe is a countryside property but the wider archaeological and cultural resource is considered alongside the landscape, geological and natural heritage aspects. This provided the evidence for discussion which lead to a heritage value for the 4 elements (aesthetic, historic, scientific and social) being determined. In order to ensure consistent debate, the Heads of Conservation Service met in during an intensive conference lasting a full week.

As the main report acknowledges, it is entirely accepted that this represents a view at a particular point in time, and that further analysis and research could have an influence on the rating.

The following tables outline the properties within the 5 bands.



### Properties with Rating score of 40

Ben Lawers NNR	Brodick Castle, Gardens & Country Park with Goatfell	Canna	Crathes Castle, Gardens & Estate
Culloden	Culross	Culzean Castle & Country Park	Falkland Palace, Garden & Old Burgh
Glencoe	Iona	Mar Lodge Estate	Pollok House
RBBM + Birthplace cottage	St Kilda WHS		

### Properties with Rating Score of 31-39

Bachelor's Club	Bannockburn	Ben Lomond with Bucinch & Ceardach Islands	Broughton House & Garden
Burg	Gladstone's Land	Grey Mare's Tail NNR	Haddo House
Kintail, Falls of Glomach, Morvich & West Affric	Newhailes House and Estate	Robert Smail's Printing Works	Staffa National Nature Reserve
The Hill House			

### Properties with Rating Score of 21-30

Alloa Tower	Balmacara Estate	Balmerino Abbey	Barry Water Mill
Branklyn Garden	Brodie Castle & Estate	Castle Fraser	Corrieshalloch NNR
Craigievar Castle	David Livingston Centre	Drum Castle, Garden & Estate	Dunkeld
Fair Isle	Fyvie Castle and Garden	Glenfinnan Monument	Hill of Tarvit
Holmwood House	House of the Binns	House of Dun	Inverewe Garden & Estate
J M Barrie's Birthplace	Kellie Castle & Garden	Killiecrankie	Leith Hall & Garden
Hugh Miller's Cottage	Mingulay, Berneray & Pabbay	Moirlanich Croft house	Rockcliffe
Souter Johnnie's Cottage	St Abb's NNR	Strome Castle (as part of Balmacara)	The Georgian House
The Hermitage	The Pineapple & Walled Garden	The Tenement House	Threave Estate
Torridon & Shieldaig Island	Weaver's Cottage	Unst & Yell	

### Properties with Rating Score of 11-20

Angus Folk Museum	Arduaine Garden	Blackhill	Boath Doocot & Mote
Thomas Carlyle's Birthplace	Crarae Garden	Cunninghame Graham Memorial	Dollar Glen
Geilston Garden	Greenbank Garden	Harmony & Priorwood Garden	Hutcheson's Hall
Linn of Tummel	Malleny Garden	Murray Isles	National Museum of Rural Life
Pitmedden Garden and Folk Museum	Preston Mill & Doocot		

### Properties with Rating score of 10 or less

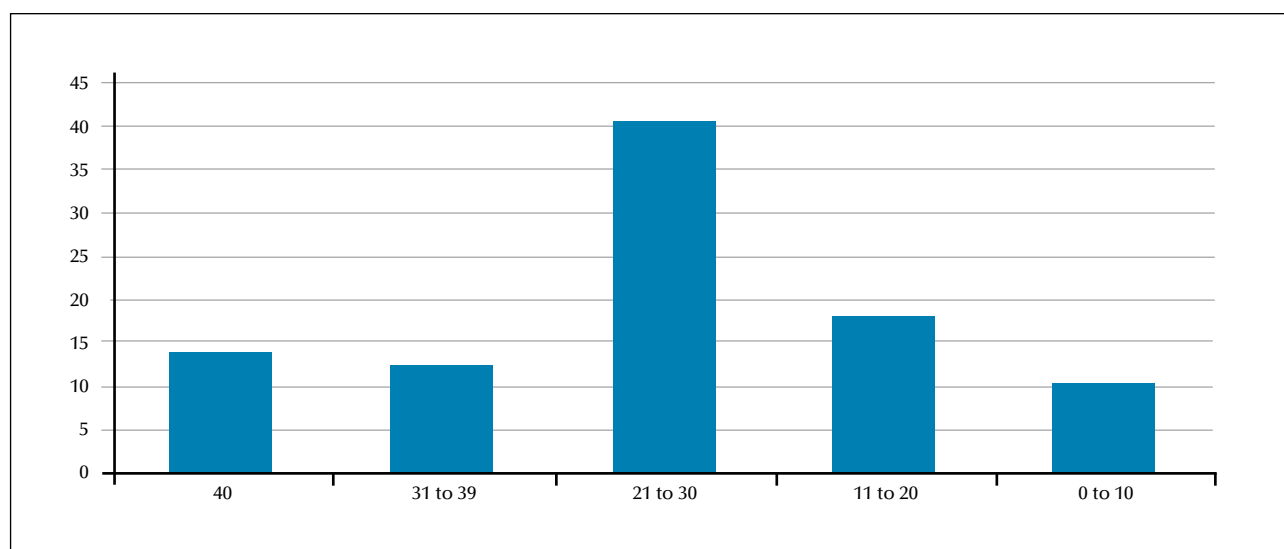
Beaton's Croft house	Bruce's Stone	Caiy Stone	Callanish Blackhouse
Camera Obscura	Cameronian's Regimental Monument	Craigower	Inveresk Lodge Garden
Menstrie Castle	St Moden's Well	Venniehill	

