

**Norwich City Council**  
**SCRUTINY COMMITTEE**

## **Item 3**

**REPORT for meeting to be held on 8 April 2014**

### **Call-in of the cabinet decision to approve the Heritage investment strategy**

**Summary:**

This report informs members of the call – in of the cabinet’s decision to approve the *Heritage investment strategy* and provides a procedure of how to deal with the call-in at the meeting. The papers considered by cabinet on 26 March 2014 can be found at appendix 1. The relevant minute is in the body of the report.

**Recommendation:**

To proceed with the call-in as suggested in the proposed procedure and in doing so decide whether or not to:

- a) endorse the cabinet decision, which will then be implemented
- or
- b) refer the matter back for reconsideration by cabinet.

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### **The Call-in and members making the call-in**

1. The decision to approve the *Heritage investment strategy* was made by cabinet on 26 March 2014.
2. The call-in is made by Councillors Lucy Galvin, James Wright, Denise Carlo, Andrew Boswell and Lesley Grahame.
3. The call-in documentation can be found at appendix 2.

### **Cabinet minute**

#### **4. HERITAGE INVESTMENT STRATEGY**

Councillor Waters, deputy leader of the council and portfolio holder for resources, presented the report.

The executive head of communications, customers and culture clarified that the city council owns a small part of the Wensum Lodge complex – the music house – which is leased to the county council.

**RESOLVED** to approve the *Heritage investment strategy*

### **Procedure for dealing with call-in items at committee**

5. Please refer to the procedure for called in items which are attached at appendix 3.

**Report to** Cabinet  
26 March 2014  
**Report of** Deputy chief executive (operations)  
**Subject** Heritage investment strategy

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## **Purpose**

To consider the *Heritage investment strategy* which will help inform future management decisions on heritage assets which are owned by the city council.

## **Recommendation:**

To approve the *Heritage investment strategy*.

## **Corporate and service priorities:**

The report helps to meet the corporate priority Character and culture

## **Financial Implications:**

The approaches outlined in the strategy will have financial implications but decisions on the management of assets will need to be taken on a case by case basis under existing procedures and within available budgets. Having a published *Heritage investment strategy* should prove beneficial to potential bids to secure external investment in city owned heritage assets

## **Ward/s:** All

**Cabinet members:** Councillor Waters - Deputy leader and resources and Council Stonard - Environment, development and transport.

## **Contact officers**

Graham Nelson, head of planning services	01603 212530
Mark Wilson, conservation and design officer	01603 212200

## **Background documents**

None

# Report

## Background

1. The *Heritage investment strategy* has been prepared in order to assist with the effective management of the significant heritage assets that the council owns. With increased constraints on local authorities it is important to fully understand the extent of assets that they own and their significance.
2. It will enhance the approach to decision making on the management, maintenance and ownership of the council's heritage assets. The ability to secure grant funding will also be enhanced which in turn will gain the support of English Heritage and the Heritage Lottery Fund for future applications.
3. The project was conceived in March 2013 and the full strategy has undergone a rigorous consultation and drafting process over the ensuing 12 months. It sets out a number of target timescales for the production of further policies and procedures. By March 2015 there should be full initial implementation and organisation of the strategy. By March 2018 longer term actions should be complete such as thorough condition survey in place for every listed building and scheduled monument. Also a review of the effectiveness of the strategy will be undertaken.
4. The draft strategy is appended to the report as appendix 1. The foreword still needs to be completed, this and further minor changes required to prior to publication will be made by the deputy chief executive (operations) in consultation with the portfolio holder. For brevity the lengthy appendices to the strategy are not included however these are accessible on the council's website. (<http://www.norwich.gov.uk/Planning/pages/HistoricBuildings.aspx>).

## Consultation and engagement with stakeholders

5. Two rounds of consultation with relevant councillors, the Norwich Society, Norwich Historic Churches Trust, Heart and the Norwich Civic Trust have been carried out. English Heritage and the Heritage Lottery Fund were also involved in the preparation of the document. As part of each meeting process the draft document was sent out to all attendees and their comments taken into consideration.
6. The results of a large part of this process were comments regarding mainly the format and wording of the document which were taken into consideration and implemented where necessary.
7. Some more significant comments were voiced which were addressed and changes implemented where necessary.

## Content of the strategy

8. The strategy includes a comprehensive list of all the built heritage assets that the city council owns (grade I, II\*, II and locally listed buildings). Other items of heritage significance such as civic regalia are not addressed by the strategy.

9. In all the city council currently owns 376 heritage assets which make a significant contribution to the character and culture of the city (there are around 1500 listed buildings in the city in all ownerships).
10. The strategy identifies the significance of Norwich as a whole and the assets within it. It identifies the importance and benefits of heritage as a whole and the assets that the city has. It is then linked into other elements such as tourism and business and the financial benefits that this brings.
11. It identifies the role of partner organisations who help to protect and promote the city's heritage. The legislative background and framework which is applied when working with heritage assets is also identified.
12. Of the 376 heritage assets identified 118 have been proposed for designation as "stewardship properties" within the strategy.
13. There is no single definition of what constitutes a stewardship properties, instead these have been defined through the consideration of the following criteria:
  - a) They derive part of their value from civic function
  - b) They offer particularly high levels of cultural and architectural benefit to the city
  - c) They are publicly accessible
  - d) They form part of public spaces which the council has responsibility to preserve and enhance
  - e) They are unlikely to be a housing asset, generate a commercial return or have a substantial residual value.
14. The strategy identifies its main aim is to reduce the repair liability. It discusses the potential sale of some assets and how this can bring wider benefits to the council in terms of income generation and reduced longer term maintenance repair liability. It proposes safeguards about the management and disposal of stewardship assets.
15. Policies and procedures are detailed and how the strategy meets the corporate objectives of the city council is set out. Reasons why the council's heritage assets need special treatment are discussed and how proportionate treatment needs to be given to different types of asset are outlined.

## **Implementation of strategy**

16. The initial aim of the strategy is by March 2015 have the following in place:

- a) A group of officers established to implement the strategy and promote identified projects
- b) Internal launch and training for all staff who deal with the councils heritage assets. This will include production of a list for all staff who work with heritage assets.
- c) Electronic systems will be updated to notify uses of a designation as a heritage asset.
- d) The council will seek to allocate sufficient budget to repairs and maintenance of the portfolio of historic assets to ensure that the overall repairs liability on the buildings for which condition surveys exist is reduced. When applying for external funding sufficient maintenance money will be allocated to look after those assets.
- e) Clear information will be provided to potential purchasers during the marketing of all heritage assets, which should include a description of the heritage significance of the asset. Where, in exceptional circumstances, Stewardship properties are being marketed for sale or long lease, this should be accompanied by a conservation management plan.
- f) Consultation with local heritage groups and English Heritage will take place during the asset review process for stewardship properties.

17. By 2018 longer term aims will have been met:

- a) The council will aim to have thorough condition survey in place for every listed building and scheduled monument and update them at least every five years. They will inform budget allocation, repairs and maintenance work programmes and asset reviews.
- b) Brief statements of significance will be produced for each heritage asset at the same time as the surveys, which should then be used to inform any work to the asset or review of its ownership status.
- c) A review of this strategy should be produced to ensure its is being effectively implemented.

