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HISTORIC
BUILDINGS & PLACES



Defining and Reporting Historic Buildings and Places' Casework Impacts

By:

Michael D'Angelo

Frederick Smith IV

Edward Song

Cameron Vesey

6 March 2025

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An Interactive Qualifying Project

Submitted to the Faculty of

WORCESTER POLYTECHNIC INSTITUTE

in partial fulfilment of the requirements for the

degree of Bachelor of Science

by

Michael D'Angelo

Frederick Smith IV

Edward Song

Cameron Vesey

Date:

6 March 2025

Report Submitted to:

Ross Anthony and Liz Powers

Historic Buildings & Places

Professors Chrys Demetry and Richard Vaz

Worcester Polytechnic Institute

This report represents the work of WPI undergraduate students submitted to the faculty as evidence of completion of a degree requirement. WPI routinely publishes these reports on its website without editorial or peer review. For more information about the projects program at WPI, please see <https://www.wpi.edu/project-based-learning/project-based-education>.

Abstract

Historic Buildings and Places (HB&P), a National Amenity Society in London, provides expert consultation on heritage conservation across England and Wales. Limited resources make it challenging to assess and communicate their impact. This project developed sustainable methods to evaluate HB&P's contributions using data-driven tools. Interviews with Planning Officers identified how HB&P's advice supports local conservation and informed an online questionnaire for ongoing feedback. We also created Excel-based tools to analyse change-of-use casework, tracking planning trends and heritage outcomes. These tools could strengthen HB&P's ability to assess its support and advocate for policy changes. We recommended the continued use of these tools and the questionnaire to enhance impact reporting.

Keywords: Change of Use Analysis, Heritage Conservation, Impact Assessment, Local Planning Authority (LPA), National Amenity Society (NAS)

Acknowledgements

We would first like to thank our two advisors, Professors Chrys Demetry and Rick Vaz. Their feedback on our report, research, and presentation was instrumental in this project's timely completion.

We would also like to thank our hosts, Ross Anthony, Liz Powers, and Stefanie Turza at Historic Buildings and Places. Without their aid in getting in contact with the LPA officers, our project would not have been possible.

We would also like to thank the five LPA Officers we interviewed who will remain unnamed for the sake of their anonymity. Their input was paramount in generating future recommendations for Historic Buildings and Places.

Lastly, we would like to thank the Director of the London Project Centre, Dominic Golding, for making this collaboration with Historic Buildings and Places possible.

Executive Summary

Historic buildings have long played a crucial role in the social life of communities, serving as spaces where people gather and interact. Many everyday public spaces, such as marketplaces, pubs, town halls, and places of worship, have historic origins and continue to function as important social infrastructure. Such everyday heritage makes up about 92% of all listed historic sites in the UK. Redevelopment pressures often put this heritage at risk. Laws and policies in England and Wales aim to ensure that heritage conservation goals are considered when changes are proposed to listed buildings. In England and Wales, proposals to alter or demolish listed buildings must be submitted to Local Planning Authorities (LPAs), who make final decisions considering conservation goals with social, environmental, and economic impacts. In the decision-making process, they consult with heritage statutory groups specialising in heritage conservation. These include National Amenity Societies (NAS), such as Historic Buildings and Places (HB&P), which provide expert advice on proposed changes, issuing letters of support, objection, or advice on heritage-sensitive development. However, for heritage statutory groups like HB&P to effectively advocate for sustainable adaption, they need to clearly demonstrate their impact to meet the expectations of funders who seek measurable outcomes. Currently, HB&P struggles to systematically analyse and communicate their contributions to application outcomes. A previous study (Blake et al., 2024) identified keyways to define impact, including geographic distribution of casework, effects on case outcomes, and assistance to communities. Building on this foundation, this project explores methods to evaluate HB&P's contributions and develop tools to support data collection for ongoing impact assessment. The goal of this project was to develop sustainable methods for collecting the information necessary to produce impact assessments that highlight HB&P's contributions at the community level. To complete this goal, we pursued the three following objectives:

1. Develop a system for analysing trends within the change of use casework that illustrates the types of changes that HB&P is supporting.
2. Conduct a qualitative analysis of the impact of HB&P's casework on community stakeholders and application outcomes.
3. Recommend feasible methods for HB&P staff to collect and manage both types of impact data moving forward.

Analysis of Change of Use Casework

Case officers at HB&P often have an anecdotal sense of trends in Change of Use (CoU) casework, but do not have quantitative data to confirm those trends. Evidence of particular patterns in adaptive reuse of listed buildings in England and Wales could assist in their efforts to further convey their contributions within the heritage sector and to influence government policy. We created an Excel spreadsheet of CoU casework, added data fields for current and proposed uses of buildings, and explored questions of interest to HB&P caseworkers, such as the following:

- What are the regional distributions of HB&P's CoU casework between England and Wales?
- What new uses are being proposed for listed buildings across England and Wales?
- Which types of buildings are most often undergoing Change of Use in different regions of England and Wales?

Following are example findings relating to these questions of interest using the Excel system to analyse Change of Use casework from 2022-2025:

HB&P's casework during this period was well distributed across England and Wales, with notable support in Wales and the Northwest of England as conveyed within Figure 1. Of the 362 Change of Use cases consulted on, England accounted for 83% of consultations and Wales 17%, while the Northwest of England made up 19%, slightly surpassing Wales. As HB&P seeks to diversify its coverage, these distributions highlight opportunities to extend support to underrepresented regions while ensuring a balanced national impact.

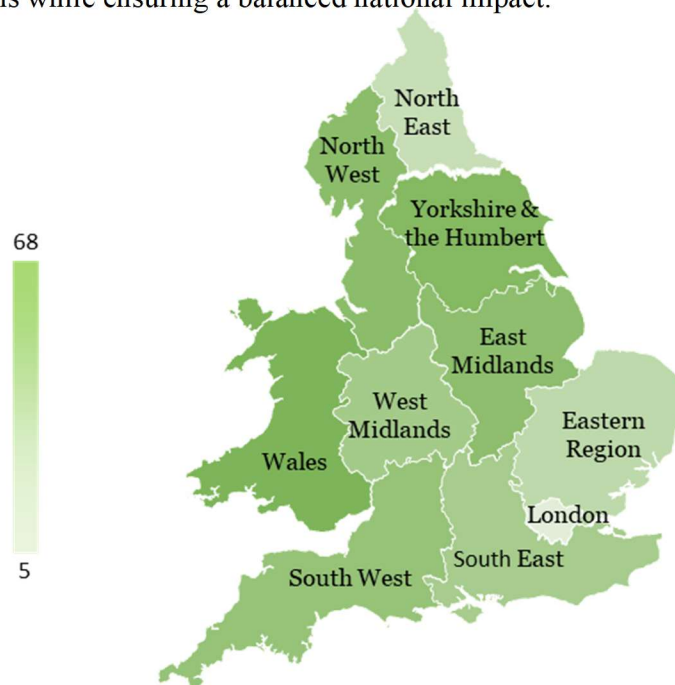


Figure 1. Heatmap of HB&P's Change of Use consultations from 2022-2025

Change of Use casework in both England and Wales showed an emphasis on adapting historic structures for residential purposes, illustrated within Figure 2. With 70% of cases from 2022 to 2025 proposing residential conversions—65% in Wales— this suggests that adaptive reuse has grown to be essential in balancing heritage conservation with housing demands. HB&P can leverage these findings to advocate for uniform, systematic policies across both planning contexts that integrate historic buildings into modern development while preserving their significance.

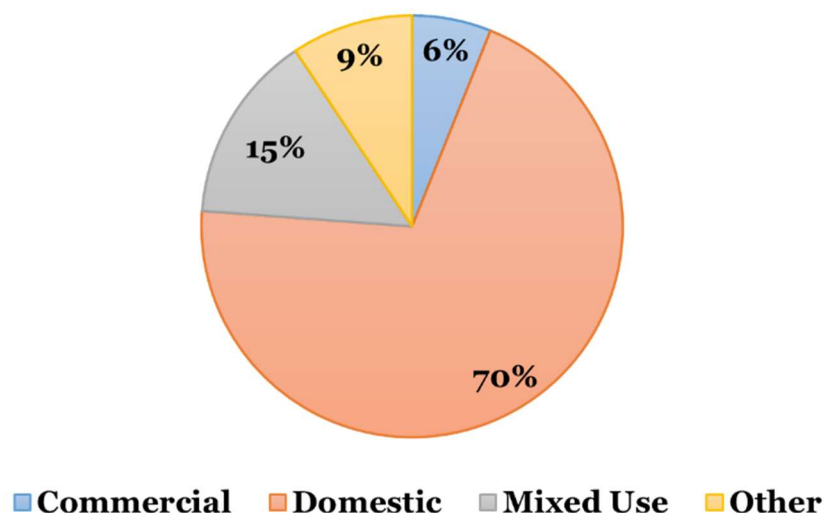


Figure 2. Distributions of proposed uses of buildings within HB&P's English CoU casework (2022-2025)

A high proportion of HB&P's Change of Use casework in Wales was proposed conversions of religious buildings, comprising 47% of cases, as shown in Figure 3. This concentration may be linked to differences in Ecclesiastical Exemption regulations, as major denominations in England can bypass listed building consent while Wales imposes stricter requirements, particularly on Nonconformist chapels. This regulatory contrast suggests a potential influence on the volume of formal CoU applications in Wales, presenting an opportunity for HB&P to highlight these trends to policymakers when advocating for clearer and more consistent heritage protections.