## a.WHOLE PORTFOLIO – high level assessment of relative significance

Table 1: Ranking of Heritage Significance

Score banding (properties scoring between x and y)	Number	Percentage
40	14	15%
31-39	13	14%
21-30	39	41%
11-20	18	19%
0-10	11	12%
	95	101% (Not 100% due to rounding)

Chart 1: Number of Properties in Scoring Band



### Discussion

There is a wide spread of scores across the Portfolio. No property received a score of “0”. The largest portion of the portfolio sits within the middle band. The number of properties at the top and lower end are about equal.

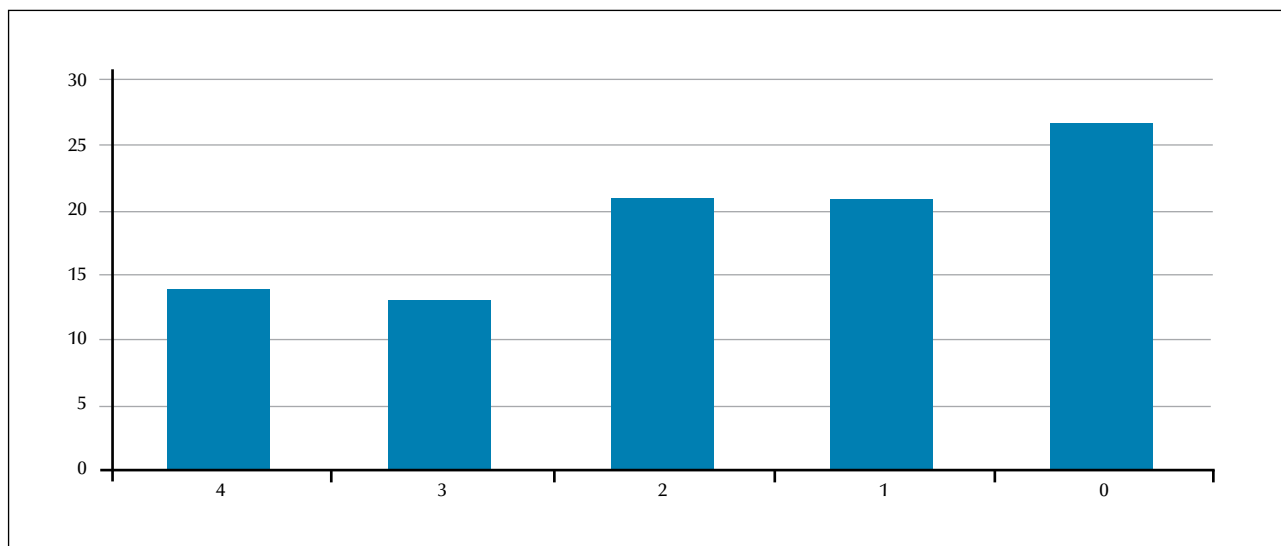
Thus, the NTS portfolio can be roughly divided into thirds in terms of its relative heritage significance, and these can be largely termed as having exceptional, considerable or some heritage significance. No property had a value of none or negative, thereby implying that they all could be seen as playing a part in the Trust’s portfolio.

## b.WHOLE PORTFOLIO – properties with Exceptional value rating

Table 2: Properties with exceptional rating

Number of 'Exceptional' ratings (maximum 4)	Number of properties	Percentage
4	14	15%
3	13	14%
2	21	22%
1	21	22%
0	26	27%
Total	95	100%

Chart 2: Number of Properties with 'Exceptional' score



### Discussion

This section analyses properties from an “exceptional” rating score perspective. The reason for this is the assumption that the Trust, with its particular statutory objectives, will be seen by many to be the holder of some of Scotland’s most important heritage. Therefore, the NTS portfolio might be expected to have a greater portion of outstanding values.

It must be appreciated at this stage that this assessment is relative – ie it is in the context of the NTS portfolio only.

Whilst not showing a linear progression, is clear that the majority of the Trust’s properties have an element of “exceptional” quality to them, amounting to 68.7%.

