



The National Trust
for Scotland

**ACQUISITIONS AND DISPOSALS
EVALUATION of HERITAGE SIGNIFICANCE**

July 2003

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Approved by NTS Council 4 July 2003

Introduction

Policy 3 of the Trust's Acquisition Policy states:

'The Trust will acquire places or material it has assessed to be of:

- a) international or national significance in terms of their cultural and/or natural heritage; or
- b) critical significance to a particular area or a key surviving or outstanding example of a particular type of heritage asset; or
- c) lesser significance than a) or b) but where they protect or enhance the significance of an existing property or are acquired under Revolving Fund mechanisms such as the Little Houses Improvement Scheme'

Under the section on Alternatives to Trust Ownership and Disposals the Acquisition Policy states:

'The Trust will use the same criteria applied to acquisitions in evaluating when it is appropriate to dispose of heritage assets'

In order to implement these parts of the Acquisition Policy, this paper establishes criteria for assessing heritage significance in the context of both acquisitions and disposals. This should ensure a consistency of approach to evaluation and improve the quality of the decision-making process. In examining criteria for heritage significance three points must be remembered:

1. These criteria are to be applied to assess the **inherent** heritage merit of a place or material. Other factors such as the types of property already in Trust ownership or, in the cases of disposals, factors such as donors' wishes or the history of Trust ownership will be considered during other stages of the acquisition/disposal process.
2. This assessment of inherent heritage merit does not address the issue of current status or condition of a place or material, but Policy 5 of the main Acquisition Policy makes clear that the Trust 'may acquire a degraded property because of its potential for improvement ... where it can be realistically stabilised, safeguarded or otherwise placed in favourable condition'.
3. Any assessment based on the attached criteria is not intended to be a **comprehensive** evaluation of significance, but rather a tool to establish a cut-off point below which the place or property is not considered to be of sufficient heritage merit to warrant Trust acquisition or retention.

Heritage Significance Criteria

In order to establish criteria for assessing heritage significance, three procedural stages need to be addressed:

1. Identify the main categories of heritage significance which the place or material displays or those which may emerge in the future

Category of Heritage Significance	Wording in NTS Acts of Parliament	Modern Equivalents
Natural Heritage	Natural aspects and features; animal and plant life; scientific; some aspects of natural beauty	All aspects of natural heritage interests including: geological and biological features; biodiversity; some natural aspects of landscape; scientific and research values
Cultural Heritage	Historic and national interest; antiquarian interest; articles of artistic or scientific interest; buildings of architectural or historic interest and their contents; articles and objects of historic or national interest	All aspects of historic cultural heritage including: archaeology; architecture; buildings; collections; cultural and designed landscapes; gardens; industrial archaeology; scientific and research values; places associated with historic events, people, myths or folklore
Aesthetic	Natural beauty (aspects related to visual and aesthetic appreciation of landscape and nature)	Landscape; wild land; scenic areas; scenic or picturesque places; visual distinctiveness; artistic merit or creative qualities
Social	Benefit of the nation; access; public resort; recreation; education; enjoyment	Access; enjoyment; formal and informal education; public and community interest; sense of place; local distinctiveness contributing to sense of identity

2. Apply criteria for ascribing a level of significance to the potential acquisition or disposal

A positive answer to one or more of the following questions indicates a nationally significant place or material of sufficient merit to consider acquiring or retaining as part of the Trust’s portfolio. Additional issues/questions to consider in *italics* will help to define significance further:

Designation. Is the place already designated as being of international or outstanding national importance? *What are the reasons for designation and how up to date was the information/appraisal which led to designation? Absence of designations does not preclude a place from consideration for Trust acquisition or disposal (see Principle 5 paragraphs 15 – 17); their presence just makes the assessment process easier.*

Exemplar (best/good example of its type). Is the place acknowledged as an outstanding example of an important class or type of place within a Scottish context¹? *Why is the type itself considered important – is it particularly distinctive or characteristic of Scotland, does it make up or represent an episode in a particularly important or characteristic part of Scottish cultural or natural heritage? Why is the place considered an outstanding example of this type – does it encompass all the characteristics of its type, is it particularly celebrated within Scotland, is it acknowledged or does it have recognition/influence beyond national boundaries? Again, what is the basis on which the judgement is made – are there supporting studies or surveys which allow a good understanding of how the place ranks alongside others?*

¹ Places considered outstanding/exemplars in wider British or international contexts would obviously be of acquisition quality; the stress laid on national context here is because the **qualifying** level of significance for acquisition is national importance in a Scottish context.

Rarity. In national and international contexts, is the place a rare example of its type? *Is the place of a type rare in a national context, and perhaps common elsewhere? Or is it relatively common nationally, but rare in international terms (eg blanket bog habitat)? For nature conservation sites, is there a significant proportion of the European population of rare and endangered species? Is the judgement of rarity based on reasonably robust survey or is it a matter of informed opinion – if the latter, has all the relevant expert opinion been canvassed? Is it rare because over time the type has always been scarce or unusual, or is it a rare survivor of a once common type which is now endangered, or is it rare for the completeness and quality of its survival?*

Associations. Is the place very strongly associated with a major person, very significant event or important strand of Scottish culture (or with wider internationally important figures or events) in such a way that the place demonstrates an important connection with the person or event? *The importance of the figure or event must first be established, then the strength of the association evaluated and the ability of the place to demonstrate the connection justified. What evidence is there that the place either had an effect on the person or event, or was affected by the association; how much documentary or other evidence is there to support and illuminate the association? For some places the association will be with semi-mythical figures/events, in which case there may be no historical or physical evidence to support the association – in these cases how widely known or celebrated was/is the event/figure and how strong is popular sentiment about the association?*

3. Apply the following indicators/enhancers to broaden the evaluation

Extent/Completeness. For cultural heritage, values are likely to be enhanced by the **completeness** of the survival, eg a house with all its contents and surrounding landscape intact. Similarly, natural heritage values are often increased for large tracts of land of sufficient **extent** to offer protection to significant blocks of habitat.

Undisturbedness/Naturalness. For natural heritage, areas which display a high degree of naturalness and are undisturbed by human activities are usually highly valued.

Diversity. Often diversity is regarded as an enhancer for natural heritage significance; in some cases however it is the restricted range of habitats/species which is the defining characteristic of a place and the basis of its significance.

Authenticity. A tricky concept applied particularly to fabric survival at cultural sites. All fabric is 'authentic' to its time, but generally authenticity as an enhancer of significance means sites with a high degree of original/early fabric surviving free from alterations or overlays of (particularly) the modern era, which is usually felt to be compromising to significance, in the same way that modern landscape features (eg pylons) are held to detract from wild land quality whereas ruinous archaeological sites may not.

Corpus of evidence/study. An in-depth research knowledge of the place is likely to increase a place's value by revealing its full significance, and will certainly increase its value for educational and interpretation purposes. Long periods of continuous monitoring, study or survey can also lend **scientific** value to the place which may well enhance understanding on a national or international scale, eg monitoring seabird numbers on St Kilda.

Threat/Fragility. If the place is of a type already quite rare and is likely to become much rarer, its value will increase, especially if it is vulnerable to degradation without sympathetic management intervention/protection, eg Mar Lodge Estate pinewoods.

Continuity of use/demonstration. Places which have a continuity of use, or land retained under traditional management for many generations, may increase the value of the site, especially if it can continue to be worked/used following acquisition as a demonstration site, eg Robert Smail's Printing Works; some crofting settlements.