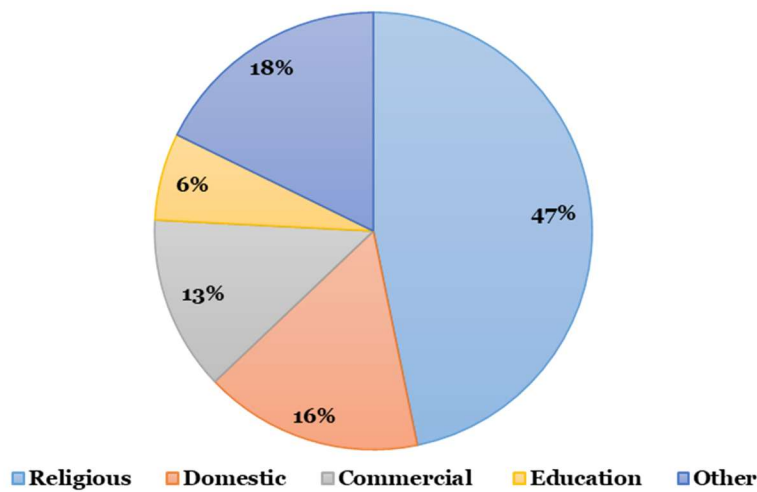


Figure 3. Distributions of current uses within HB&P's Welsh CoU casework (2022-2025)

To help sustain this type of casework analysis in the future, we set up pivot tables and graphs in Excel that will automatically populate when new cases are added. We also created manuals and procedures for HB&P staff that explain how to do the following:

- Maintain the change of use casework database in Excel and continue to populate the new data fields using drop-down menus
- Use data analytics including pivot tables, bar graphs, and pie charts
- Utilise an online tool called Power-User for heat-mapping, and the county converter that we developed to populate heatmaps based on counties within England

Impacts at the Community Level

We conducted interviews with five Local Planning Authority Officers from planning councils in different regions of England and Wales. The format of these interviews was semi-structured virtual meetings that lasted roughly 20-30 minutes. We focused the interviews on the following research questions:

1. What are the Local Planning Officers current perceptions of National Amenity Societies in the planning-decision process?
2. What is the level of interaction between Local Planning Officers and National Amenity Societies?
3. To what extent do National Amenity Societies affect the outcomes of planning decisions across different Plannings/regions?

4. Are there any ways in which HB&P and other National Amenity Societies can improve their efforts within the planning-decision process?

We grouped insights from the interviews into four categories: the role and effectiveness of National Amenity Societies (NAS), community engagement in heritage conservation, HB&P's impact on planning decisions and outcomes, and areas for HB&P's improvement. We will explain a major theme from each category (see Figure 4).

NAS reinforce LPA decisions and add value in supporting conservation arguments. Input provides external validation for LPA Officers to justify decisions when facing challenges from developers (Figure 4). However, two officers also noted concerns about redundancy when multiple NAS groups submit nearly identical responses, raising questions about resource allocation.

Communities value heritage but remain passive in conservation efforts. While many residents appreciate historical sites, their involvement fluctuates. Some communities actively participate in consultations while others only engage when they are directly affected. Following up on these points, three officers also emphasised the need for stronger public education initiatives to promote long-term conservation engagement throughout different communities.

Consistent and detailed feedback from HB&P strengthens applications, particularly through advisory letters that LPA Officers can use as supporting evidence. Officers noted that HB&P's responses provide applicants with structured conservation-focused feedback that can help refine proposals and align them with heritage policies. This role enhances the clarity and effectiveness of planning submissions.

Unclear specialisation of expertise limits HB&P's distinctiveness. Unlike other NAS such as the Victorian Society or the Georgian group, which focus on specific architectural periods, HB&P does not have a clearly defined niche. This gap can make it difficult for officers to determine to what specific cases HB&P's input is most applicable which also leads to redundant responses alongside other NAS groups. Establishing clearer focus could enhance HB&P's ability to provide more targeted contributions in planning consultations.

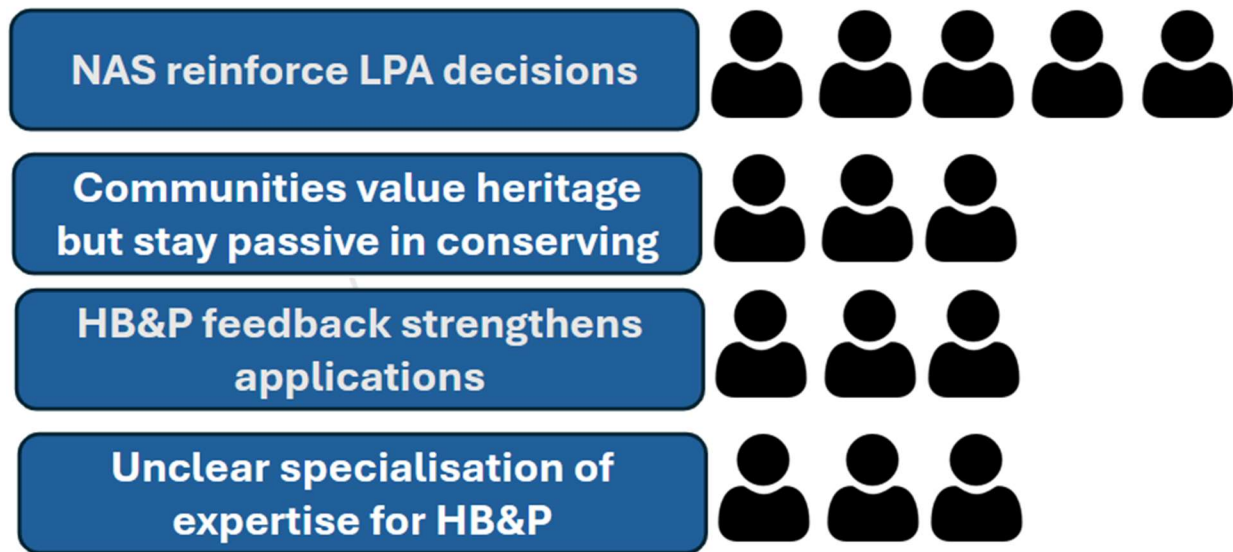


Figure 4. Themes in LPA Officers' Responses (Shaded icons represent the number of LPA officers who mentioned each statement)

With the feedback from LPA officers, we have generated two different recommendations for HB&P:

1. Getting more involved in the Pre-Application process to distinguish themselves as a key consulting body and reinforcing their role in the early planning decisions
2. Collaborating more with JCNAS members to coordinate responses to casework to provide a balanced distribution of consultations to planning applications.

Distributing a Questionnaire to LPA Officers to Collect Future Qualitative Data

For our final deliverable, we focused on ensuring that HB&P can continue collecting the similar type of qualitative data from LPA officers as in our interviews, but in a more hands-off manner that minimises strain on staff. We recommend that HB&P distributes a questionnaire to LPA officers who have been provided with consultations on more than three cases in the given year. This questionnaire should be distributed once a year, ideally before the September reporting period, allowing HB&P to gather feedback on the impact of their casework and how to improve their consultation procedures to support community needs.