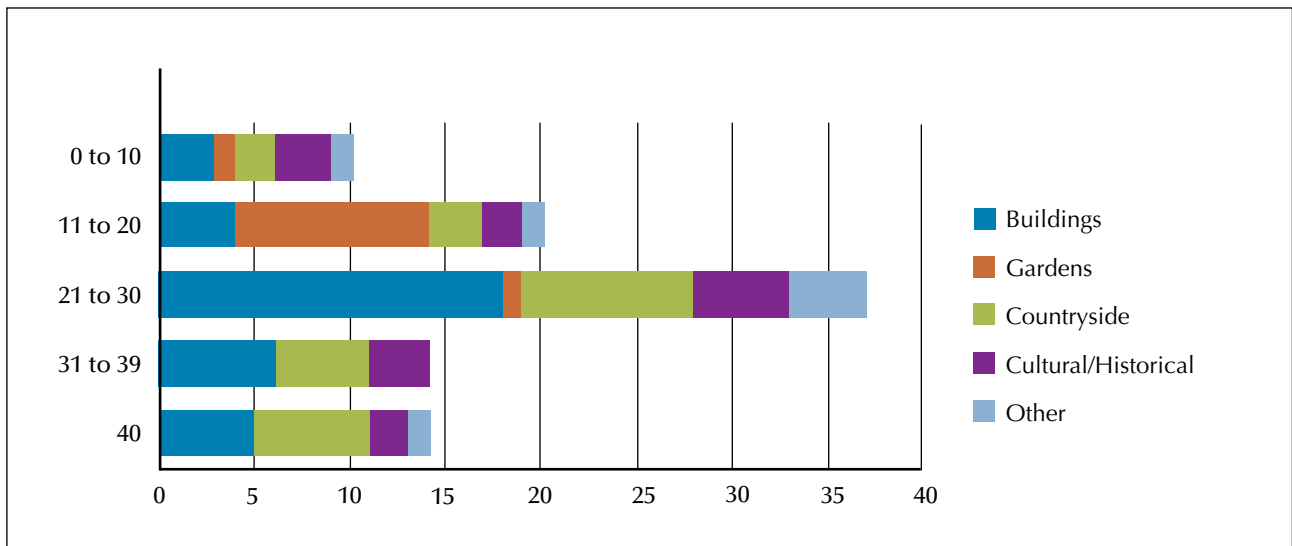
This does not mean that the rest (31.3%) do not have any significance – far from it. A “considerable” value has been given to over half of this total in at least one area.

### c.PORTFOLIO REVIEW by TYPOLOGY ASSESSMENT

Table 3: Assessment by Score bands

Score Banding	Buildings	Gardens & Designed Landscapes	Countryside & Islands	Cultural & Historical	Other	Totals
40	5	0	6	2	1	14
31-39	6	0	5	3	0	14
21-30	18	1	9	5	4	37
11-20	4	10	3	2	1	20
0-10	3	1	2	3	1	10
Totals	36	12	25	15	7	95

Chart 3: Assessment by type by scoring bands



### Discussion

The review process considered the heritage significance across the entire portfolio, but also within typological areas as well. Table 3 and Chart 3 shows the distribution across 5 key, high level types of properties. Again, it must be understood that many of our properties are diverse in their content, and the Trust’s unique selling point is our integrated approach to heritage and conservation management.

