

# THE FUTURE OF HISTORIC SCHOOL BUILDINGS MODEL BRIEF

ENGLISH HERITAGE JULY 2005

## 1 Purpose:

- 1.1 This Model Brief has been prepared to accompany the English Heritage position statement '*The Future of Historic School Buildings*' (2005). **It provides guidance for local education authorities and others on how to undertake, commission and administer work to determine the historical significance of schools where a programme of upgrading and renewal is planned.**
- 1.2 The Government and local education authorities are embarking on the biggest investment programme in school buildings for the last 50 years. ***The Future of Historic School Buildings* sets out English Heritage's vision for managing change to historic schools as part of the Government's *Building Schools for the Future* Initiative.**
- 1.3 Whilst English Heritage recognises the need for change it is important that decisions on the future of school buildings are made in an informed and transparent manner based on the best available information. **An assessment of their historical significance will:**
  - Determine the importance of all the schools in the local education authority's property portfolio together with the value of individual schools and particular buildings
  - Distinguish those schools and buildings that are of special importance from those that are of limited value
  - Consider the views of key stakeholder groups
  - Establish priorities for retention
  - Provide guidance on refurbishment, replacement and disposalOnce complete, this information can then be integrated with other evidence in order to inform the management of change and avoid potential difficulties at a later stage in the process.

## 2 Principles:

- 2.1 The Government's *Building Schools for the Future* Initiative was launched in February 2004 and sets out a programme to rebuild or renew every secondary school in England within the next 15 years. **This will transform the appearance of many school buildings which are of considerable historic interest.**
- 2.2 Some schools contain listed buildings or lie within conservation areas, whilst others are included on local authority local lists of historic buildings. **These only represent a small number of the total resource and not all historically significant schools have been formally designated.**

- 2.3 **Many historic schools are highly valued by their local community and in some smaller settlements they are rated second only to the parish church.** Historically, schools were often built of good quality materials, in a distinctive architectural style and occupy a prominent position. They are a familiar part of the local scene and add character to many villages, towns and cities.
- 2.4 **When considering possible options for the refurbishment, extension, replacement or disposal of school buildings it is essential that decisions are shaped by an understanding of their historical significance.** Two methods have been designed to provide this information in a rapid and cost effective manner, and these need to be undertaken at an early stage in the planning process.
- 2.5 **An extensive assessment should be carried out whenever a local education authority is considering options on the future of its property portfolio.** The aim of the assessment is to provide a broad brush appraisal of all the schools within its ownership so that the information can then be integrated with other social, economic and environmental data to shape and inform an emerging renewal strategy.
- 2.6 Once these strategic decisions have been taken **a more detailed intensive assessment may be needed for those individual schools which have been identified as being of historical significance during the extensive appraisal and where a scheme of refurbishment, extension or disposal is being considered.**

### **3 The English Heritage Position:**

- 3.1 Broadly speaking English Heritage must be consulted on:
- **Listed Building Consent applications relating to a Grade I or II\* listed building or for the demolition or partial demolition of a Grade II listed building**
  - **Applications for planning permission for development which affects the setting of a Grade I or II\* listed building and (in some circumstances) for development which affects the character or appearance of a Conservation Area or a Registered Park and Garden**
  - **All applications for Scheduled Monument Consent**
- In Greater London, English Heritage has statutory powers and must be consulted on a wider range of applications.
- 3.2 As a national body, **English Heritage is not able to engage in discussing the future of every historic school;** its role is to offer broader guidance and advice. **Heritage specialists (both historic buildings and archaeological officers) based in local authorities are usually best placed to provide advice on the importance of a particular site.**