## **Heritage Investment Strategy**

### **NORWICH CITY COUNCIL HERITAGE INVESTMENT STRATEGY**

**March 2014**

#### **CONTENTS**

1. Foreword
2. Purpose and structure
3. Context
4. Resources
5. Policies and procedures
6. Projects

Appendix 1: List of council-owned heritage assets

Appendix 2: List of potential projects

#### **1. FOREWORD**

(To be written)

#### **2. PURPOSE AND STRUCTURE**

Norwich has a fine built heritage and the city council owns a large part of it. Given the increasing financial constraints of local authorities it is important that proper consideration is given to the manner in which these significant assets are managed.

This heritage investment strategy will introduce a better approach to making decisions about the management, maintenance and ownership of the council's heritage assets. It seeks to identify ways of raising income and allowing greater public access at the same time as ensuring the assets are conserved. The strategy will strengthen our ability to secure grant funding and will inform applications.

The strategy will help to:

- 1) Recognise how the conservation and promotion of the council's historic assets can improve the quality of life of Norwich's citizens, promote business investment, boost tourism and benefit the environment.
- 2) Find the optimal viable use for heritage assets that maximises financial returns from asset management while having due regard to responsible conservation practice.
- 3) Find new uses for unused or underused assets.
- 4) Secure external investment in the city's heritage assets.
- 5) Promote community participation in the development and delivery of heritage projects, raise awareness of these projects and provide educational opportunities for members of the community.

The strategy treats heritage assets as being scheduled ancient monuments, statutorily listed buildings, locally listed buildings, conservation areas, sculpture in public spaces, registered parks and gardens and landscape elements that define the historic character of the city. Collections of art or artefacts (e.g. civic portraits and regalia) are not included.

This document is not a comprehensive strategy for the management of Norwich's heritage but rather concentrates on those parts that the council owns.

### **The structure of the document**

**Chapter 3** describes the city's historic environment assets, the benefit the city derives from its historic environment, the contribution of groups who care for the city's heritage and the legislative structure within which we work.

**Chapter 4** explains the resource implications of the strategy in the context of the continuing need to save money and raise revenue. It examines the various budgets that fund works to heritage assets, the income and liabilities relating to the council's heritage assets.

**Chapter 5** explains why the Council owns such a large portfolio, the reasons why heritage assets require different treatment to the rest of the portfolio, the implications of stewardship status and a set of policies that will govern the management of the council's heritage assets.

**Chapter 6** presents some projects that the council plans to start in the next two years that will improve its heritage assets for the benefit of the city.



### 3. CONTEXT

#### The city's heritage

Norwich is a dynamic city that is blessed with a rich legacy of historic buildings and spaces. It has retained a high proportion of its historic buildings, structures and places and the special character of the whole city centre is recognised by its designation as a conservation area. The city's historic buildings contribute significantly to the city's character, sense of place, quality of life for residents, tourism industry and economic health.

It has been said that 'Norwich has everything – a cathedral, a major castle on a mound right in the middle, walls and towers, an admittedly disturbed medieval centre with winding streets and alleys, thirty-five medieval parish churches, and a river'.<sup>1</sup> The most notable point about this statement is that most of those buildings mentioned belong to the council.

The city council's area contains:

- more than 1,500 listed buildings
- 2,600 locally listed buildings in the conservation areas
- 24 scheduled ancient monuments
- 17 conservation areas covering approximately 230 hectares
- the largest surviving medieval walled city in the country with a largely medieval street-pattern contained within the remaining 13<sup>th</sup> and 14<sup>th</sup> century walls
- 31 pre-Reformation churches surviving within the walled city
- one of the finest Romanesque Anglican cathedrals and the largest cathedral close in England, as well as the imposing Roman Catholic Cathedral
- St Andrews and Blackfriars Halls form the most intact English friary complex and have been publicly-owned by the council since the dissolution
- many highly significant religious meeting houses (for example, the Friends Meeting House, the Octagon Chapel and the Old Meeting House) and the first non-denominational municipal cemetery in England - the Rosary Cemetery
- country's largest collection of medieval vaulted undercrofts (most of which are grade II\* listed).

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<sup>1</sup> Pevsner, Nikolaus and Wilson, Bill *The Buildings of England – Norfolk 1: Norwich and the North-East*, 1997, 179

- 20th century Mile Cross estate conservation area was one of the country's first planned council estates and was based on Garden City principles
- 10 historic parks and gardens including those planned by Captain Sandys-Winsch in the 1920s and 1930s (Eaton Park, Heigham Park, Waterloo Park and Wensum Park); they contain many listed structures
- important civic buildings such as the largest surviving medieval Guildhall and a City Hall dating from 1938, which is said to be the 'foremost English public building of between the wars'<sup>2</sup>
- long tradition of mercantile activity resulted in some particularly important medieval merchants' houses, such as Dragon Hall, Stranger's Hall and the Music House (at Wensum Lodge).

### **The benefits of the historic environment**

The historic environment offers many and varied benefits that need to be taken into account alongside direct financial considerations such as income from rents, capital receipts from sales and repair costs during decision-making processes in relation to heritage assets.

According to English Heritage, heritage can help the UK economy grow faster. Further to this it is a key driving factor for international tourism to the UK and therefore benefiting from the expanding international tourism market.<sup>3</sup>

On a local level people spend more in their local economy after investment in the Historic environment. In a survey of 1000 people in areas that had received investment in the historic environment, 1 in 5 visitors stated they spent more in an area after investment and 1 in 4 businesses stated that investment had directly led to an increase in business revenue.<sup>4</sup>

Conservation led development demonstrates what can be achieved with enthusiasm, creativity and confidence; the passion to take on historic assets, the creativity to find solutions to what can at first sight seem to be intractable problems and the confidence of knowing that there will be support for innovative schemes that protect and enhance the significance of a building or place.

### **Quality of life**

The historic environment makes citizens feel proud of their city. In a survey of Norwich residents, 89 per cent said iconic historic buildings were important in making them feel good about their local area, 88 per cent said "attractive townscapes" and 84 per cent

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<sup>2</sup> Pevsner, Nikolaus and Wilson, Bill *The Buildings of England – Norfolk 1: Norwich and the North-East*, 1997, 262

<sup>3</sup> English Heritage – *Heritage and Growth*, 2011, 3

<sup>4</sup> English Heritage – *Heritage and Growth*, 2011, 4

said "other historic buildings".<sup>5</sup> This pride benefits the city through citizens' increased loyalty, their eagerness to promote the city to others and their willingness to care for and respect the city. This is reflected in the number of volunteers involved in the city's heritage.

In 1662 Thomas Fuller described Norwich as a 'city in an orchard' and today the city continues to benefit from its pleasant townscapes and numerous parks. 91% of people feel that parks and open spaces improve their quality of life, while evidence has shown that access to well-maintained parks provides health benefits, increases social cohesion in the community and encourages environmental stewardship.<sup>6</sup>

95% of respondents considered that the regeneration of historic areas improved social interaction with new spaces for meeting, living, socialising and working created. It was also felt to improve perceptions of safety, particularly at night.<sup>7</sup>

### Business investment

Historic areas are more likely to attract unique and independent businesses. These businesses are often seen to have a more 'premium' offer. The higher ratio of smaller, cheaper accommodation is attractive to independent businesses, social enterprises and creative industries<sup>8</sup>. Norwich is in the top ten shopping destinations in the UK<sup>9</sup> with a strong mix of independent shops and high street names, as well as two city centre malls. This enhances the shopping experience and it has also been noted that a historic environment tends to create an ambience that people want to stay and enjoy.<sup>10</sup>

The historic environment is an important factor for people in deciding where to live and work.<sup>11</sup> Businesses report that it is as important for their location decision as road access.<sup>12</sup>

### Tourism

Norwich has a burgeoning tourist industry and the total value of tourism is thought to be around £432m a year.<sup>13</sup> However, given the extent of its heritage offer it does not have the prestige of York or Bath, especially among the overseas markets. Norwich is a popular short stay destination and attracts a large number of day visitors. (around

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<sup>5</sup> Norfolk Citizens Panel / BMG Research *Research Report – Norfolk Citizen's Panel – Wave 18 – Norwich Data*, 2009, 7-8

<sup>6</sup> GreenLink, *Blue Sky Green Space: Understanding the Importance of Retaining Good Quality Parks and Green Spaces, and the Contribution They Make to People's Lives*, 2010

<sup>7</sup> Amion Consulting / Locum Consulting *The Impact of Historic Environment Regeneration*, 2010, 5-6

<sup>8</sup> Amion Consulting / Locum Consulting, *The Impact of Historic Environment Regeneration*, 2010, 3 and English Heritage, *Heritage Counts 2010*, 5

<sup>9</sup> VENUESCORE, 2011 survey

<sup>10</sup> English Heritage, *Heritage Counts 2010*, 5-6

<sup>11</sup> English Heritage, *Heritage Counts 2010*, 4.