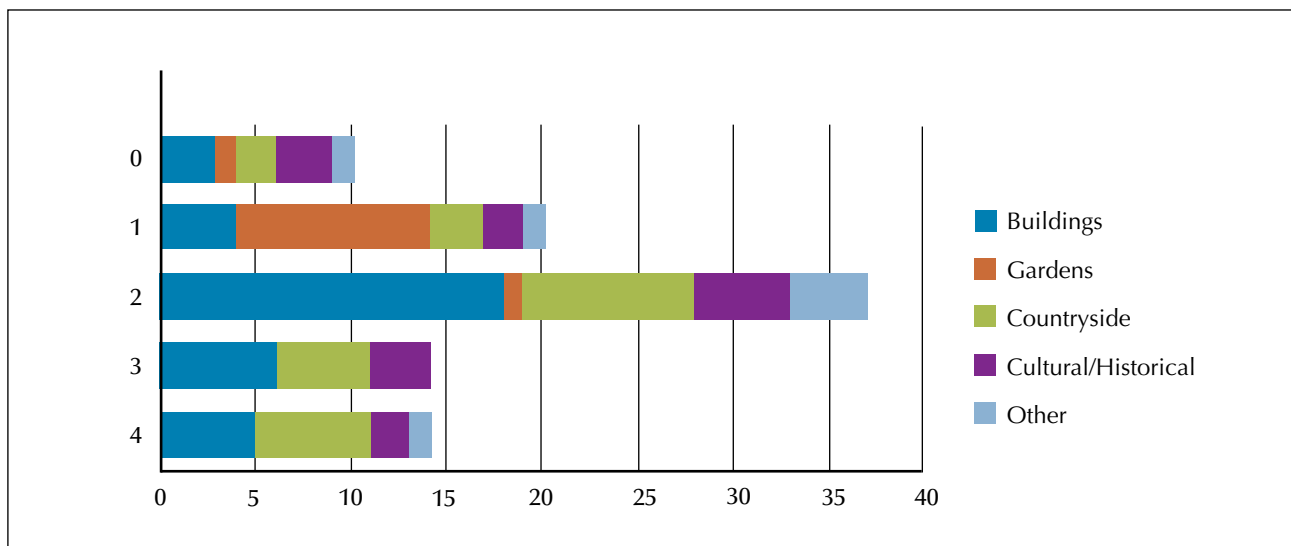
One key feature that comes out of this is the omission of gardens from the top bandings. However, this does not mean that the Trust’s gardens are not significant. Some received “exceptional” ratings for key values (eg Inverewe) and “considerable” ratings were seen in a large number. Equally, a large number of our most important gardens and designed landscapes were viewed as a Building (eg Crathes and Culzean) for the purposes of this exercise.

## d. PORTFOLIO REVIEW by TYPOLOGY ASSESSMENT

Table 4: Properties with exceptional value rating

Number of 'Exceptional' ratings (maximum 4)	Buildings	Gardens & Designed Landscapes	Countryside & Islands	Cultural & Historical	Other	Totals
4	5	0	6	2	1	14
3	6	0	5	3	0	14
2	18	1	9	5	4	37
1	4	10	3	2	1	20
0	3	1	2	3	1	10
Totals	36	12	25	15	7	95

Chart 4: Assessment of 'exceptional' rating by type



## Discussion

As with the Table 3/Chart 3, the omission of gardens from the higher end of significance is interesting. However, a number of gardens have received "exceptional" grades.

A comparison between Chart 3 & 4 is interesting, in that the buildings and countryside typologies comes across in a more even distribution than when assessed against overall bands.

## e.PORTFOLIO REVIEW – distribution of top and lower bands

Chart 5: Number of properties scoring 40 by Region



### Discussion

These properties represent the most valuable heritage resources owned by NTS. Large estate properties figure as do some of our most iconic countryside properties. The geographic spread of these properties is fairly even across the whole of the Trust.

Chart 6: Number of properties scoring 10 or less by Region



### Discussion

In general terms, these are small, uncomplicated properties and do not require a considerable amount of resources to run them. Of interest is the Countryside and Islands South region in this picture. This may be because many of these properties are historic acquisitions, and there may have been a dominance of these in this area although it is difficult to infer.

## APPENDIX TWO:

### The National Trust for Scotland Property Portfolio Review

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# HERITAGE SIGNIFICANCE MATRIX

## Definitions and identifiers

### HERITAGE SIGNIFICANCE MATRIX

#### **The Relative importance of Apples and Oranges: The Approach to a comparative analysis**

One of the unique attributes of the Trust's estate is the breadth of heritage interests it covers. All aspects, from cultural to natural to moveable heritage can be found. The estate is also very diverse, with building assets ranging from small domestic cottages to large neo-classical mansionhouses; countryside assets from simple viewpoints such as Tighnabruaich to iconic landscapes like Torridon and Kintail. Its collections are equally diverse, with folk collections (Angus Folk Museum) to major art ensembles (Fyvie Castle).

This depth of heritage experience is the single most complicating factor for the portfolio review.

For the review to be truly useful, it must be able to compare a mountain to a building to a garden, and do so in a manner that is open, transparent and repeatable. Indeed, this latter quality is essential, as our perceptions of heritage and its value to ourselves can, and does change over time.

It is for these reasons that the Trust choose to not develop its own process for assessment but to seek a recognised and tested methodology, which is endorsed generally by the heritage sector. This can be found within *The Burra Charter*, and its relations *The Australian Natural Heritage Charter* and *The Guide for Assessing the Significance of Cultural Heritage Objects & Collections*.

*The Burra Charter: The Australian ICOMOS Charter for Places of Cultural Significance* was developed by the Australian ICOMOS<sup>1</sup> chapter in 1979. The Charter sets a standard of practice for those who provide advice, make decisions about, or undertake works to places of cultural significance, including owners, managers and custodians. It has been largely adopted as the main methodology for assessing heritage significance, and its approach underpins the Trust's own Conservation Principles.

For the purposes of the review, the following definitions help provide the framework for the relative assessment of significance across the portfolio.