Authorship

Section	Primary Author(s)	Primary Editor(s)
Abstract	Cameron Vesey	Michael D’Angelo
Acknowledgments	Michael D’Angelo	All
ES: Background	Michael D’Angelo	All
ES: Methods	Cameron Vesey	All
ES: Findings & Recommendations	Edward Song	All
1.Introduction	Frederick Smith IV	Michael D’Angelo
2.Background Intro	Frederick Smith IV	All
2.1	Cameron Vesey	All
2.2	Frederick Smith IV, Cameron Vesey	All
2.2.1	Frederick Smith IV, Cameron Vesey	Edward Song
2.2.2	Frederick Smith IV, Cameron Vesey	Cameron Vesey
2.2.3	Frederick Smith IV, Cameron Vesey	All
2.3/2.3.1/2.3.2	Edward Song	All
2.3.3	Cameron Vesey	All
2.4/2.4.1	Frederick Smith IV	All
2.4.2/2.4.3	Michael D’Angelo	All
2.4.4	Michael D’Angelo	Frederick Smith IV
3.Methodology Intro	Frederick Smith IV	All
3.1	Cameron Vesey	Frederick Smith IV
3.2	Edward Song	All
3.3	Cameron Vesey	All
4.Findings Intro	Edward Song	All
4.1	Frederick Smith IV, Michael D’Angelo	Edward Song

4.2	Frederick Smith IV	Edward Song
4.3	Frederick Smith IV, Michael D'Angelo	Edward Song
4.4	Edward Song	All
4.5	Frederick Smith IV	All
5.Recommendations Intro	Cameron Vesey	All
5.1	Cameron Vesey	Cameron Vesey
5.2	Cameron Vesey	All
5.3	Cameron Vesey	Michael D'Angelo, Frederick Smith IV
5.4	Cameron Vesey, Frederick Smith IV	Michael D'Angelo

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1. Introduction

Although many people think of heritage sites as famous landmarks such as Buckingham Palace, they also include everyday places such as the Gloucester Malthouse, a 19th-century inland port now being restored for agricultural use. Heritage sites, whether famous or not, preserve a country's cultural, social, and economic traditions. They connect modern society with its past and provide a sense of continuity and solidarity in challenging times (Historic England, 2024). Within England and Wales, these ordinary buildings and places are called *everyday heritage*, reflecting their role in shaping community identity. Everyday heritage constitutes a significant portion of the United Kingdom's built environment, accounting for 92% of all nationally listed historic sites (Historic England, n.d.).

Everyday heritage faces increased vulnerability from societal changes in an evolving world, often becoming the subject of debate regarding whether to preserve, demolish, or repurpose these sites (Historic England, 2024). Decisions about their future are complex, shaped by planning policy frameworks in England and Wales, as well as the efforts of key organisations. Historic England—the government's advisor on the historic environment—provides expert guidance on heritage policy, while local planning authorities ensure adherence to these guidelines. The Joint Committee of National Amenity Societies (JCNAS), a coalition of voluntary heritage organisations, advocates for careful conservation and offers specialist advice to help protect heritage sites. Through ongoing engagement, JCNAS offers expert guidance on proposals, supports both applicants and planning authorities, and ensures that conservation remains a priority in planning decisions. Among its active members is Historic Buildings and Places (HB&P), a London-based organisation dedicated to conserving everyday heritage through consultation and educational outreach, promoting sustainable approaches that prioritise community initiatives in decision-making. Through detailed consultations on a wide range of cases, HB&P provides advice on changes to historic sites, helping to align them with national policies while considering modern conservation needs.

Impact assessments are essential for heritage statutory groups like HB&P to navigate operational challenges and demonstrate accountability in heritage conservation. However, limited staff and the lack of a data management system make it difficult to track and assess the full impact of their work. As a result, providing measurable outcomes to government grant bodies and trustees—who increasingly demand evidence of effectiveness—remains a challenge (Blake et al., 2024). A feasible system for impact assessment would offer HB&P a means to strengthen their credibility, attract

funding, and advocate for policy adjustments that support the long-term conservation of everyday heritage.

A team of Worcester Polytechnic Institute student researchers previously collaborated with HB&P to establish a foundation for impact assessment (Blake et al., 2024). Their work focused on defining relevant impact indicators, developing an initial data management system, and identifying emerging trends within HB&P's casework. As a next step, they recommended developing processes for more in-depth analyses of Change of Use casework. In addition, they recognised that feedback from community stakeholders such as Local Planning Authorities is an important element of impact assessment. A thorough investigation into these sources of impact data would provide HB&P with valuable insights to strengthen their case for funding by demonstrating the effectiveness of their work and their level of support within planning decision processes.

As such, our goal was to develop sustainable methods for collecting the information necessary to produce impact assessments that highlight HB&P's contributions at the community level. To accomplish that goal, we pursued the following objectives:

1. Develop a system for analysing trends within change of use casework that illustrate the types of changes that HB&P is supporting
2. Conduct a qualitative analysis of the impact of HB&P casework on community stakeholders and application outcomes.
3. Recommend feasible methods for HB&P staff to collect and manage both types of impact data moving forward.

2. Background

Within this chapter, we will first establish the importance of heritage sites and historic buildings, particularly within England and Wales. The chapter then shifts to discuss emerging social trends that complicate conservation efforts. We introduce the levels of statutory protection these sites are offered to maintain their sustained use. Our particular focus will be on Historic Buildings and Places (HB&P)—a recognised National Amenity Society (NAS)—analysing their current role and responsibilities in supporting heritage conservation. We close by highlighting the importance for NAS such as HB&P to establish a sound data collection and reporting system to create greater awareness of their activities and impact.

2.1 Benefits of Historical Buildings Across England and Wales

In this section, we will give an overview of the importance of heritage through the value that communities place on historic buildings and architecture. After presenting some overarching context into the enriching aspects of built heritage, we'll discuss their importance within England and Wales on a cultural, economic and social scale.

Heritage is the legacy of both physical artifacts and intangible attributes inherited from past generations, representing the ideals, values, and cultural distinctiveness of societies (Central European University, n.d.). Historical sites are crucial for cultural identity, play a key role in enhancing social capital, fostering creativity, and addressing contemporary challenges. They act as symbols of resilience and diversity, linking the past to the present, and serve as sustainable solutions to preserving knowledge and practices that benefit future generations (European Commission, n.d.).

The United Kingdom's rich history is reflected in its historic buildings, places of worship, gardens, and landscapes, each telling a unique story of the nation's heritage. Conservationists recognise the inherent value of these sites as vital links to the past and integral components of national identity. In England and Wales, this enduring commitment to built heritage has led to the protection of over 370,000 sites in England and 30,000 in Wales, with local communities recognising the cultural, economic, and social significance they hold (Historic England, n.d.). A study by Historic England¹

¹ "Historic England is the government's statutory adviser on the historic environment, championing historic places and helping people to understand, value and care for them." (gov.uk, n.d)

(2023) found that 42% of English residents surveyed believe that historic buildings contribute to their pride in place. Also, 81% view safeguarding historic buildings as personally important, and 89% of residents living in protected buildings believe their home contributes to the local heritage.

Outside of the cultural sector, heritage also contributes significantly to the economic state of the UK. In 2022, Historic England reported that the heritage sector directly contributed £15.32 billion in Gross Value Added (GVA) to England's economy, which is a measure of economic activity. As shown in Figure 5, tourism and other activities related to the heritage sector generated as much economic value as sports and more value than information services. Another positive impact of heritage is job creation across the UK. In 2022, the heritage sector supported 523,000 jobs, including 201,000 through direct employment and many others in supply chain industries that cater to the sector. These jobs span restaurants, hotels, the transportation industry, and businesses that facilitate heritage tourism (Oxford Economics, 2022.)

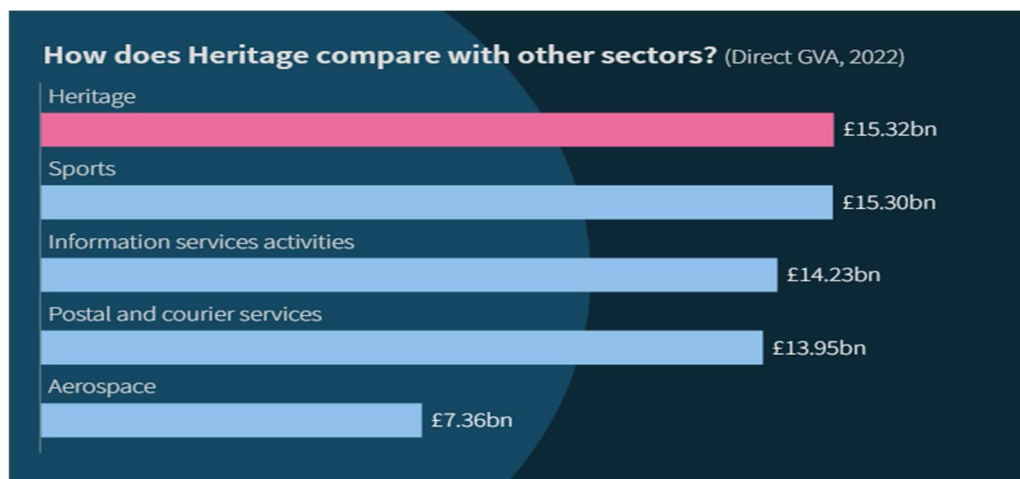


Figure 54. Economic impact (in pounds) of different sectors in England- (Historic England, 2024)

Beyond the cultural and economic benefits that heritage provides within England and Wales, heritage represented within historic sites contributes to the social welfare and capital of local citizens and communities. The presence of historical buildings in England creates opportunities for people to connect and advocate for the conservation of these sites. For example, *SAVE Britain's Heritage* is an organisation established in 1975 to give people an independent voice in fighting for historic buildings at risk by bringing together architects, engineers, planners, and investors (SAVE, n.d.). Along with activism, educational opportunities also support the conservation of historical buildings. Historic England has set up Heritage Schools in response to a government report on cultural education in England (Historic England, n.d.). The curriculum of these heritage schools is designed to foster a

sense of appreciation by helping children develop pride in their local area, understand how their heritage connects to the national story, and engage with local historical context as an integral part of their education. (Historic England, n.d.).