- 3.3 Where proposals are likely to have a significant impact on an historic school or its site, **local education authorities, developers and others should always consult local authority heritage specialists before submitting an application.**
- 3.4 When considering possible options for the future of historic schools local education authorities should:
- **Ensure all decisions are based on an informed understanding of their significance**
  - **Examine the entire site including its grounds**
  - **Try to keep the building in educational use**
  - **Encourage adaptation and extension rather than replacement**
  - **Where educational use has been ruled out seek an alternative sympathetic reuse**
  - **Consider all the implications of relocating a school to a new site**
- 3.5 **Where a school is of proven historical or architectural significance, retains its integrity and is valued by the local community English Heritage will favour an approach which promotes its repair, refurbishment and reuse rather than direct replacement.** Where it has been demonstrated that it is not possible to adapt an existing historic school building English Heritage will normally favour its conversion to a new use rather than demolition.
- 3.6 **A model brief for intensive and extensive assessment is set out in Appendix 1.** The brief will enable local education authorities and others to commission and administer work to determine the historical significance of school buildings. Its content should be discussed, amended as appropriate, and agreed with the local authority historic buildings officer, archaeological officer, and if necessary, the English Heritage regional office before appointing a consultant. They will be able to offer professional advice on the use of consultants, the quality of the consultants' project design and monitoring arrangements, and may be able to offer comments on initial drafts of the assessment report.

#### **4 Supporting Information:**

- 4.1 General Sources:
- Clark K 2001 *Informed Conservation: Understanding historic buildings and their landscapes for conservation* (English Heritage)  
Department for Culture, Media and Sport, Office of the Deputy Prime Minister and English Heritage 2003 *Managing Local Authority Heritage Assets*  
Department for Education and Skills 2004 *Transforming Schools: An inspirational guide to remodelling secondary schools*  
English Heritage 2004 *Planning and Development in the Historic Environment: A Charter for English Heritage Advisory Services*  
English Heritage forthcoming *Understanding Historic Buildings: Principles of good recording practice*

Royal Institute of British Architects and the Commission for Architecture and the Built Environment 2004 *21<sup>st</sup> Century Schools: Learning Environments of the Future*

4.2 Historical Sources;

Clay F 1902 *Modern School Buildings. Elementary and Secondary: A Treatise on the Planning, Arrangement, and Fitting of Day and Boarding Schools, having special regard for School Discipline, Organisation and Educational Requirements, with special chapters on the Treatment of Class Rooms, Lighting, Warming, Ventilation, and Sanitation* (London: B T Batsford)

Robson E R 1874 *School Architecture. Being practical remarks on the planning, designing, building and furnishing of school-houses* (Reprinted Leicester 1972)

Saint A 1987 *Towards a Social Architecture: The Role of School Buildings in Post-War England* (New Haven and London: Yale UP)

SAVE 1995 *Breathing New Life into Old Schools*

Seaborne M 1971 *The English School: Its Architecture and Organisation Vol I: 1370-1870* (London: RKP)

Seaborne M and Lowe R 1971 *The English School: Its Architecture and Organisation Vol II: 1870-1970* (London: RKP)

## **A MODEL BRIEF FOR UNDERTAKING AND COMMISSIONING WORK TO ASSESS THE HISTORICAL SIGNIFICANCE OF SCHOOLS**

**ENGLISH HERITAGE JULY 2005**

This Model Brief provides guidance for the extensive and intensive assessment of historic schools where a programme of upgrading and renewal is planned. It will enable local education authorities and others to undertake, commission and administer work to determine the historical significance of schools.

**An extensive assessment should be undertaken at an early stage in the planning process whenever a local education authority is considering options on the future of its property portfolio. The aim of the assessment is to provide a broad brush appraisal of all the schools within its ownership so that the information can be integrated with other social, economic and environmental data to shape and inform an emerging renewal strategy.**

**Once these strategic decisions have been taken a more detailed intensive assessment may be needed for those individual schools which have been identified as being of historical significance during the extensive appraisal and where a scheme of refurbishment, extension or disposal is being considered.**

NOTE: The brief contains advice for both extensive and intensive assessment and depending on the nature of the project those sections which are not relevant should be deleted. The headings are intended to act as a prompt for the commissioning body in providing relevant information. Additional guidance on completing this brief should be sought, wherever possible, from the local authority historic buildings officer, archaeological officer, and if necessary, the English Heritage regional office.