- *Place* means site, area, land, landscape, building or other work, group of buildings or other works, and may include components, contents, spaces and views.
- *Cultural significance* means aesthetic, historic, scientific, social or spiritual value for past, present or future generations. Cultural significance is embodied in the place itself, its *fabric, setting, use, associations, meanings, records, related places* and *related objects*. Places may have a range of values for different individuals or groups.
- *Fabric* means all the physical material of the place including components, fixtures, contents, and objects.

<sup>1</sup> ICOMOS stands for International Convention on Monuments and Sites. It is a technical management agency of the United Nations Environmental, Social, and Cultural Organisation (UNESCO).

The Burra Charter was largely prepared for the purposes of understanding man-made heritage – ie the archaeological and architectural heritage. The application of these definitions, however, when applied to other areas of heritage interest, such as natural heritage can get a bit stretched. To address this, *The Australian Natural Heritage Charter for the Conservation of Places of Natural Heritage Significance*<sup>2</sup> was created, and it uses the same philosophical approach to capture natural processes.

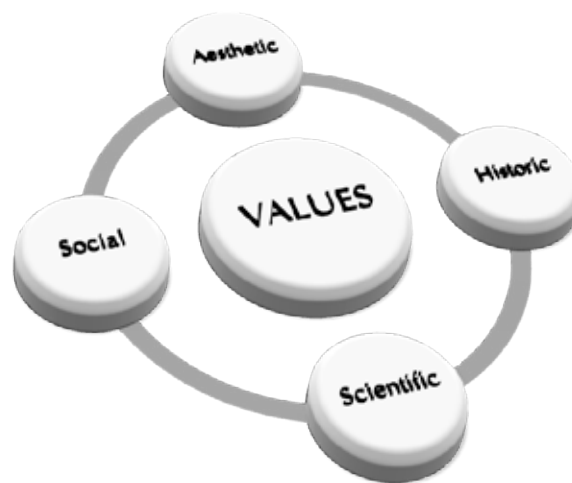
As with The Burra Charter, it incorporates a range of values, from existence value to socially-based values. The fundamental concept of natural heritage, which most clearly differentiates it from cultural heritage, is that of natural and dynamic ecological processes, earth processes and evolutionary processes, and the ability of ecosystems to be self-perpetuating.

In 2001, the Australian Heritage Collections Council published *The Guide for Assessing the Significance of Cultural Heritage Objects & Collections*<sup>3</sup>. Not surprisingly, the definition follows directly from the Burra Charter – “significance means the historic, aesthetic, scientific and social values that an object or collection has for past, present and future generations.” Additional criteria were added to the assessment process including five comparative modifiers to assist in understanding the degree of significance. These are: provenance; representativeness; rarity; condition, completeness or intactness and integrity; and interpretive potential.

The poor cousin from the Trust’s perspective was gardens and designed landscapes, although some of the criteria for the assessment of significance can found in the above Charters. However, an international standard for the consideration of the heritage merit of gardens can be found in *The Florence Charter: Preservation of historic gardens* (ICOMOS, 1981). The essence of this Charter is that “a historic garden is an architectural and horticultural composition of interest to the public from the historical or artistic point of view”. As such, it is to be considered as a monument. It takes its cue from *The Venice Charter for the Conservation and Restoration of Monuments and Sites* (1964) but has never been updated to reflect current thinking. In addition, the criteria set out in the Scottish Historic Environment Policy (Historic Scotland, 2009 and 2011) for designation into the formal Inventory of Gardens and Designed Landscapes provides a range of significance criteria that can be used. These were translated into a set of criteria that mirrored the Burra Charter’s definitions.

## Methodology

The methodology defines the heritage significance of a place as the combination of the aesthetic, historic, scientific and social values of that place. These four values can capture widely differing technical elements of a range of heritage assets. By using this approach, it is possible to compare an apple to an orange, or in our case, a mountain to a building to a garden. Although we accept that elements used in determining each value are different, we can create a matrix that captures such differences in a similar manner. Importantly, it is possible to capture a range of information so that the various elements at a single property can be brought into the assessment to produce a unified view of the heritage significance of any given property. In this way, and through an associated weighted scoring system, it is possible to produce a sift of relative merit.



<sup>2</sup> The development and review of the Charter was conducted by a national steering committee made up of representatives of the Australian Committee for IUCN (World Conservation Union), the Australian Heritage Commission, Environment Australia, the Australian Local Government Association, the University of Sydney, the University of New South Wales, the Environment Institute of Australia, the Indigenous community and environmental consultants. It was adopted in December 1996.

<sup>3</sup> It followed the establishment of a National Conservation and Preservation Policy and Strategy by the Australian Governments.