<sup>12</sup> English Heritage, *Heritage Counts 2010*, 2

<sup>13</sup> Tourism South East, *Economic Impact of Tourism: Norwich City 2010 Results*, 1

4.7m each year). There is a limited amount of self catering accommodation in the city and many families and longer staying visitors will be staying outside the city.<sup>14</sup> It is also clear that given the wealth of historic assets and cultural venues throughout the city there is great potential for the city to increase its tourism economy with further investment and promotion, especially given that heritage tourism is one of the most significant draws for inbound visitors to the UK,<sup>15</sup> and that the number of visitors to heritage attractions nationally has increased by 28% in the last 10 years.<sup>16</sup> Norwich City Council works closely with VisitNorwich Ltd to increase visitor numbers and grow the visitor economy.

One of the strongest incentives for investing in the historic environment is its importance in affecting perceptions of how attractive a place is to visit. It would also appear that the further people live from a city, the more likely they are to be influenced to visit it by the nature and the quality of its heritage assets; a report concluded that "there is a strong direct link between the number of listed buildings and their popularity as a destination for a day out".<sup>17</sup> Given Norwich's large number of high quality heritage assets, its attractive townscape and expansive hinterland, it is not therefore surprising that it is a popular destination for day trips. An increasing number of short breaks are being taken by more affluent and / or older people, with the city's heritage attractions being a key reason for these visits.

On average half of the jobs created by historic visitor attractions are not on the site but in the wider economy.<sup>18</sup> Approximately 14% of jobs in the city are supported by tourism.<sup>19</sup> The highest proportion of spend in Norfolk by visitors was in the urban area rather than rural areas.

Many of the historic parks are used for popular events, such as the Lord Mayor's Celebration, Openstages and the Norfolk and Norwich Festival. These events bring a huge number of people into the city, including tourists and visitors from the wider region, as well as city residents, bringing a huge economic boost to local businesses and promoting the city.

## Environment

The re-use of historic buildings is inherently sustainable. A significant amount of embodied energy contained within a historic building is lost when it is replaced. Research has found that on average a new energy efficient home takes between 35-50 years to recover the carbon expended in its construction.<sup>20</sup> In many instances a historic building's performance is naturally good or can be relatively easily upgraded, without resulting in significant harm to its character.

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<sup>14</sup> Figures from Tourism South East, *Economic Impact of Tourism: Norwich City 2010 Results*, 1

<sup>15</sup> English Heritage, *Heritage Counts 2010*, 10

<sup>16</sup> English Heritage *Heritage Counts 2012*, 40

<sup>17</sup> Amion Consulting / Locum Consulting *The Impact of Historic Environment Regeneration*, 2010, 3 and English Heritage, *Heritage Counts 2010*, 4

<sup>18</sup> English Heritage, *Heritage Counts 2010*, 11

<sup>19</sup> Tourism South East, *Economic Impact of Tourism: Norwich City 2010 Results*

<sup>20</sup> Empty Homes Agency and the Building and Social Housing Foundation, *New Tricks with Old Bricks: How Reusing Old Buildings can cut Carbon Emissions*, 12.

The re-use of historic buildings can be substantially cheaper than starting from scratch, with the repair of a Victorian terrace house being between 40-60% cheaper than replacing it with a new home.<sup>21</sup>

Norwich benefits from a large number of registered parks and gardens which act as a habitat for a wide variety of wildlife, thereby encouraging biodiversity. The plants and trees found within our parks improve air quality, reducing the effects of pollution and improving water and flood management.<sup>22</sup>

### **Partner organisations**

There are a wide-range of organisations, companies, charities and individuals involved in maintaining, repairing, developing and managing the city's heritage assets. A large number of these organisations rely on volunteers and the contribution of these individuals who give up their time and energy to protect and promote the city's heritage is worth celebrating.

Where buildings are owned by the Council, there are often leaseholds or partnerships in place where the buildings are managed and maintained by others. The most significant of these are with the following organisations:

#### The Norwich Historic Churches Trust

The trust is a charity established in 1973 in order to look after those churches made redundant in the Diocesan review which reported in 1969. The Trust was created to try to find new uses for the churches. The freeholds of 18 medieval churches have been passed to the city council which in turn lets them to the trust on 99 year leases. The trust is responsible for the repair, management and maintenance of the buildings and has a responsibility to find new uses for the buildings, particularly for civic, public or educational uses. The uses include: a puppet theatre, an arts centre, artists' studios, a music school, a martial arts centre, a dance school and places of worship. The trust is currently running a fundraising campaign, with the funds being used to improve services (such as providing water supplies, lighting, WCs and kitchenettes) in four of the churches. There is also a wider scheme incorporating a strategic action plan to implement as part of a bid to secure Heritage Lottery Funding. The council maintains the many of churchyards under the closed churchyards legislation.

#### The county council

The city council owns many of the city's museum buildings, for example, the Castle, the Bridewell Museum and Stranger's Hall. The county council (Norfolk Museums and Archaeology Service) have agreements with the city council regarding these buildings and there are split maintenance responsibilities where the city normally maintains the exterior and the county the interior. In order to ensure the relationship runs smoothly, there is a jointly operated buildings group involving both city and county officers. The

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<sup>21</sup> English Heritage, *Heritage Counts*, 2003

<sup>22</sup> GreenLink, *Blue Sky Green Space: Understanding the Importance of Retaining Good Quality Parks and Green Spaces, and the Contribution They Make to People's Lives*, 2010

county has recently completed an HLF-funded refurbishment and reorganisation of the Bridewell Museum and is currently developing plans for changes to the way the castle is presented. Wensum Lodge is owned by the City Council but run by the County Council

#### The Norwich Preservation Trust

The trust was established in 1966. It was set up to preserve, restore and maintain architecturally and historically important buildings in Norwich and takes on commercially non-viable projects. It holds long leases on council-owned property such as Augustine Steward House (restored by them in 1992-1996 and used as offices and an antiques centre), properties at 2 - 4 St Andrew's Hill (restored 1991-1992) and more recently the Briton's Arms on Elm Hill, a coffee shop and flat where repairs (primarily funded by English Heritage) and works to conserve and restore the property are well underway and nearing completion. The council liaises regularly with the trust in relation to individual projects and Buildings at Risk.

#### The Norfolk and Norwich Heritage Trust

The trust is a registered charity set up in 1987 to care for and conserve Dragon Hall, a medieval merchant's hall owned by the city council, and to promote it as an educational resource. The building is open as a museum, as well as holding public and private events.