Historic sites have long played a crucial role in the social life of communities, serving as spaces where people gather, interact, and engage with different groups (Warpole & Knox, 2007). Many everyday public spaces, such as marketplaces, pubs, town halls, and places of worship, have historic origins and continue to function as important social infrastructure (Layton & Latham, 2022). Their aesthetics and ambiance make them natural settings for leisure and meetings, reinforcing their role in contemporary social life (Murzyn-Kupisz & Dzialek, 2013).

2.2 Social Forces Impacting Conservation Efforts

This section addresses key challenges and strategies in the conservation and adaption of United Kingdom's built heritage. It begins by examining the impacts of gentrification on historically significant neighbourhoods and how these impacts have reshaped cityscapes. Then we transition into discussing potential benefits and drawbacks in refurbishing and adapting historic sites through retrofitting aims and change of use initiatives.

2.2.1 Heritage at Risk: Impacts of Gentrification on Urban Heritage and Environment

The UK's built heritage serves as an enduring link to collective memory, yet urban transformation—particularly through gentrification—has disrupted this continuity. As Lees et al (2016) describe in *Planetary Gentrification*, gentrification not only shifts land users toward higher socio-economic groups but also drives reinvestment in the built environment, often reshaping the architectural and cultural fabric of historic neighbourhoods. Since the 1990s, large-scale developers and government-led regeneration projects have accelerated these changes, altering the character of historically working-class areas.

London is a city wrestling with tensions between redevelopment, gentrification, and historic conservation. A study conducted on behalf of the UCL Centre for Advanced Spatial Analysis found that boroughs such as Hackney and Tower Hamlets have undergone significant gentrification,

transforming from traditionally working-class and ethnically diverse areas into prime targets for redevelopment and investment. Many of these boroughs are located in London's East End, where the effects of commercial developments have altered the urban fabric, shifted the area's character, and transformed the sense of place (Heritage21, 2022). As Yee and Dennett (2023) observe, these changes are "not isolated but part of a broader pattern affecting multiple boroughs across the city," where rising property values and regeneration projects continue to reshape historic neighbourhoods. Areas once characterised by affordable housing and community-centric spaces are being replaced with luxury apartments, office complexes, and upscale establishments. These on-going transformations have significantly reshaped cityscapes, where historic structures now stand in the shadows of modern high-rises, often losing their visual and cultural prominence.

Redevelopment pressures put ordinary yet historically significant sites at increased risk, despite their formal protections. SAVE Britain's Heritage (2023) reports a rising number of demolition applications, with 100 new buildings added to the at-risk register each year. Additionally, a study by Historic England (2024) shows that demolishing historic buildings for new construction increases embodied emissions by 28-31% compared to renovating them. In contrast, adaptive reuse can reduce overall environmental impacts by 53-75% that would result from new construction, particularly when the main structure and envelope are retained. Therefore, repurposing historic buildings not only preserves their cultural value but also significantly lowers the environmental impact of redevelopment (Historic England, 2024).

2.2.2 Challenges in Refurbishing Historic Buildings

Retrofitting historic buildings is a crucial yet complex challenge in the UK's push for net-zero carbon emissions. Many of these structures, particularly those built before 1919, suffer from poor energy efficiency while requiring conservation of their historical integrity (Panakaduwa et al, 2023). The UK aims to reduce energy consumption in the built environment by approximately 80% within the year 2050, necessitating the retrofitting of approximately 5.9 million buildings, a significant portion of which are listed properties (Panakaduwa et al., 2023).

However, balancing energy efficiency with heritage conservation presents significant technical and financial hurdles. Alabid et al. (2022) highlight the difficulty of integrating modern insulation,

heating, and glazing systems without altering a site's architectural character. The Building Services Research and Information Association (BSRIA, 2025; as cited in Specification Online, 2025) estimates that 20% of UK homes lack adequate insulation, contributing to excessive energy consumption and fuel poverty. In historically protected buildings, rigid planning restrictions often complicate retrofit efforts, as traditional materials and construction methods limit the feasibility of standard energy upgrades (Panakaduwa et al., 2023).

Financial constraints further hinder large-scale retrofitting efforts. Property owners, particularly those in lower-income communities, often struggle with the high upfront costs and extended payback periods associated with heritage retrofits (Alabid et al., 2022). Although a recent study published by the UK's Building Cost Information Services (BCIS) suggests that rehabilitation schemes typically cost about 60% of the price of new construction for similar building types, historic buildings often require skilled labour, specialised materials and further regulatory compliance, driving expenses beyond standard retrofit costs.

Despite these challenges, targeted interventions can help preserve historic sites while enhancing energy efficiency. Putnam and Brown (2021) argue that reversible retrofitting techniques— such as secondary glazing, non-invasive insulation systems, and thermal plasters— offer practical solutions that balance modernisation with conservation. Alabid et al. (2022) further emphasise the need for holistic policy frameworks that includes financial incentives and technical guidance to enable scalable retrofitting efforts while maintaining the cultural and architectural value of historic sites.

2.2.3 Navigating Change of Use: Adapting Historic Buildings with Modern Needs

Navigating a change of use in heritage buildings requires a delicate balance between conserving their historical integrity and adapting to modern needs. While many historic buildings have well-established uses, some require adaptation to ensure their continued relevance and sustainability (SPAB, 2021). Adaptive reuse, or creative repurposing can give new life to these structures, helping them remain functional while maintaining cultural significance. The UK's Levelling Up agenda underscores this approach, positioning cultural investment and creative repurposing as key strategies for revitalising local heritage assets and supporting regeneration.

Navigating a change of use in heritage buildings requires balancing historical integrity with modern needs. While many historic buildings have well-established uses, some require adaptation to remain functional and sustainable (SPAB, 2021). Adaptive reuse, or creative repurposing, helps preserve their cultural significance while meeting contemporary demands. The UK's Levelling Up agenda underscores this approach, prioritising the regeneration of local heritage assets, including town centres and high streets, to support broader revitalisation efforts. Figure 6 highlights successful case studies of this initiative, including Coventry's adaptive reuse of shops on The Burges, Palmer Lane and Hales Street. These restorations have facilitated economic growth within the city along with finding alternative solutions to neglected historic infrastructure (Bristol, 2022).



Figure 6. Notable examples of successful adaptive re-use projects within Coventry as a part of the Levelling Up Agenda (Historic Coventry Trust, 2021).

Adaptive reuse and refurbishment are long-standing practices in England. In the mid-1900s, refurbishment accounted for 42% of the total UK construction output, with domestic housing making up 56% of that refurbishing work (Kincaid, 2002). In more recent years, the demand for housing in historic buildings is growing, as these properties offer unique character and a rarity factor that can translate into premium sale prices (Historic England, 2024). Proximity to a listed building can increase property value by up to 10%, while conservation area locations see a 9% rise (Historic England, 2024). Repurposing underutilised historic sites can also help address housing shortages. For example, Yorkshire and Lancashire's abandoned textile mills alone could provide 42,000 new homes, demonstrating the role of heritage buildings in alleviating development pressures (Historic England, 2024).

Heritage-led regeneration risks gentrification and displacement. While initiatives like Levelling Up drive economic growth, they can commodify heritage into high-end developments (Bristol, 2022). Case studies from Sunderland and Coventry highlight the importance of community involvement to balance historical value and social needs (Bristol, 2022). Sustainable success requires ongoing investment and avoiding "culture-washing," where heritage is exploited for short-term gain without real community benefits (Levelling Up White Paper, 2022).

2.3 Statutory Protection of Heritage in England and Wales

In this section we explain the legal requirements and processes for heritage protection in England and Wales. We begin with an overview of different grade designations for listed buildings and legal requirements for any proposed alterations to these buildings and sites. Groups called Local Planning Authorities (LPAs), and National Amenity Societies (NAS) have statutory roles. After providing some detail on Listed Building Consent applications, we provide more detail on the role of LPAs, how they are legally required to consult with National Amenity Societies, and how those societies access a joint database of Listed Building Consent casework.

2.3.1 Statutory Requirements for Listed Buildings and Listed Building Consent Applications

In the UK, each region has distinct laws and regulations that guide the protection and management of historic sites. In Wales, the Historic Environment Act of 2023, known as CADW, integrates protections and responsibilities under a single piece of legislation, which brings clarity and consistency to the management of Welsh heritage sites. In England, the Planning Act 1990 provides the primary legal structure for the protection of historic buildings and conservation areas across the nation. (Law Commission, 2023).