The Burra Charter uses a scale of 5 levels of merit for the purposes of evaluation. These are: exceptional, considerable, some, little and none/negative. Thus, each value (eg Aesthetic) can be given a merit grade (eg Considerable). In order to allow the Trust to produce a relative sift of heritage significance across the portfolio, a numerical score was given to each merit level. In order to give greater emphasis to exceptional characteristics, a diminishing scale of “scores” was used as thus: Exceptional = 10; Considerable = 5; Some = 2; Little = 1; Nil = 0.

Thus, a simple matrix can be produced that allows a comparative picture of the relative importance of differing properties to be prepared. The following table shows this graphically :

#### Property Table: Heritage Value v. Significance

	Exceptional (10)	Considerable (5)	Some (2)	Little (1)	None/Negative(0)
Aesthetic*					
Historic*					
Scientific*					
Social*					
TOTAL					

Whilst a numeric score is produced, it is really a benchmark which allows a relative comparison to other properties to take place. Overall, a “map” of the heritage significance of the NTS estate is produced.

This is itself is only the start of the process of understanding the needs and requirements of a property.

### Definitions for Heritage Values

The following table outlines the definitions and criteria that were used during the period of evaluation. In order to be explicit about the understanding of a value such as “aesthetic” given the wide range of assets held by the Trust, the separation of the sector (built, natural, gardens or moveable) with its own specific set of definitions or modifiers assists in the transparency of the analysis.

Heritage value	Sector	Definition
<b>Aesthetic value</b>	Built	Aesthetic value includes aspects of sensory perception for which criteria can and should be stated. Such criteria may include consideration of the form, scale, colour, texture and material of the fabric; the smells and sounds associated with the place and its use. Condition or “state of being”. Designations or formal recognition of value in statute or national policy.
	Natural	Natural range (Diversity) of species, habitats, landscapes or geological features (bedrock, landforms, soils) and natural processes. Rarity of above, expressed as frequency of occurrence (no. of locations within Scotland, UK or World), or % of world population/global resource. Representativeness in a local, national or global context. Fragility/degree of threat. Likelihood of damage or alteration. Designations or formal recognition of value in statute or national policy.
	Gardens	FLORENCE CHARTER - Living dynamic works of art that are ever-changing; Structural and decorative features; association with particular environment (building, rural, urban, etc); “work of art”; Architectural and horticultural composition of interest; clear identity with particular period of garden development (SHEP). Condition or “state of being”. Designations or formal recognition of value in statute or national policy.

Heritage value	Sector	Definition
	Moveable Collections	<p>Interior as a collection in situ; “as lived in”; integrity with the whole. Condition or “state of being”. representativeness; craftsmanship, style, technical excellence, beauty, demonstration of skill and quality of design and execution.</p> <p>NOTE - It might include innovative or traditional objects from Indigenous or folk cultures or high art. Aesthetically significant objects may be unique or mass produced.</p> <p>Designations or formal recognition of value in statute or national policy.</p>
<b>Historic value</b>	Built	<p>Historic value encompasses the history of aesthetics, science and society, and therefore to a large extent underlies all of the terms set out in this section. A place may have historic value because it has influenced, or has been influenced by, an historic figure, event, phase or activity. It may also have historic value as the site of an important event. For any given place the significance will be greater where evidence of the association or event survives in situ, or where the settings are substantially intact, than where it has been changed or evidence does not survive. However, some events or associations may be so important that the place retains significance regardless of subsequent treatment.</p>
	Natural	<p><b>Natural integrity</b> or the degree to which a landscape or ecosystem retains its natural biodiversity and geodiversity and other natural processes and characteristics. Lack of introduced species.</p> <p>Wildness – lack of detractors, human modification. Feeling of wildness. Remoteness</p> <p>Size and scale of semi-natural landscapes or ecosystems.</p> <p>Evidence of past environments or human use – archaeological remains, species assemblages, soil deposits, etc.</p> <p>Geo-diversity and processes; link to founding discoveries and key people;</p> <p>Biodiversity: Link to historical discoveries + key people. Type specimens and localities</p>
	Gardens	<p>A site has <b>outstanding</b> historic value if:</p> <ul style="list-style-type: none"> <li>(i) there is good contemporary documentary and physical evidence of its development;</li> <li>(ii) it is, as a whole, an outstanding representative of a particular period of the historic development of gardens and designed landscapes;</li> <li>(iii) it has one or more components which provide an outstanding example of a particular period or style;</li> <li>(iv) it was a trend setting landscape at some stage in its history;</li> <li>(v) it has physical evidence of a particularly early form of designed landscape;</li> <li>(vi) it has strong associations with an important historic personality.</li> </ul> <p>(NOTE – From SHEP July 2009)</p>
	Moveable Collections	<p>Longevity of collections in historic interior; provenance; rarity</p>