#### The Mousehold Conservators

Mousehold Heath is a unique 88 hectare site made up of heathland, forest and recreational areas in the north-east of Norwich. Although it is not designated as a heritage asset in its own right, the heath has historically played an important role in the life of the city, with residents using it to graze animals and to collect bedding / feed for livestock and fuel for winter. It provided the base for Robert Kett's camp during the rebellion he led in 1549, as well as a vantage point of the city which has resulted in many famous paintings. An Act of Parliament in 1880 required the city council to manage the heath on behalf of its residents and in 1884 the Mousehold Conservators were established to manage the heath for the council. The Conservators hold the budget for the heath and carry out work such as heathland reclamation. There are a couple of designated heritage assets on the heath, such as the remains of St William's Chapel which is a scheduled ancient monument and the former pavilion (now Zak's restaurant) which is a locally listed building.

As well as these organisations that help to manage the council's buildings, there are other stakeholders that we work closely with on a regular basis on heritage matters. These are:

#### The Norwich Society

The Norwich Society is a civic society that was established in 1923 with the following aims:

- A. To encourage high standards of architecture and town planning in Norwich

- B. To stimulate public interest in and care for the beauty, history and character of the city and its surroundings.
- C. To encourage the preservation, development and improvement of features of general public amenity or historic interest.
- D. To pursue these ends by means of meetings, exhibitions, lectures, publications and other forms of instruction and publicity, by co- operation with the local Authorities and other bodies, and promotion of schemes of a charitable nature.

It has a large local membership. Recent projects include the extension of the local list<sup>23</sup> and an on-going project to increase promotion of the city walls (also with HEART).

#### Norwich HEART (Heritage Economic and Regeneration Trust)

HEART was established in 2003/04 as an umbrella organisation to help develop and promote Norwich's heritage offer and is a private charitable company. The organisation has been successful in running several grant-funded projects such as the Norwich 12; Shaping 24 and the Norwich Lanes, which have helped to promote and interpret the city's heritage assets and also commissioned conservation management plans for the 'Norwich 12' buildings. HEART also runs the very successful Heritage Open Days in September of each year and promotes heritage education.

#### VisitNorwich

VisitNorwich is the official destination management organisation for the Norwich area and is a non-profit making private / public sector partnership, partly funded by Norwich City Council. It markets Norwich as a visitor destination throughout the world and produces information to promote the city and ensure that visitors make the most of their visits.

#### Norwich Business Improvement District

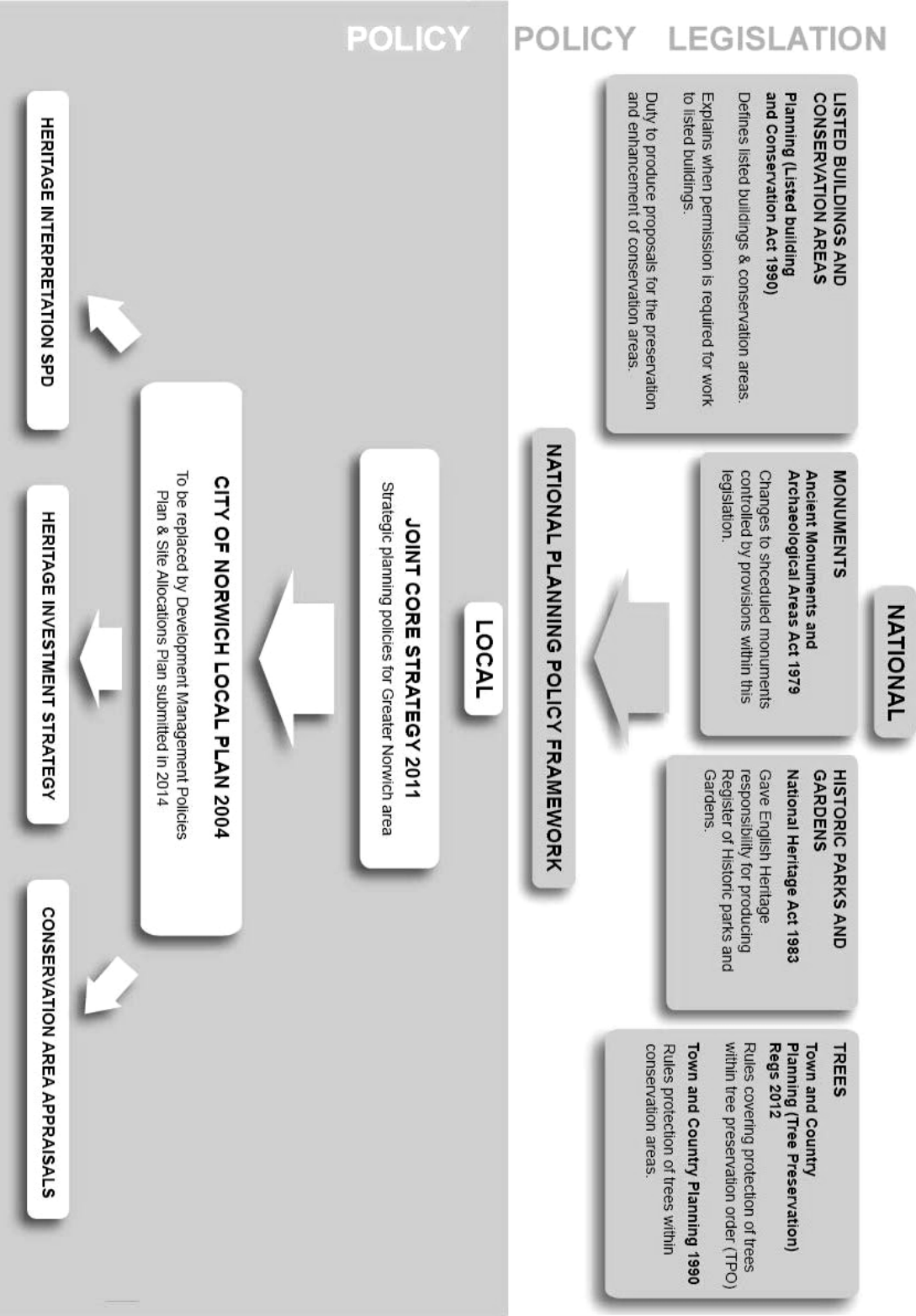
Established in November 2012 the Norwich Business Improvement District (BID) is run for local businesses by local businesses. The BID covers a defined area of the city centre where businesses plan how to improve their trading environment, identifying additional projects and services that develop the city centre and trade. Investment in the BID area aims to enhance and promote the local environment for businesses, employees and customers.

### **The Legislative Background**

The council has to work within a framework of legislation and planning policy when it does work to its historic assets. This framework is illustrated by the diagram below. This strategy does not form part of the framework, the legal framework within which the City Council manages its heritage assets remains the same.

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<sup>23</sup> This Council / Norwich Society project was used as an exemplar in the recent English Heritage guidance, *Good Practice Guide for Local Heritage Listing*, May 2012.





#### 4. RESOURCES

Money will be required to deliver the strategy, particularly to cover staff time and repair costs but like all local authorities Norwich City Council has for several years faced funding cuts and been under increasing pressure to make savings. The council has saved £14.6 million from its general fund over the last three years (equivalent to a 40% reduction in gross controllable general fund revenue costs). These measures have had implications for the management of the council's assets; for example, constraining the council's ability to undertake condition surveys and act upon them.

The main source of capital receipts is currently from the sale of property, including historic buildings. The on-going programme of asset reviews determines which properties are retained and which are sold.