The Planning Acts in England and Wales led to the establishment of a grading system for listed buildings, designed to classify sites based on their historical and architectural significance. Grade I buildings, representing approximately 2.5% of all listed buildings, are considered of exceptional interest and are afforded the strictest protection. Grade II* buildings are also of significant importance, comprising around 5.8% of listings, while Grade II buildings—the most common

grade—account for the remaining 91.7%, covering buildings considered as “everyday heritage” in the UK (Historic England, 2024). By categorising buildings according to their significance, the grading system provides a structured approach to heritage management and ensures that resources are allocated appropriately and that conservation efforts are organised with a site’s historical importance.

The Listed Building Consent (LBC) process is designed to ensure the protection of historically significant buildings and graded sites in the UK. Managed by Historic England, the National Heritage List for England (NHLE) catalogues all buildings of national importance (Historic England, n.d.). Once a building is listed, any proposed demolition or alterations that involve any form of demolition must undergo a formal approval process. This approval is crucial to conserving the integrity of the building and ensuring that its historical value is maintained. The LBC application process, illustrated in Figure 7, follows a standard planning form, but the specific details required vary depending on the proposed work—whether it is a demolition, renovation, or change of use (Planning Portal, 2025):

- Demolition: If demolition is proposed, justification must be provided, explaining why the building cannot be conserved. For instance, buildings like St Elisabeth's Church and Mellish Road Methodist Chapel faced demolition due to severe structural issues that made repair or restoration impossible (Lewes Bonfire Celebrations, 2015).
- Renovation: Renovation proposals focus on conserving key historical elements, such as original materials and architectural features. The goal is to update the building while maintaining its cultural and historical value.
- Change of Use: When changing the use of a listed building, applicants must explain how the new purpose supports heritage conservation. For example, converting an industrial building to residential use may require adjustments that ensure the building's historical integrity is respected while accommodating modern needs.

Listed Building Consent Application and Decision Process

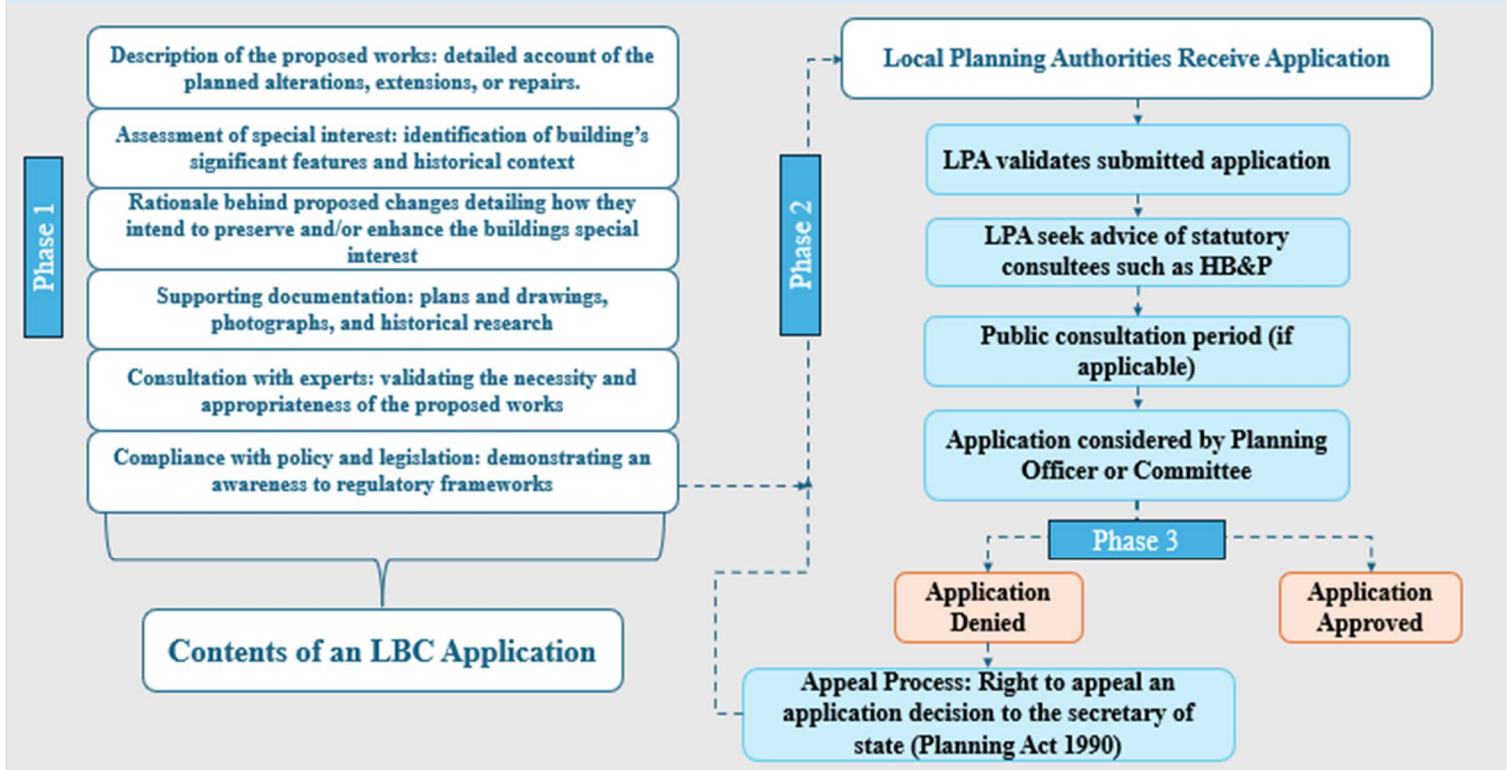


Figure 7. Flowchart of LBC Application and Decision Process

Another type of application is for planning permissions, which is a legal requirement in the UK that addresses the broader framework of legal approval. It is necessary for new development, including extensions, exterior alterations, or construction projects, whether involving listed buildings or not. While listed building consent focuses specifically on conserving a building's historical and architectural significance, planning permission takes a broader view of development and ensures that projects align with regulations such as those protecting conservation areas or neighbours' "right to light" (JLE Studio, n.d.).

2.3.2 The Role of Local Planning Authorities and Other Community Stakeholders

Local Planning Authorities (LPAs) are public bodies responsible for implementing planning legislation within specific areas (Havering, n.d.). In England, over 300 LPAs, along with 22 in Wales, oversee the management and protection of historic buildings within their jurisdictions (White, 2015). The LPA's primary role is to review proposals and determine whether changes align with both heritage protection frameworks and local policies. They evaluate whether the proposed work would harm the building's historic value and whether that harm can be mitigated (NPPF, n.d.). During the review process, LPAs typically seek input from community stakeholders such as:

- Conservation Officers: Appointed by local authorities, they assess planning applications affecting listed buildings, ensuring sustainable practices are considered in proposed works (IHBC, 2020).
- Parish and Town Councils: Acting as liaisons, they provide community insights and advise LPAs on the impact of development projects on historic sites (National Association of Local Councils, 2025).
- Civic Society Representatives: These organisations advocate for heritage preservation and raise awareness of development's impact on historic buildings along with the surrounding area (Department for Culture, Media and Sport & Nandy, 2024).

2.3.3 The Statutory Role of National Amenity Societies

When Local Planning Authorities review Listed Building Consent applications, they are required by law to consult with a National Amenity Society (NAS). The Joint Council of National Amenity Societies (JCNAS) contains seven charities that offer their expertise to support conservation of historical sites and landscapes. These societies are the Council for British Archaeology (CBA), The Gardens Trust, The Georgian Group, the Society for the Protection of Ancient Buildings (SPAB), The Twentieth Century Society, the Victorian Society, and Historic Buildings and Places. (JCNAS, n.d). The statutory role of these NAS organisations is to supply LPAs with advice and assistance that will conserve the historical value of the site that is in the application. (JCNAS, n.d.). By doing so, LPAs are better able to make informed decisions based on the advice from other conservation experts.

In addition to assisting LPAs in the decision-making process of LBC applications, the JCNAS also works with the UK government and local councils to construct policies that emphasise the conservation of historic buildings (JCNAS, n.d.). In addition, the JCNAS maintains a considerable social presence to help raise awareness and educate property owners and architects about better practices that they can implement into their work to conserve historical sites. (JCNAS, n.d.).

As a service to the JCNAS, the Council for British Archaeology (CBA) hosts the Planning Casework Database, a key resource for all types of planning applications. This public domain database outlines necessary information such as proposal details, the respective authority, and supplemental documents associated with each application number. When new applications are submitted, the database notifies the appropriate NAS organisations, asking for comments and expert advice from JCNAS members

with the best knowledge relevant to each case. This collaborative approach ensures that all NAS organisations can work together to achieve a desirable outcome that balances the historical value of a site with the changing social environment (JCNAS, n.d.).