### **1. Introduction**

A non-technical summary setting out the purpose of the (extensive or intensive) assessment and its links with the wider renewal programme. Information should also be given on the author of the brief, organisation, contact details, date and how the project is to be administered.

### **2. Location and description**

**2.1** For an **extensive assessment** it will be necessary to provide a brief description of all the schools that are to be considered together with a map showing their location.

**2.2** For an **intensive assessment** it will be necessary to provide a brief description of the school together with a map showing its location and boundary reproduced at an appropriate scale.

### **3. Planning and Development Context**

An outline account of the renewal programme.

**3.1** For an **extensive assessment** the renewal programme should be in its preliminary stages as the purpose of the assessment is to inform its future development. Reference should be made to any existing information on the strategy and, where appropriate, this should be included in the tender documentation.

**3.2** For an **intensive assessment** the detailed site-specific proposals for the school should be in their preliminary stages as the purpose of the assessment is to inform its future development. Reference should be made to any existing information on the strategy for the site and, where appropriate, this should be included in the tender documentation.

### **4. Historical Overview**

A brief statement on the historical interest of the school(s), providing a summary of the current state of knowledge and gaps in the information base. Any existing statutory and non-statutory designations relating to the school(s) should also be identified.

### **5. Objectives of the Assessment**

**5.1** The aims of the **extensive assessment** are:

- To establish the historical significance of all the schools within the local education authority's property portfolio
- To distinguish those schools and buildings that are of special importance from those that are of limited value
- To discuss the findings with the local education authority, local authority heritage specialists, community groups and other bodies who are directly involved in the renewal programme
- To identify the need for further detailed assessment and recording of historic schools in advance of, and during, any refurbishment, extension, replacement or disposal

**5.2** The aims of the detailed **intensive assessment** are:

- To undertake an external and internal assessment of the historic school and its individual elements
- To determine its sensitivity and capacity to accommodate change
- To identify those buildings and associated features that should be retained during any future refurbishment, extension or disposal
- To put forward a programme for the recording of those elements that are likely to be altered, damaged or destroyed during any future refurbishment, extension or disposal

### **6. Methodology**

**6.1** The consultant is expected to examine all the relevant sources of information that will inform the historical understanding of the school(s). These are likely to include:

- Secondary sources on historic school buildings. Seaborne (1971) provides the standard history on school architecture
- Historic maps, especially large-scale Ordnance Survey maps
- Local Authority Historic Environment Record or Sites and Monuments Record
- National Monuments Record Centre, Swindon
- County Record Office and Local History Library
- Royal Institute of British Architects Library
- *The Buildings of England* ('Pevsner') county and city guides, *Victoria County History*, commercial directories, local histories and other available sources
- Local Authority Building Control Plans which are often held by the Local Authority Planning Department or the Record Office

The Local Education Authority may be able to provide additional material.

**6.2** The completion of **6.1** will inform the ground survey. The consultant should be made aware of security issues and given contact details of how to gain access to the school grounds and buildings. Schools should also be made aware that the assessment is underway and provided with the consultant's name.

**6.2.1** An extensive assessment is a fairly rapid exercise and, in most cases, it will not be necessary to enter individual buildings. A pro-forma assessment sheet approximately three – four pages in length will be prepared for each school and these are intended to lead to an overall report on the nature and significance of the schools within a particular area. Each assessment sheet should contain the following:

- Name of the school
- Location - national grid reference and the name of its administrative district and parish
- Historic Environment Record/Sites and Monuments Record number - where they exist
- National Monument Record number - if it exists
- Statutory Status – Any existing statutory and non-statutory designations relating to the school including local listing
- Date – the date of construction and key phases of alteration
- Description – an analysis of the site and how the different elements relate to each other, its layout, architectural style, materials, the range of building types and dates of alteration. It will often be necessary to consider the relationship of the school to its grounds and the wider

landscape setting. The presence of any below-ground archaeological remains should be noted here