At present, the council's heritage assets can benefit from three different funding sources depending on the type of asset and the work proposed. The **non-housing capital programme** is set annually and based on the submitted bids for capital projects. NPS Norwich and Citywide Services are allocated **revenue budgets** from the general fund to maintain heritage assets. They then allocate the budgets for repairs and maintenance of all the assets they are responsible for according to corporately agreed their own scoring systems. The **housing revenue account** is a separate funding pot specifically for housing.

The current repairs liability relating to the council's heritage assets is not known as there are few current condition surveys. However it is likely to be a very large sum. Given the council's financial constraints and many other calls on its resources this is daunting. The council's heritage assets are expensive to maintain and operate This is offset by income from many of the heritage assets.

An aim of the Heritage Investment Strategy is to reduce the repair liability, which would be likely to mean heavy investment in the assets in order to reduce the longer terms costs associated with them. At present this level of funding is unlikely to be available and as a result the benefits will be reached over a longer period of time and will also partially be achieved through the reduction in the number of assets, whilst seeking to maintain the level of funds available for repair and maintenance.

Many of the measures proposed in the next section (for example, regular condition surveys and applying for and managing grants) have cost implications but equally there is the potential to generate an income, especially over the longer term (for example, ensuring dilapidation surveys are acted upon; or carrying out repairs / refurbishment of an asset to bring it back into a viable use and allowing it to be let). Business cases will be used as a tool to determine what investments to make.

The sale of some heritage assets can bring benefits to the council in terms of income generation and a reduced longer term maintenance and repair liability, as well as bringing benefits to the assets themselves. Funds raised through asset sales improve the financial position of the council and thus increase the ability to invest in the remaining assets.

It is important to value the contribution that stakeholders, such as the Norwich Historic Churches Trust (NHCT) and the Norwich Preservation Trust (NPT), who hold long leases on council properties, can bring to this process. They manage effectively, maintain and enhance council-owned assets, many of which are often highly significant. Their good work reduces the financial liability to the council.

It will be increasingly important that external funding is sought for projects. This strategy demonstrates to grant-giving bodies the council's plans to manage its significant heritage portfolio in a better way. The council needs to be alert to potential funding sources. The process of seeking and applying for grant aid and subsequently managing and promoting our own projects will require the allocation of staff resources for the preparation of bids and the management of subsequent grants.

Where capital funding has been allocated to a project a maintenance budget will be a particular requirement to ensure the long-term sustainability of the scheme and to ensure any benefits are not short-lived. This will be especially important where external grants have contributed to the scheme as on-going maintenance is often a contractual requirement.

## **5. POLICIES AND PROCEDURES**

A recent research report stated that most local authorities own between six and twenty listed buildings, although it is noted that larger unitary authorities and county councils tend to own more.<sup>24</sup> Despite its relatively tightly drawn boundaries, the council owns more than 195 listed buildings and scheduled monuments plus numerous locally listed buildings and nine registered parks and gardens. The properties range from high status buildings such as the castle, museums and churches, to Georgian town houses, council housing, statues and bridges. All the assets (including locally listed buildings and registered parks and gardens are listed in appendix 1 and their location shown on the maps in appendix 2. This impressive portfolio is of great benefit to the city but a financial liability to the council.

Most of the historic assets are owned or managed for one or more of the following reasons:

1. For stewardship reasons (frequently where very significant historic assets may have been gifted to the council to own permanently).
2. To provide housing for people who might not otherwise be able to house themselves on the open market.
3. To provide for the financial or strategic benefit of the council (the council holds a large commercial property portfolio for investment purposes).
4. As they are needed to deliver council services (e.g. City Hall, parks and cemeteries).

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<sup>24</sup> Green Balance with Grover Lewis Associates Ltd, *Local Authority Heritage Assets: Current Issues and Opportunities*, March 2012, para 4.3 and para 7.1.

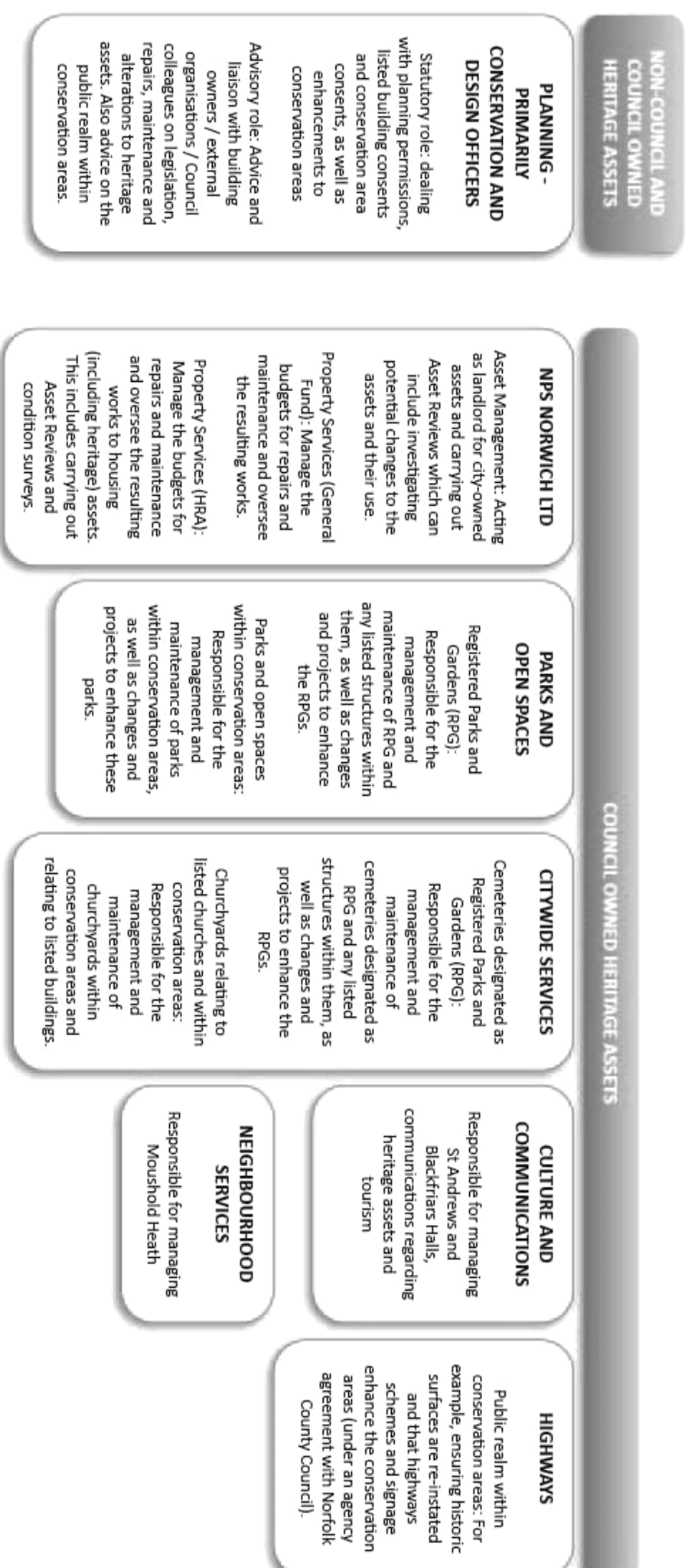
The council's corporate plan reflects the importance of the historic environment to the citizens of Norwich and the importance of the assets it has responsibility for. The table below lists the objectives in the corporate plan and how the heritage investment strategy relates to them.