Heritage value	Sector	Definition
<b>Scientific value</b>	Built	The scientific or research value of a place will depend on the importance of the data involved, on its rarity, quality or representativeness, and on the degree to which the place may contribute further substantial information. Potential for new scientific research. Condition or “state of being”.
	Natural	Potential for discovery of additional species or natural features (consisting of physical, geological or biological formations or groups of such formations) - unexplored potential; Potential for scientific research on natural processes or features. Indicators of environmental change and environmental change research. Natural range (diversity) of geological (bedrock), geomorphological (landform) and soil features, assemblages, systems and processes. Geodiversity includes evidence of the past life, ecosystems and environments in the history of the earth as well as a range of atmospheric, hydrological and biological processes currently acting on rocks, landforms and soils.
	Gardens	<b>outstanding</b> scientific collection of plants, shrubs or trees which are in good condition, documented, propagated; demonstrates important pioneering steps in silviculture; contains habitats which are officially designated as, for example, Sites of Special Scientific Interest (SHEP). Potential for new scientific research. Condition or “state of being”.
	Moveable Collections	Potential for new scientific research. Condition or “state of being”. An object may be of <b>scientific value</b> if it demonstrates the documented distribution, range, variation or habitat of a taxon or taxonomic category, such as species or genus.
<b>Social value</b>	Built	Social value embraces the qualities for which a place has become a focus of spiritual, political, national or other cultural sentiment to a majority or minority group.
	Natural	Access and enjoyment to natural features and landscapes (to include number of visitors and degree of enjoyment) Condition or “state of being”. Sense of place; setting within wider landscape; Crofting. Life-support value; ecosystem services; regulating services (e.g. flood management); climate change mitigation, especially carbon sequestration and storage. Cultural attachment and sense of belonging; landscape defining social activity or order (past, present, future); Existence value – value placed on natural features by people who do not necessarily visit – remote appreciation; iconic species or landscapes.
	Gardens	significant trendsetter for later works;
	Moveable Collections	Reason of existence; interest in collecting as a social activity; “reflectiveness” and visitor interest. <b>community esteem</b> - demonstrated by social, spiritual, or cultural expressions that provide evidence of a community’s strong affection for an object or collection, and of how it contributes to that community’s identity and social cohesion.

# NOTES ON THE DEVELOPMENT OF THE HERITAGE MATRIX

## The Burra Charter (1979; updated 1999)

The Burra Charter is widely accepted as the baseline methodology for assessing heritage significance of immovable objects. It was developed from an earlier benchmark assessment known as the Venice Charter. In practice, its specific application applies best to structures and places – either architectural or archaeological. It fully accepts that the assessment of significance is a snapshot at any given time, and as knowledge grows, the significances can change. It has been adopted by the International Council on Monuments and Sites (ICOMOS) as best practice. ICOMOS is a technical advisory agency to UNESCO.

## The Australian Natural Heritage Charter (1996)

As an extension of the work undertaken by the ICOMOS Australia on the Burra Charter and its revision, the national government sought to extend the principles of informed decision-making via the understanding of significance, and developed a similar approach to the natural heritage. A number of key principles for the purposes of the NTS portfolio review include:

- Article 2** The basis for *conservation* is the assessment of the *natural significance* of a *place*, usually presented as a statement of significance.
- Article 3** The aim of *conservation* is to retain, *restore* or *reinstate* the *natural significance* of a place.
- Article 4** A self-sustaining condition is preferable to an outcome that requires a high level of ongoing management intervention.

**Natural heritage** means:

- natural features consisting of physical and biological formations or groups of such formations, which demonstrate *natural significance*
- geological and physiographical formations and precisely delineated areas that constitute the habitat of *indigenous species* of animals and plants, which demonstrate *natural significance*, and/or
- natural sites or precisely-delineated natural areas which demonstrate *natural significance* from the point of view of science, *conservation* or natural beauty.

**Natural significance** means the importance of *ecosystems*, *biodiversity* and *geodiversity* for their existence value or for present or future generations, in terms of their scientific, social, aesthetic and life-support value.

## A Guide to the Significance of Cultural Heritage Objects and Collections (2001)

Just as the principles of the Burra Charter were applied to the natural heritage, the same was done for material moveable collections. The principles remain largely the same, but in practice it is a much more difficult task to apply significance to an object or group of objects. When the key values are applied – aesthetic, historic, scientific and social – interpretation can vary enormously.