- Completeness and condition – the coherence or integrity of the site and how it has been affected by subsequent loss and change
- Significance – what is important about the school as a whole and its individual parts, and how does it compare with similar buildings of this type, date and function? Those features that detract from its overall significance should be noted as well as those which enhance its value
- Management Recommendations – the sensitivity of the site and its capacity to accommodate change should be described. The key issues that need to be addressed when considering any future refurbishment, extension, replacement or disposal must also be identified
- Requirements for Additional Work – Possible options include the need for a more detailed intensive assessment especially where the school is a good example of its type. For others it might be appropriate to undertake a more substantial record of the school in advance of major change, but in some instances, no further work will be necessary

Each assessment sheet should be accompanied by:

- An Ordnance Survey map extract showing the school and, if necessary, its key elements
- Historical map evidence
- A small number of photographs

**6.2.2** An intensive assessment provides a more detailed external and internal analysis of a particular school which has been identified as being of historical significance during the extensive appraisal and where a scheme of refurbishment, extension or disposal is being considered. When an intensive assessment is being prepared it will always be necessary to undertake an internal inspection.

**6.2.2.1** The assessment is intended to lead to an overall report on the nature and significance of the school and its various elements. It will often be necessary to prepare a site gazetteer which describes separately each building, structure, feature, area and significant boundary or zone of below-ground archaeological potential (all referred to below as an element). The location of each element must be shown on a large scale block plan of the site based on the current Ordnance Survey map extract and reproduced at an appropriate scale. Professional judgement will need to be exercised in compiling the

gazetteer to an appropriate level of detail, but the following should be considered:

- Heritage Asset Number – each individual element will be given a unique number
- Name of the school
- Name of the element
- Location - national grid reference
- Historic Environment Record/Sites and Monuments Record number - where they exist
- National Monument Record number - if it exists
- Statutory Status – Any existing statutory and non-statutory designations relating to the individual element including local listing
- Date – the date of the element
- Description – a brief overview of the element and its relationship with the school, its layout, architectural style, materials, internal configuration, fixtures and fittings, decoration and dates of alteration. Areas of below ground archaeological potential should be recorded as an individual element
- Completeness and condition – the condition and coherence of the element
- Significance – what is important about the element and how does it contribute to the overall significance of the school
- Management Recommendations – the key issues affecting the element and which need to be addressed when considering any future refurbishment, extension or disposal of the school
- At least one photograph of the element

**6.2.2.2** For those buildings with historically significant interiors and listed buildings, in particular, consideration should be given to the preparation of sketch floor plans, additional photography and room data sheets. The sketches can be based on existing plans, where available, and will be useful in understanding the layout of the room and any significant features within it. Room data sheets are a useful way of organising information on a room by room or space by space basis, but professional judgement will be needed on their appropriateness. For each room the data sheet provides brief information on the date, nature, condition and significance of key features including floors, ceilings, walls, doors, windows, fixtures, fittings, etc. Each data sheet should also contain

an overall description of the room, its significance and conservation issues.

**6.3** By examining existing documentation and holding interviews with the local education authority, local authority heritage specialists and other bodies who are directly involved in the renewal strategy, the consultant should seek to establish the possible impact of the emerging strategy on the surviving school(s). If a stakeholder workshop is being held to discuss the wider renewal strategy it may be possible as part of an extensive assessment to take soundings on how others value historic school buildings and why. A list and contact details of the individuals and organisations who are to be consulted should be included within the brief.

## **7. Presentation of the Findings**

The report must be clear, concise and easy to read, well illustrated and bound as an A4 document. It should aim to tell a story in non-technical language. Above all the report should aim to determine the significance of the school(s), its individual elements, establish the priorities for retention and provide guidance on refurbishment, replacement and disposal. In addition to those directly involved in the project copies of the report in both hard and digital format should be sent to the Local Authority Historic Environment Record or Sites and Monuments Record and, subject to any confidentiality restrictions, to the appropriate local studies library and Record Office. Digital copies should be produced on CD-ROM preferably in 'Adobe Acrobat' PDF format.