<b>NORWICH CITY COUNCIL CORPORATE OBJECTIVE</b>	<b>HOW THE HERITAGE INVESTMENT STRATEGY MEETS THE OBJECTIVE</b>
A safe and clean city	The re-use and regeneration of disused and dilapidated historic buildings and areas promotes safety in the city.
A prosperous city	The strategy will help secure funding for historic environment regeneration schemes, thereby creating new jobs, homes and commercial accommodation. Improvements to the built environment should encourage tourists, visitors and others to visit the city, thereby increasing its prosperity.
Decent housing for all	The re-use of empty buildings and the refurbishment of existing homes can provide new housing.
City of character and culture	Regeneration schemes relating to the historic environment, including parks and open spaces, as well as improvements to the management of Council-owned heritage assets, will help to promote the city as a place of character and culture.
Value for Money Services	The strategy should ensure that value for money services are provided by introducing new ways of managing the Council's heritage assets.

The council's political commitment is reinforced by the representation of councillors on the boards of some of the local heritage organisations and inclusion of the role of Design and Historic Environment Champion in the list of responsibilities of a Cabinet member.

The council has many different roles when it comes to protecting, managing and promoting the city's heritage assets and there are different parts of the council involved in fulfilling these various functions (see the diagram below). In most instances, our heritage assets are managed through joint working across council service areas resulting in a number of successful projects in recent years, including the refurbishment of part of City Hall; the repair of the Guildhall tower; the repair and revitalisation of the War Memorial Gardens; works within Chapelfield Gardens and Waterloo Park and streetscape enhancements around St Andrew's Plain and St Augustine's Street.

## COUNCIL AND NPS ROLES RELATING TO THE HISTORIC ENVIRONMENT



The council has recently set up a joint venture with NPS called NPS Norwich Ltd. The council's estates management and property teams have transferred to the new company and continue to provide various services relating to council-owned assets, of which heritage assets form a part. This includes their repair and management.

The council has a highways agency agreement with the County Council so it is responsible for managing the highway network. Although not explicitly identified as a heritage asset in its own right, it should be acknowledged that the highway network and associated public realm (especially within the area of the walled city) is of immense historical significance and surface treatments, signage and lighting can contribute significantly to the enhancement of historic assets. The council's traffic engineers and landscape architects work on streetscape projects including 'streets for all'.

All of the council's property assets are managed according to the *Corporate Asset Management Strategy 2011/2016*, which was published in July 2011

[<http://www.norwich.gov.uk/YourCouncil/KeyDocuments/CouncilPoliciesAndStrategies/Documents/CorporateAssetManagementStrategy1.pdf>]. This document sets out the how the council manages its property assets. Heritage assets are a core component of the portfolio and the strategy recognises the challenges associated with their maintenance.

There is an on-going programme of review relating to all Council-owned assets which sometimes results in their sale. With regard to non-stewardship properties it is considered this approach remains appropriate. English Heritage guidance states: 'The disposal of heritage assets, especially those that are straight-forward to adapt to alternative uses, may provide the best solution for such property. Government guidance urges local authorities only to continue to hold property assets if they fit the authority's current requirements in terms of achieving its objectives, including financial. In the current climate, there needs to be good reason to retain council property.'<sup>25</sup>

Our asset reviews are in line with good practice, but more careful consideration is required of the asset<sup>26</sup>. When looking at the long-term viability of an asset, either through sale or alternative uses, the desirable goal should be the optimum viable use which protects its significance. This may not necessarily be the most commercially lucrative.

The council's heritage assets need special treatment because:

- Private owners are expected to maintain and treat their listed buildings in accordance with legislation. The council should therefore be doing the same.
- Legislation requires heritage assets to be treated differently in certain respects.

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<sup>25</sup> English Heritage, *Pillars of the community: The transfer of local authority Heritage assets*, January 2011

<sup>26</sup> English Heritage, the OCG and the DCMS, *The Disposal of Heritage Assets: Guidance Note for Government Departments and Non-departmental Public Bodies*, 20

- Repairs are more urgent and maintenance is more cost-effective than repair. A downpipe left leaking on a 16<sup>th</sup> century timber-framed building could lead to extensive and costly repairs being required.
- Many of the assets are nationally important and the council has a duty to take this responsibility seriously.
- The heritage assets owned by the council contribute greatly to the city in terms of its economy; environment and civic pride of its residents as well as enabling us to deliver other services (e.g. the provision of parks, cemeteries).

Some of the council's heritage assets need especially careful treatment. A class of asset called stewardship properties has been developed and these properties are listed in appendix 1. These normally have the following characteristics:

- Derive part of their value from their enduring civic function (e.g. City Hall, St Andrews and Blackfriars Halls).
- Offer particularly high levels of cultural and architectural benefit to the city (e.g. Castle, Bridewell).
- Are publicly-accessible (e.g. Strangers Hall, Suckling House and Hall).
- Form part of the public spaces which the Council has a responsibility to preserve and enhance (e.g. statue of Sir Thomas Browne in Hay Hill).

They are unlikely to:

- Generate (or have the potential to generate) a commercial return or have a substantial residual value;
- Include housing heritage assets, as they would generate an income, have a residual value and normally be for private domestic use.

The council recognises that there is a long term responsibility to ensure that stewardship properties are maintained and managed to protect and maximise their heritage value. Stewardship properties would only be sold in special circumstances, such as extreme financial need. Typically any sale would be accompanied by a conservation management plan and selection of buyer based on a combined evaluation of price and sensitivity of conservation approach following purchase. Very often a long lease would be preferable to sale of the freehold.

Many of the stewardship properties are a financial liability and a burden to a small council like Norwich City. By making a long term commitment to these particular assets we plan to maximise our ability to secure external funding towards projects that seek to conserve them and increase access to the public. This will help to secure their future in public ownership, avoiding pressure for disposal. Several of the projects in section six relate to stewardship properties.

The council maintains a *Buildings at Risk Register*, which lists all buildings considered to be 'at risk' within the city. The conservation team work with building owners to find ways to remove the buildings from the register. There are currently six council-owned buildings on the register which are currently being worked on and will be removed from the register once complete.

The policies and procedures set out below are best practice that will be followed by all council and NPS Norwich staff and consultants or contractors when they work with council-owned heritage assets. It is recognised that given the current resource constraints, not all of the new policies and procedures can be introduced immediately. A timescale for their introduction is given.

By March 2015

1. A group of officers will be established to implement the strategy, including promoting the projects identified in section six. It will ensure that community involvement and educational outreach are a key component in projects relating to heritage assets.
2. The strategy will have an internal launch that includes training for staff and contractors who deal with the council's heritage assets.
3. The strategy and list of council-owned assets will be provided to all staff that work with them. The list of assets will be updated at least annually by a nominated officer.
4. All asset registers held by the council will be clearly marked to indicate whether an asset is considered to be a heritage asset and if it has stewardship status. A 'pop-up' will be added to Academy (software used by housing) to notify users of a designation as a heritage asset.
5. All staff dealing with heritage assets will be made aware of how to access detailed information on them (e.g. through the listed buildings module of Uniform; LocalView; ArcView GIS; the council's website; the conservation team).
6. Managers will be given responsibility for ensuring that all staff, contractors and consultants dealing with heritage assets are aware of their responsibilities and liabilities (e.g. that it is a criminal offence to carry out unauthorised works to listed buildings, inside and outside) and should be suitably qualified to carry out their work.
7. The council will seek to allocate sufficient budget to repairs and maintenance of the portfolio of historic assets to ensure that the overall repairs liability on the buildings for which condition surveys exist is reduced. When applying for external funding sufficient maintenance money will be allocated to look after those assets.
8. When buildings become vacant swift decisions will be made to ensure they are reoccupied to avoid neglect and vandalism (see [www.english-](http://www.english-heritage.org.uk)

[heritage.org.uk/publications/vacanthistoricbuildings/acc-vacant-historic-buildings.pdf](https://heritage.org.uk/publications/vacanthistoricbuildings/acc-vacant-historic-buildings.pdf)).