For example, an object or collection may have **research significance** if it has major potential for further scientific examination or study. An object may be of **scientific value** if it demonstrates the documented distribution, range, variation or habitat of a taxon or taxonomic category, such as species or genus. Archaeological artefacts and collections may have research significance if they are provenanced, and were recovered from a documented context, and if they represent aspects of history that are not well reflected in other sources. This criterion tends to apply chiefly to biological, geological and archaeological material, but may also apply to documentary collections. All biological collections of wild plants or animals, providing they have some data about their provenance, are of some real or potential scientific value, since they contribute to an overall picture of the species, an ecological community, or area biota of a particular locality. Note that objects significant to the history of science or technology should be assessed under the criterion of historical significance, not scientific significance.

Key aspects for the portfolio review include:

- provenance; representativeness; rarity; condition, completeness or intactness and integrity; and interpretive potential.
- craftsmanship, style, technical excellence, beauty, demonstration of skill and quality of design and execution. It might include innovative or traditional objects from Indigenous or folk cultures or high art. Aesthetically significant objects may be unique or mass produced.
- **community esteem** - demonstrated by social, spiritual, or cultural expressions that provide evidence of a community's strong affection for an object or collection, and of how it contributes to that community's identity and social cohesion.

## Gardens & Designed Landscapes

There are no coherent national or international standards for the evaluation of a heritage garden or designed landscape. The Garden's community have not yet taken the full steps towards this, so we were confronted with the task of either finding a set of existing standards, or making our own. The starting point for the Review was to take recognised standards and apply them, so the former was the preferred strategy. Indeed, we did find a useful set of guidance in the Florence Charter (preservation of historic gardens, 1981). The essence of this Charter is that "a historic garden is an architectural and horticultural composition of interest to the public from the historical or artistic point of view". As such, it is to be considered as a monument. It takes its cue from the Venice Charter but has never been updated to reflect current thinking.

For the purposes of the Portfolio Review, the now superseded *Scottish Historic Environment Policy no.3 Gardens and Designed Landscapes* (it has been subsumed into a single, more general policy). In this, gardens and designed landscapes are defined as grounds that are consciously laid out for artistic effect and most often contain architectural features, trees, shrubs, flowers, water features, lawns, woodland and parkland

ANNEX 4 of integrated SHEP (July 2009) suggests that sites on the Inventory of Gardens and Designed Landscapes should be assessed on a range of criteria. These were felt to provide a good basis for comparative analysis. These assessment criteria are:

1.
  - a. value as individual works of art in their own right;
  - b. historic value;
  - c. horticultural, arboricultural or silvicultural value;
  - d. architectural value;
  - e. scenic value;
  - f. nature conservation value;
  - g. archaeological value.
2. Their current condition and integrity are also important considerations.
3. The relative importance of a site depends on the extent to which each value is expressed. A site may have outstanding value, high value, some value, little value or no value.
  - a. A site has **outstanding** value as a work of art if, in its present form:
    - (i) it was considered to have such value in contemporary views etc. at one or more stages of its history or, if it became a significant trendsetter for later works;
    - (ii) it is an important example of the work of a particular designer or designers. It might have rarity value if the designer executed few schemes or it might be particularly representative, intact or a key work.
  - b. A site has **outstanding** historic value if:
    - (i) there is good contemporary documentary and physical evidence of its development;
    - (ii) it is, as a whole, an outstanding representative of a particular period of the historic development of gardens and designed landscapes;
    - (iii) it has one or more components which provide an outstanding example of a particular period or style;
    - (iv) it was a trend setting landscape at some stage in its history;
    - (v) it has physical evidence of a particularly early form of designed landscape;
    - (vi) it has strong associations with an important historic personality.
  - c. A site has **outstanding** horticultural, arboricultural or silvicultural value if:
    - (i) it has an outstanding collection of plants shrubs or trees with a wide range of species, unusual species or rarities, which are in good condition and being renewed;
    - (ii) it has an outstanding scientific collection of plants, shrubs or trees which are in good condition, documented, propagated and made available to others;
    - (iii) it has an important place in the history of horticulture or arboriculture;
    - (iv) it demonstrates important pioneering steps in silviculture.

d. A site has **outstanding** architectural value if:

- (i) it provides the setting for a building or buildings of outstanding architectural or historic interest; it contains architectural features or ornamentation which, together, are of exceptional interest.

e. A site has **outstanding** scenic value if:

- (ii) it makes a major contribution to the quality of the surrounding landscape by virtue of its size, location or nature or, because it is particularly prominent because of rarity and contrast with the surrounding landscape.

f. A site has **outstanding** nature conservation value if:

- (i) it contains habitats which are officially designated as, for example, Sites of Special Scientific Interest.

g. A site has **outstanding** archaeological value if:

- (i) it provides the setting for or contains scheduled monuments.

The condition of the site today and its overall integrity are important elements of the selection process. They become significant issues when the condition of site, and therefore its integrity, is such that its interest has become devalued to the degree that it cannot be regarded as of national importance in today's terms.