It is important to note that while many NAS organisations within JCNAS have clear specialisations—such as The Gardens Trust focusing on historic gardens or The Georgian Group concentrating on Georgian period architecture—Historic Buildings and Places (HB&P) does not specialise in a particular type of heritage site. Instead, HB&P holds a broader commitment to the conservation of everyday heritage, supporting historically significant sites that may not fall under niche specialisations (HB&P, n.d.).

2.4 Overview of Historic Buildings and Places

Within this section, we provide an overview of Historic Buildings and Places (HB&P), outlining the organisation's longstanding history, mission, and values towards heritage conservation efforts. We then discuss their key role as a statutory consultee across a diverse range of casework, along with some other outreach initiatives. As a non-profit statutory organisation, HB&P relies on securing funding to continue its work and must effectively demonstrate its impact to maintain support. On that basis, we conclude by discussing the general benefits of impact assessments for non-profits and HB&P's ongoing efforts to define impacts and tailor data collection accordingly to address them.

2.4.1 History, Mission, and Values

Historic Buildings & Places (HB&P), originally founded as the Ancient Monuments Society (AMS) in 1924 by architect John Swarbrick, has a longstanding commitment to the conservation and study of historic structures across the England and Wales. Initially focusing on the northwest of England, AMS expanded its scope nationwide, emphasising the conservation of lesser-known structures vital to England's heritage (AMS, n.d.). In 1968, AMS gained formal recognition as a National Amenity Society, enhancing its role in heritage conservation through legislative efforts. With the adoption of the 1979 Ancient Monuments and Archaeological Areas Act, the term "ancient monuments" became more strongly associated with archaeology, prompting AMS to adapt its focus. In October 2021, the

Society rebranded as Historic Buildings & Places to better reflect its broader interest in heritage conservation.

As one of the UK's seven National Amenity Societies, HB&P plays a key role in conserving and championing historic buildings of any degree, so they remain valued parts of the built environment. Today, HB&P dedicates their work primarily towards safeguarding everyday heritage sites across both England and Wales, focusing on where these historic sites intersect meaningfully with public use (The Past, 2024). They promote aspects of constructive engagement, informed advocacy, and sustainable practices, fostering a sense of place for historic sites within evolving communities.

2.4.2 HB&P Casework and Other Activities

As a statutory consultee, HB&P conducts qualitative reviews of proposals received by LPAs, ensuring that heritage considerations are thoroughly evaluated in planning decisions. This involves assessing key aspects of applications, including Heritage Impact Assessments, site layouts, and other supplemental materials that inform how developments interact with historic assets (HB&P, n.d.). In providing a thorough assessment, HB&P helps promote more comprehensive and well-thought-out schemes that balance conservation with necessary adaptation, preventing harmful alterations that could undermine historic character.

This approach is evident in cases such as the redevelopment proposals for Liverpool Street Station and the former Debenhams store in Taunton reflected in Figure 8. In both instances, HB&P raised concerns over large-scale interventions that risked overwhelming the historic environment. At Liverpool Street Station, the proposed high-rise additions threatened to undermine the character of the Grade II* listed station and its surroundings, setting a precedent for insensitive overdevelopment of protected sites. Similarly, the redevelopment of the former Debenhams store in Taunton posed risks to the town's historic streetscape, with proposals for demolition and large-scale reconstruction failing to respect the established urban form (HB&P, 2024). Through such casework, HB&P reinforces the importance of heritage-sensitive planning, ensuring that development proposals align with historic environments rather than compromising them.



Figure 8. Debenhams Store and Liverpool Street Station, two similar cases in which HB&P assisted in heritage-led conservation efforts (HB&P, 2024)

To assist in these cases, HB&P relies on the Council for British Archaeology's (CBA) Database, which is used by all National Amenity Societies (HB&P, 2024). With only one full-time caseworker, HB&P must selectively engage with cases, prioritising those where heritage significance faces the greatest threat. To ensure balanced involvement, they distribute their efforts across regions, application types, and building categories. This approach allows them to provide input on both large-scale redevelopment and smaller interventions, ensuring heritage considerations are applied consistently (HB&P, n.d.). By maintaining this breadth, HB&P helps safeguard a representative range of historic sites.

Their input comes in the form of letters of advice, objections, or support, which are submitted to the CBA database for LPAs and other stakeholders to review. However, as the CBA database serves as a one-way communication platform, HB&P's letters must be clear, well-evidenced, and actionable to effectively inform planning decisions.

Beyond project-specific consultations, HB&P engages the public and planning authorities in heritage awareness through events and publications. Their educational outreach includes the annual publication of *The Journal of Historic Buildings & Places*, focusing on architectural history and conservation, and the member-exclusive magazine *Heritage Now* which provides news and casework overviews (HB&P, 2024). These works help larger audiences appreciate the importance of heritage conservation in sustainable development practices. Additionally, HB&P

collaborates with other members of JCNAS to share data and best practices to extend their reach across England and Wales.

As HB&P's role and scope of work have expanded, so have their funding needs. They rely on government grants from organisations like Historic England, private donations, and membership dues. However, funding for heritage nonprofits in the UK has declined in recent years. The National Lottery Heritage Fund—a major funding source for the heritage sector that helps supports the operation of NAS groups—declined from £325 million in 2012/13 to £112 million in 2021/22. In this financial climate, HB&P must not only advocate for conservation but also provide clear, data-driven evidence of their impact to sustain funding and ensure the continued protection of everyday heritage.

2.4.3 Efforts to Define and Measure Impact of Casework

Defining desired impacts and measuring success is crucial for any organisation, as it directly informs how they collect and manage data. Clear criteria for success help tailor data collection to reflect specific goals, ensuring that gathered information is relevant and actionable (Sopact, 2024). This approach fosters transparency and accountability. Data-driven insights allow organisations to demonstrate their effectiveness to stakeholders, enhance fundraising strategies, and improve partnerships, ultimately strengthening their capacity to secure funding and drive greater social impact (O’Leary, 2017).

Recognising the benefits of structured impact assessments, HB&P collaborated with a previous student research team from WPI to define the specific impacts most relevant to their organisation. Through interviews with select HB&P trustees, the team identified that trustees viewed HB&P’s impact as reflected in the organisation’s assistance within local planning decisions, a reduction in demolition requests, and improvements in the quality of applications. Survey results from HB&P members—who subscribe to their publications—reinforced heritage conservation priorities, highlighting their emphasis on engagement with non-designated assets and regional casework diversity (Blake et al., 2024).

Building on these insights, the previous research team translated these findings into measurable outcomes that HB&P staff could monitor using readily available resources such as the CBA Planning

Casework Database. One area of focus for data collection was determining whether LPAs followed the advice provided by the organisation (Blake et al., 2024).

This process entailed cross-referencing applications on LPA websites and reviewing decision letters to assess whether HB&P's comments were integrated. By comparing HB&P's recommendations with decision justifications, the team categorised outcomes as "Positive" (full adherence), "Slight Positive" (partial adherence), "Neutral" (no comment from HB&P, inaccessible decision, or unavailable outcome), and "Negative" (no adherence).

Their analysis showed that over the past year, LPAs fully followed HB&P's advice in 44% of cases and partially followed it in 14%, resulting in a 58% overall positive adherence rate (Blake et al., 2024). While this suggests HB&P's input shaped more than half of the cases reviewed, the previous team noted limitations in relying solely on LPA website data. To address this, they recommended site visits and stakeholder interviews to gain deeper qualitative insights into HB&P's impact on planning decisions.

To further address impacts related to HB&P's casework distribution, the team developed an initial casework spreadsheet to capture the organisation's contributions within the heritage sector. This process consisted of extracting cases from the CBA Database that HB&P had consulted on and transferring them to a structured Excel spreadsheet, detailing key attributes such as case type, region, and grade designations (Blake et al., 2024).

To complement these data collection efforts, the team also explored visualisation methods appropriate to HB&P's key audience, ensuring that meaningful trends in their consultations were clearly conveyed. Through interviews with HB&P trustees, clustered column charts emerged as the preferred format for their simplicity and readability, with 83% of trustees favouring them for visualising trends in regional distribution, building types, and application outcomes. Additionally, 66% supported heatmaps for illustrating regional patterns due to their clarity and intuitive design. Based on this feedback, the team developed mock-ups of these visualisations, one of which is shown in Figure 9, demonstrating casework response distributions (Blake et al., 2024).