9. Clear information will be provided to potential purchasers during the marketing of all heritage assets, which should include a description of the heritage significance of the asset. Where, in exceptional circumstances, Stewardship properties are being marketed for sale or long lease, this should be accompanied by a conservation management plan.
10. The sale of a freehold or leasehold interest in grade 1 and 2\* listed buildings and stewardship properties by unrestricted auction is unlikely to be acceptable because it risks bidders paying too high but then being unable to afford unanticipated high repair costs or the high quality work required for any alterations. This can lead to council staff being involved in protracted and adversarial negotiations. Other forms of sale (informal tender or sale by private treaty) will be more appropriate. The bidder's plans for the buildings and evidence of the availability of sufficient funds to carry them out will be required. The criteria that the council will use for the assessment of bids will be clearly set out and give sufficient weight to quality of approach as well as price to avoid such pitfalls. Long leaseholds and inviting the involvement of a building preservation trust will always be considered.
11. Consultation with local heritage groups and English Heritage will take place during the asset review process for stewardship properties.
12. The Council is under no obligation to accept the highest offer for disposals of historic assets although price is likely to be the main factor in selecting successful bidders other than for stewardship properties and grade 1 and 2\* listed properties.
13. Regular rent reviews will be undertaken to ensure that market rents are being derived from each asset and opportunities for increasing returns through improving the condition of a building or changing its use will be explored.

By March 2018

14. The council will aim to have thorough condition surveys in place for every listed building and scheduled monument and update them at least every five years. They will inform budget allocation, repairs and maintenance work programmes and asset reviews.
15. Brief statements of significance will be produced for each heritage asset at the same time as the surveys, which should then be used to inform any work to the asset or review of its ownership status.
16. A review of this strategy should be produced to ensure it is being effectively implemented.



## Ongoing

17. Public realm improvement within conservation areas will be pursued alongside traffic management schemes and in the context of master plans that seek to provide a better setting for historic buildings.
18. Sufficient in house conservation expertise will be retained in Planning Services and NPS Norwich Ltd to ensure that these policies and procedures are implemented along with the normal regulatory function of the council.

## **6. PROJECTS**

This section identifies potential projects relating to the council's heritage assets, candidate partner organisations and funding sources. The projects in this section are being treated as a priority. It is intended that they should start before April 2015. The priority projects will be reviewed on an annual basis at the same time as the capital programme for the following year is developed.

Projects have been identified as a priority because of one or more of the following factors: a) money is available; b) the opportunity is only available for a short-time; c) there are urgent problems to remedy.

An important component of all the projects will be to work with local interest groups and ensure that opportunities for education and community participation are included in them. The extent of this involvement and the type of education will depend on the site and the project. Statements of significance will be deposited with the Norfolk Historic Environment Record adding to this important publicly-accessible resource.

### **City Centre**

#### 1. Castle Gardens and lodges

The castle gardens are designated as a scheduled monument and the lodges to the castle bridge are also listed. The lodges are unused and in need of repair and this scheme would consider uses for these lodges as well as the restoration and enhancement of the Victorian gardens. A small amount of Section 106 funding is currently available, which will be used for developing a scheme for which additional funding can then be sought.

#### 2. Chapelfield Gardens

Works to improve entrances, lighting and paths within the Gardens have been designed and are currently being implemented. A collateral benefit will be the provision of an alternative pedestrian route to facilitate the St Stephens and Chapel Field North project.

### 3. Magpie' Printers site and City Walls

This site at an important gateway into the city centre conservation area became vacant following the demolition of the former Magpie Printer's building due to its structural instability. The medieval city walls, which are a scheduled monument, run through the centre of the site. The city wall and has been repaired and there are now plans to landscape the area in front of the walls facing Magpie road.

### 4. Ninham's Court, Bethel Street

This is a grade II\* listed house in the city centre. It is highly significant with parts of it dating back to the medieval period. The building was gifted to the council and as such must remain in our ownership. It has been empty for a number of years. The Council has been developing a scheme with a building preservation trust called the Vivat Trust who may take on a lease of the building and carry out repairs for use as a holiday home, using their own sources of funding. They have recently produced an option/viability appraisal.

### 5. St Andrews and Blackfriars Halls

The St Andrews and Blackfriars Halls is a large monastic complex in the centre of the city that has been owned by the council since the dissolution of the monasteries. It is grade I listed as well as being a scheduled monument. The complex is expensive to maintain and there is currently some backlog in the repairs programme. A feasibility study is required to establish the role of the Halls in the future, the extent of repairs required and potential future projects that would improve the effectiveness of the Halls and enhance their appearance and the spaces around them. This should be combined with work already completed as part of previous assessment.

### 6. War Memorial Gardens undercroft

This grade II listed structure was recently repaired but the undercroft remains empty and only occasionally used. It has planning permission for use as an art gallery/space. This proposal is being investigated further as it has potential to bring it into beneficial use, provide an arts facility in the city centre and generate an income for the council.

### 7. Tombland Toilets

The concrete underground toilets in Tombland were closed in April 2012 due to anti social behaviour that took place there, the difficulty of providing good access and the cost of keeping them open. They are an unattractive feature in a critically important historic public space. The structure should be removed and the space paved and returned to open space.

## **Outside city centre**

### **8. Mile Cross Gardens and pavilions**

This is a Registered Park and Garden within the Mile Cross Conservation Area. Improvements are required to the area given that it is currently on the *Heritage at Risk Register*. The park and its pavilions are under-used and some of the historic structures such as the colonnade are damaged. It has the potential to provide an attractive facility for residents in a relatively deprived part of the city. There is some Section 106 funding available for the scheme.

### **9. Mousehold Heath**

Higher Level Stewardship funding has been awarded by Natural England to the Mousehold Conservators for the heath and one of the main aims is the restoration of the heathland. This grant aid is available for the next 10 years and there is also some capital funding from the council available. This is an ongoing project. It will also complement one of the key projects that will be funded through the cycle city ambition grant.

The remains of St Williams Chapel on the Heath are a scheduled monument and although few above-ground remnants are evident this is an important site, dedicated to St William, the saint and martyr who is thought to have been murdered on there in 1144.

### **10. Waterloo Park Pavillion**

The pavilion is empty and there have been problems with roof leakage. It has potential to be used as a social space for weddings and other gatherings. The lack of adequate car parking is considered to discourage this type of use. A business case is being developed to repair and upgrade the facilities associated with promotion of the pavilion for suitable events and additional car parking.



## Report author to complete

<b>Committee:</b>	Cabinet
<b>Committee date:</b>	26 March 2014
<b>Head of service:</b>	Graham Nelson
<b>Report subject:</b>	Heritage Investment Strategy
<b>Date assessed:</b>	11 March 2014
<b>Description:</b>	The Heritage Investment Strategy has been prepared out of a requirement to effectively manage the significant assets that the council owns. With increased constraints on local authorities it is important to fully understand the extent of assets that they own and their significance.