### **7.1 All reports should contain:**

- Author, organisation and date of issue
- Summary
- Introduction – outlining the reason for the extensive/intensive assessment
- Location and brief description of the school(s) under consideration
- Purpose of the work – an outline account of the renewal programme and the methods employed during the extensive/intensive assessment

#### **7.1.1 For an extensive assessment the following sections are suggested:**

- Historical Development – an overview of the nature and significance of the schools by type, date and specialist function with reference to particular examples and individual elements
- Priorities – the information from the assessment sheets and the interviews (outlined in 6.3 above) should be used to identify those schools that are of major significance, those that in whole or in part are worthy of retention and those that are of little intrinsic value

- Adaptive reuse and recording – a discussion of the key principles that need to be addressed when considering possible options for the future refurbishment, extension, replacement or disposal of the schools. Those requiring further detailed intensive assessment should be identified and guidance given on the recording priorities for historic school buildings within the renewal area
- Bibliography
- Appendices containing the individual site assessment sheets for the schools arranged by type, date or specialist function, a copy of the brief and the approved project design

**7.1.2** For an intensive assessment much of the detailed information will be reproduced in the gazetteer and the report should focus on the nature and significance of the school and its various elements. The following sections are suggested:

- Historical development – an outline of the history of the school derived from historical research, map evidence and observation of the building fabric
- Description – a description of the school, its layout, architectural style, materials, the range of building types, internal configuration, fixtures and fittings, decoration and dates of alteration. It will often be necessary to consider the relationship of the school to its grounds and the wider landscape setting. The presence of any below-ground archaeological remains should be noted here
- Completeness and condition – the condition and coherence of the school and its individual elements with reference to subsequent loss and change
- Significance – what is important about the school as a whole and its individual parts, and how does it compare with similar buildings of this type, date and function? Those features that detract from its overall significance should be noted, as well as those which enhance its value
- Management Recommendations – the sensitivity of the site and its capacity to accommodate change should be described. The key issues that need to be addressed when considering any future refurbishment, extension or disposal should also be identified. The discussion should be informed by the interviews outlined in 6.3 above
- Recommendations for further work – a recording strategy which identifies the need for further research, fabric analysis, measured survey and photography together with guidance on when this level of investigation would be justified
- Bibliography

- Illustrations - a location map, the block plan, historical and interpretative maps, sketch floor plans (where they have been produced) and photographs
- Appendices containing the site gazetteer, room data sheets (where they have been produced), a copy of the brief and the approved project design

## **8. Project Management and Monitoring**

Details of the main contact point for the consultant and further information on how the project is to be managed and monitored must be included in the brief.

## **9. Project Design**

The project team should be headed by a consultant with expertise in the assessment of historic buildings. Other skills that may be required to fulfil the objectives include historical research, architectural history, archaeology, conservation planning and architectural conservation. Details, including the name, qualifications and experience of the lead consultant and all other project personnel should be included within the project design together with details of anticipated outputs, working methods, programming and liaison requirements. It may also be appropriate to ask prospective consultants to include previous examples of their work within the tender.

**The preferred project design should always be discussed and agreed with the local authority historic buildings officer, archaeological officer and, if necessary, the English Heritage regional office before being implemented.**

## **10. Timetable**

It will be necessary to set out key deadlines for completing the project and dates when drafts are to be available.

The project design and costings to be submitted to **[name and contact details]** by **[date]**.

Draft report to be submitted to **[name and contact details]** by **[date]**.

Full report – incorporating any comments – to be submitted to **[name and contact details]** by **[date]**.

## **11. References**

List all the sources that have been used in preparing the brief.

## **12. Publication**

The work arising from these assessments will usually amount to the most thorough examination of the schools within a particular area ever undertaken and consideration should be given to the wider dissemination of the information. A leaflet or popular booklet setting out the importance and interest of local schools, will help in explaining the local education authority's approach to their conservation to the wider community. A decision on dissemination may only be possible

once the programme of extensive and intensive assessment has been completed and guidance should be sought from the local authority historic buildings officer, archaeological officer and, if necessary, the English Heritage regional office.