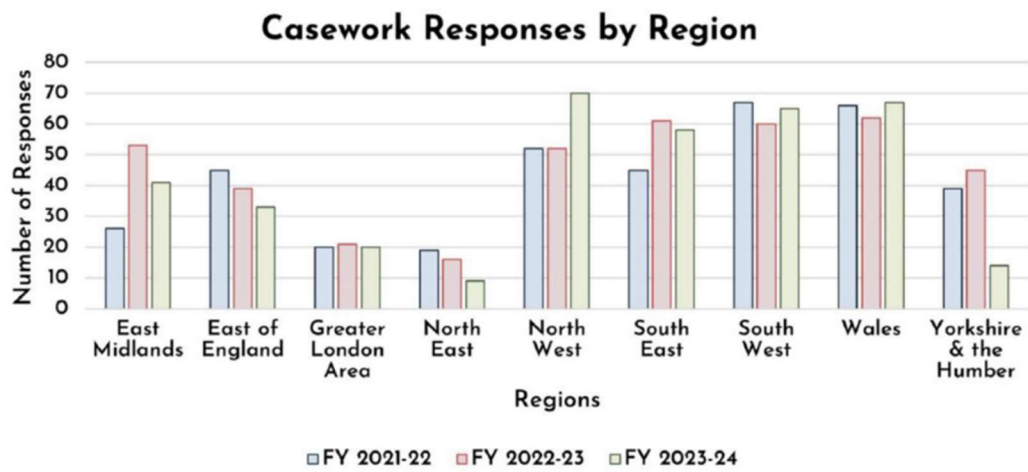


Figure 9. Cluster columns developed from the previous research team to conceptualise HB&P’s regional casework (Blake et al., 2024).

While these efforts established a solid foundation for tracking HB&P’s impact, Change of Use (CoU) casework remained an area for deeper analysis. Trustees emphasised that advocating for the continued use of historic sites is central to HB&P’s mission, yet this aspect of their work had not been considered by the previous team’s data collection efforts (Blake et al., 2024). Expanding CoU analysis to assess case volume, the proposed conversions of heritage assets, and the extent of which HB&P consultations support the long-term functionality of these sites could provide critical insights into HB&P’s involvement in sustainable conservation practices. In addition, targeted visualisations for CoU trends would offer a clearer representation of the types of applications HB&P supports.

3. Methodology

The goal of this project was to develop sustainable methods for collecting the information necessary to produce impact assessments that highlight HB&P's contributions at the community level. To achieve this goal, we pursued the following research objectives:

1. Develop a system for analysing trends within the change of use casework that illustrates the types of changes that HB&P is supporting.
2. Conduct a qualitative analysis of the impact of HB&P's casework on community stakeholders and application outcomes
3. Recommend feasible methods for HB&P staff to collect and manage both types of impact data moving forward.

In this chapter we present the methods used to achieve the project goal and objectives. An overview of the project methodology is shown in Figure 10.

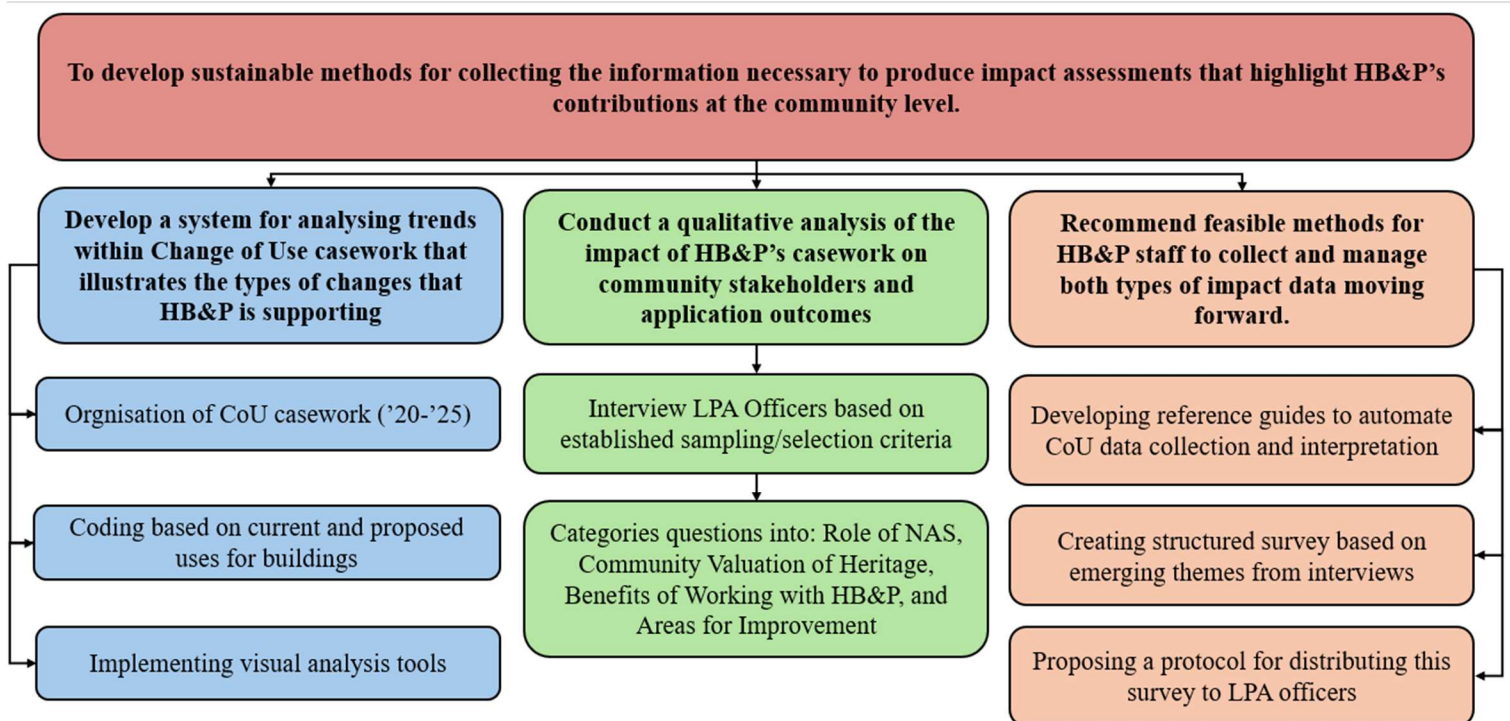


Figure 10. An overview of the project goal, objectives, and methods

3.1: Developing a System for Analysing Trends within Change of Use Casework

Our first objective was to investigate patterns in Change of Use (CoU) casework and how HB&P is supporting these patterns through their consultations. Case Officers at HB&P often have a qualitative sense of trends in CoU casework, but do not have quantitative data to confirm those trends. Evidence of particular patterns in adaptive reuse of listed buildings in England and Wales could assist in their efforts to influence government policy. The following research questions guided this objective:

1. What are the regional distributions of HB&P's CoU casework between England and Wales?
2. What new uses are being proposed for listed buildings across England and Wales?
3. Which types of buildings are most often undergoing Change of Use in different regions of England and Wales?

In this section, we describe the methods used to isolate change of use cases from an aggregated database, categorise the proposals and locations related to change of use applications, and synthesise meaningful results.

The first step that we took was to compile all the Change of Use (CoU) casework data that HB&P consulted on from 2020-2025 into one Excel spreadsheet. HB&P provided us with a work register containing all the cases that HB&P had consulted on going back to 2020. The columns within this Excel sheet included:

- Applications type (Secular or Ecclesiastical)
- Application number
- Site description
- Listed building grade (I, II*, II)
- Proposal (what the plans are for the LBC application)
- Planning council
- Geographic region
- Result of the application (type of comment that HB&P left on the application)
- Which type of activity is being performed to the site (demolition, refurbishment, or Change of Use)

We wanted to investigate CoU cases individually to classify their pre- and post-use. Therefore, we applied a filter built into Excel in the proposal column to sort out all the cases that were classified as CoU.

Once all the CoU data was combined into one workbook, we began by adding data fields for pre- and post-use, using buildings category codes established by JCNAS. Initially, we attempted to provide HB&P with an automated way of classification using AI to simplify the process of data analysis for HB&P. The software that was tested was Zapier, which is a free-to-use software that interprets the prompts supplied to it. However, the AI's algorithm was not capable of analysing the casework descriptions and categorising the functional classes of the building types due to the variability in text descriptions. Therefore, we proceeded with manual data interpretation and entry by developing a simple drop-down system that classified the pre and post uses of building types. Many of the functional classes for each case were found within the proposal column in the work register that contained all cases HB&P comment on going back to 2020. If the description in that column was not sufficient, we also consulted with the CBA public planning database to get further information. After discussing with HB&P caseworkers and reviewing the timeline analysed from the previous student research team, we decided that three years of data (2022-2025) was significant enough to produce meaningful results for HB&P to show their impact. Across this period, HB&P had consulted on 362 CoU cases across England and Wales.