	Impact			
Economic (please add an 'x' as appropriate)	Neutral	Positive	Negative	Comments
Finance (value for money)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The Heritage Investment Strategy will help identify all of the most significant heritage assets that the council has ownership over. This will focus any future spending on assets to the right projects which are identified as stewardship properties and individual projects. Potential funds will be created from the sale of certain lesser assets
Other departments and services e.g. office facilities, customer contact	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
ICT services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Economic development	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The Heritage Investment Strategy identifies the importance of the city's heritage and that it is integral to positive economic development particularly within the tourism sector. The continued care and enhancement of the councils heritage assets with stewardship properties in particular will benefit both the city council and the city as a whole.
Financial inclusion	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Positive benefits will be had through cost savings made from focussing funding on Stewardship Properties and identifying where the most needed resources will be spent in terms of the councils heritage assets. It will also provide a base for grant schemes.

	Impact			
<b>Social</b> (please add an 'x' as appropriate)	<b>Neutral</b>	<b>Positive</b>	<b>Negative</b>	<b>Comments</b>
Safeguarding children and adults	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<u>S17 crime and disorder act 1998</u>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Human Rights Act 1998	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Health and well being	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Equality and diversity</b> (please add an 'x' as appropriate)	<b>Neutral</b>	<b>Positive</b>	<b>Negative</b>	<b>Comments</b>
Relations between groups (cohesion)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Eliminating discrimination & harassment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Advancing equality of opportunity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Environmental</b> (please add an 'x' as appropriate)	<b>Neutral</b>	<b>Positive</b>	<b>Negative</b>	<b>Comments</b>
Transportation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

	Impact			
Natural and built environment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The most significant heritage assets are identified within the strategy and its main aim is to protect and enhance the built environment. The identification of stewardship properties will allow extra consideration to be given towards them. The proposals condition surveys to be made for these properties will enable closer monitoring and therefore more informed conservation and care.
Waste minimisation & resource use	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Pollution	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Sustainable procurement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Energy and climate change	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
(Please add an 'x' as appropriate)	Neutral	Positive	Negative	Comments
Risk management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The Heritage Investment Strategy will enable the full assessment of potential buildings that require immediate action through repair. The condition surveys carried out through implementation of the strategy will identify these areas of potential risk and required action. It will enable the potential properties that are not identified as stewardship building that would possibly be better placed in the in the care of alternative owners.

## Recommendations from impact assessment

### Positive

It has been identified that the Heritage Investment Strategy will have several significant positive implications as a result from its adoption and subsequent implementation. The most significant of these are likely to be positive impacts on the natural and built environment, value for money and economic development.

### Negative

Nothing of any significance.

### Neutral

The neutral aspects of the assessment are due to the subject specific nature of the strategy. However there may be indirect benefits to these aspects from the implementation of the Heritage Investment Strategy.

### Issues

There are no significant issues in relation to the implementation of the Heritage investment strategy.





**NORWICH**  
City Council

Attn: Scrutiny officer

## REQUEST FOR CALL – IN

### Decision you wish the scrutiny committee to consider

Item 8 Norwich city council cabinet: Heritage Investment Strategy

### Decision making body or officer/ cabinet member

Cabinet

**Date decision was made** 26.03.14

**Date of your request** 31.03.14

**Date received**.....

(office use only)

### Member(s) calling in this decision

**1 Print name** ..... **signed** .....

**2 Print name** ..... **signed** .....

**3 Print name** ..... **signed** .....

**If you consider that the call – in has been made because the decision was outside the policy or budget framework, please give an explanation**

N/A

**What action would you like to see the decision-maker take to address the concerns outlined in this call-in?**

Bring the report to a special meeting of scrutiny committee for consideration, so that the questions below can be addressed and it be strengthened and potentially amended so that it is resilient and fit for purpose.

**If this was a planned decision in the council's forward plan, at what stage did you inform the cabinet portfolio member or the leader that you had concerns?**

Points were raised and questions asked at cabinet meeting.

**If this was not a planned decision not appearing on the forward plan, what attempts have you made to speak to the portfolio member or the leader before calling in the decision?**

N/A

**Please tick which of the following may be applicable**

**All relevant considerations were not fully taken into account in reaching the decision YES**

The decision was not proportionate to the desired outcome

**The decision was not taken while taking into account due consultation and/or professional officer advice YES**

The decision was not taken in compliance with the council's schemes of delegation, financial rules and instructions relating to contracts

**When making the decision, clarity of the aims and desired outcomes was not displayed. Or the process lacked openness and transparency YES**

**Reason for calling in the decision – please explain how the principle(s) ticked above has/have not been adhered to**

- **Due consultation/the process lacked openness and transparency:** In order to achieve the effective functioning of the strategy, it is critical that stakeholders can fully support it and have had active and evidenced public input in the final wording of the strategy and the opportunity to influence, comment on and approve it as a whole. While some focus groups have taken place as part of the process, stakeholders have not had full involvement in the finished version. Full consultation on a draft has not taken place or been published. Active scrutiny of the Heritage Strategy would enable local groups, which the document references as critical to its success<sup>1</sup>, to fully participate in this.
- **Clarity of aims and desired outcomes:** Although the report establishes principles, it should also be clear what checks and balances are in place to make sure that the principles are as incapable of being misinterpreted in future as possible. Scrutiny would be able to make recommendations on this which would help the report to become robust over a long time scale, and are also necessary to strengthen it as it will be operated in part by a joint venture<sup>2</sup>.
- **Clarity of aims and desired outcomes:** It should also examine/include/be clear on the ward councillor role in relation to whole, to enable them to participate in process and represent council decisions to residents effectively.

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<sup>1</sup> From the Heritage Strategy: "It is important to value the contribution that stakeholders, such as the Norwich Historic Churches Trust (NHCT) and the Norwich Preservation Trust (NPT), who hold long leases on council properties, can bring to this process. They manage effectively, maintain and enhance council-owned assets, many of which are often highly significant. Their good work reduces the financial liability to the council. "

<sup>2</sup> From the Heritage Strategy: "The council has recently set up a joint venture with NPS called NPS Norwich Ltd. The council's estates management and property teams have transferred to the new company and continue to provide various services relating to council-owned assets, of which heritage assets form a part. This includes their repair and management."

### **The procedure/order for called-in items**

When considering a matter which has been called - in for scrutiny under the council's decision making process, the committee will normally consider the papers on that matter which was considered by the cabinet when making its proposed decision, the minute and the points raised as part of the call - in.

The main account of the decision will normally be given by the cabinet member(s) and executive head of service or other officer(s) concerned.

Any member of the council will be entitled to attend the committee and to speak and ask questions.

### **The procedure/order for called - in items at committee will normally be:**

- 1) the chair will explain the procedure and identify the main decision maker attendees and will ask any person who also wishes to speak or give a response to the call - in to identify themselves;
- 2) the members of the council who called - in the item, if not members of the committee will be entitled to speak;
- 3) the attendees giving account of the decision and response to the call - in, including the cabinet member(s) and director(s) other officer(s) concerned;

Following the account given of each of the decision maker attendees, members of the committee may ask questions, followed by questions from the members of the council who called in the item.

- 4) any person who also wishes to speak or give a response to the call - in to identify themselves at the start of the proceedings; Following questions from members of the council, at the discretion of the chair, any other person may put questions to the attendees giving account of the decision and response to the call - in, except that no member of the public can put questions to another member of the public.
- 5) before the chair sums up the scrutiny committees final conclusion(s) the attendees giving account of the decision and response to the call - in are given an opportunity, if they wish, to sum up any final thoughts or conclusions they may have reached as a result of the meeting.

***At any stage of the proceedings, the committee may resolve to exclude the press and public under the relevant paragraph of part 1 of schedule 12A of the local government act 1972, if there is likely to be disclosure of exempt information.***