Agriculture	Civil
Commemorative	Commercial
Defence	Domestic
Education	Garden
Health	Industrial
Maritime	Mixed Use
Monument	Recreational
Religious	Transport
Unassigned	Water

Table 1. JCNAS functional classes for the pre-and-post-use of historic sites

After establishing a system to classify the pre and post use of buildings, we then moved to organising the cases by geographic region and county to show the regional distribution of HB&P's CoU casework. We transformed the open-entry Geographic Region field to a fixed drop-down menu to ensure consistent data entry, so that data visualisation tools would populate correct without errors from misspelled regions. After structuring data collection procedures accordingly, we generated automated pivot tables that enable users to specify data fields to analyse such as casework by region, proposed conversions, and time frames. The tables automatically calculate counts and percentages upon new entries into the system, proving a foundation for visualising trends through pie charts and cluster columns.

With each case tied to a specific region, we then generated "heat maps" using Power-user, an Excel extension that enables spatial overlay of quantitative data onto maps. Power-user has a large library of maps to populate, but for the scope of our project we were only concerned with two of the UK maps: UK by region and UK by county.

One limitation of this analysis procedure is that the dataset is for all CoU proposals that HB&P selected to consult on, regardless of whether they were ultimately approved, denied, or resubmitted. Since the constructed database does not include final decisions from Local Planning Authorities, it doesn't capture whether the proposals HB&P advised on ultimately materialised. As a result, the dataset does assess *consultation* trends, but those trends may not correlate with actual CoU outcomes.

3.2: Conducting a Qualitative Analysis of HB&P's Community Impacts

Our second objective was to evaluate the degree of community impacts of HB&P's consultation work. We sought out information related to the level of awareness that community stakeholders have towards HB&P and National Amenity Societies to aid in our future recommendations for the organisation. The reason for choosing LPA Officers as interview targets is because of their level of involvement with both HB&P and community. This would give us insight into both the community perceptions of HB&P, and the perceptions of the LPA Officers themselves. The following research questions guided our interviews with Local Planning Officers:

1. What are the Local Planning Officers' perceptions of consultations provided by HB&P and other National Amenity Societies?

2. What is the level of interaction between Local Planning Officers and HB&P or other National Amenity Societies?
3. To what extent do HB&P and other National Amenity Societies affect the outcomes of planning decisions across different regions?
4. Are there any ways in which HB&P can improve their consultation efforts?

These questions guided our efforts to gain a baseline understanding of HB&P's reputation along with potential areas for improvement. Within this section we describe the methods used to select a sample population for interviews, the structure and logistics of the interviews, along with the analysis procedure for interview responses.

3.2.1 Selection Criteria and Sampling Approach

Ross Anthony, a secular caseworker at HB&P, led the selection of interview participants, prioritising councils that represented a diverse range of geographic areas, socioeconomic demographics, and recent engagement with HB&P consultations. In addition to geographic diversity, the selection process considered the economic profile of these communities. Table 2 outlines key descriptors of the selected councils, including population, number of listed buildings, average property values, and an estimated percentage of households in higher-income social grades. Social grade, a measure of household employment correlated with wealth, is categorised by the Office for National Statistics into four groups:

- AB: Higher and intermediate managerial, administrative, and professional occupations
- C1: Supervisory, clerical, and junior managerial, administrative, and professional occupations
- C2: Skilled manual occupations
- DE: Semi-skilled and unskilled manual occupations; unemployed

In our approach we lumped percentages representing the AB and C1 classes, as this grouping better reflects the presence of high-income and professional residents within the community. To ensure a

sufficient number of responses, the selection process also prioritised councils that were most likely to agree to an interview.

To facilitate open and transparent discussions without concern for political repercussions, we anonymised all participants in our report's findings and refer only to their broader geographic region rather than specific towns. Two of the selected councils were located in Southeast England, while the remaining three were in Yorkshire and Humber, Wales, and the East of England, ensuring representation across multiple planning districts.

	Council 1	Council 2	Council 3	Council 4	Council 5
Population (2021 Census)	120k	72k	130k	155k	200k
Number of Listed Buildings	1650	1880	2200	1800	2200
Average Property Value	£520,000	£236,000	£500,000	£275,000	£178,000
% Combination of Households with C1 & AB Social Grade (2021 Census)	67%	53%	74%	47%	54%

Table 1. Key attributes of each LPA's demographics (ONS, Published in 2023 for 2021)

3.2.2 Interview of Local Planning Authority Officers

Interview Methodology:

To find our interview targets, Ross Anthony initially contacted an officer from each selected region via email to invite participation. We conducted semi-structured interviews with Local Planning Officers who had prior experience engaging with HB&P's advice on applications. This interview format was chosen for its flexibility which allowed exploration of specific planning cases while maintaining consistency in addressing key themes across different regions. Interview questions focused on Planning Officers' awareness of NAS in the planning procedure, community perspectives on heritage, HB&P's distinct role amongst NAS, and addressing any gaps in their performance. Early questions in the interview focused on the NAS to gauge the level of awareness that the LPA Officers had about HB&P. If we were to go straight into questions about HB&P before asking about the NAS, a concern was that some LPA Officers may not have a deep understanding about the role that HB&P plays during consultations. Further specifics about the interview questions can be found in Appendix A.

Logistics of Interviews:

Interviews with Local Planning Officers were conducted entirely online via Microsoft Teams, as this was the most accessible option for participants given that commute times between Central London and selected districts were upwards of two hours, making in-person interviews impractical. Additionally, conducting interviews remotely not only reduced logistical barriers but also increased the likelihood of participation from officers who may have otherwise been unable to contribute due to time constraints.

Invitations to participate were distributed via email one week prior to the scheduled interviews. The email outlined the nature and purpose of the study, being to collect their sentiments and perceptions of the organisation and National Amenity Societies. To ensure transparency and ethical compliance, the email also included a request for audio recording and an attached Interview Consent Form (see Appendix B) detailing participants' right, confidentiality measures, and data handling procedures.

Each interview was structured to last approximately 20–30 minutes. Audio recordings were used to facilitate accurate transcription and analysis, with all data handling and storage strictly adhering to the UK's General Data Protection Regulation (GDPR). The transcription process consisted of Teams meetings being set to automatically audio record and transcribe. After each interview, we accessed

call history and uploaded transcribed text into a Microsoft Word document. We also listened to the audio recording to check the accuracy of the transcription.

3.2.3 Interview Analysis Method

We coded the interview transcripts to identify patterns and categorised them into the following predefined themes:

1. Role and Effectiveness of NAS – Understanding how NAS assists with planning decisions
2. Community Valuation of Heritage – Examining public awareness and perceptions of heritage conservation
3. HB&P's Impact on Decision-Making – assessing how HB&P's advice have influenced decision-making
4. Areas for HB&P to Improve

We manually coded responses by reviewing transcripts and identifying common phrases, arguments, and points of discussion related to these themes. Quotes that exemplified recurring patterns were extracted to illustrate key perspectives. This qualitative coding approach ensured consistency in identifying trends while preserving the richness of individual responses.

Some limitations to mention included the limited geographic representation of community stakeholders that HB&P has interacted with through their casework. For example, a limited representation of Planning Officers within a particular region meant that sentiments regarding NAS we're based on one respondent. Ideally, a stronger representation of Planning Officers within the same local region would better reflect overall sentiments and validate certain themes that emerged from responses. There may also be concerns of bias, as we exclusively interviewed Planning Officers who work frequently with HB&P. Their responses do not necessarily reflect the perspectives of a broader range of Planning Officers who are less familiar with HB&P. To remedy this limitation, the questions relating to areas of improvement were designed to encourage critical reflection rather than solely positive feedback.

3.3 Recommending Feasible Approaches for Future Impact Assessment

After analysing Change of Use casework and conducting interviews with Local Planning Officers, we shifted towards developing recommendations for systems that can sustain this type of data collection and analysis moving forward. For each aspect of impact data, we explored potential models for collecting, communicating and managing the data. We wanted to suggest a data collection system that would:

1. Enable HB&P to easily explore patterns and trends in Change of Use data in the future
2. Capture the range of community impacts revealed in the interviews
3. Be simple and realistic for HB&P to implement given its staffing constraints
4. Position HB&P to work toward issuing periodic impact reports that are typical in the heritage sector

To enable future analysis of trends in Change of Use casework, we developed manuals and reference guides for HB&P to follow so that they can continue utilising the data analytic tools that we created to identify trends within CoU casework in England and Wales. The manuals and reference guides were created by going through each step of the process for generating the different visual aids. In each step, screenshots were taken to show what was taking place in Excel for that step. Also, common issues that we ran into while developing these tools is including in the manuals in case any staff members run into a similar issue.

With the staffing constraints at HB&P, we needed to develop a way for staff to collect the qualitative data that we received during interviews with LPA Officers in a hands-off manner. This why we developed a questionnaire that can be distributed to LPA Officers periodically. The specifics of the questions were based off the responses and common themes we heard from LPA Officers. These responses were taken into consideration when creating the questionnaire. We also used discussions with HB&P staff to weigh choices about survey distribution frequency, timing, and selection criteria for LPA Officers.

4. Findings

In this chapter, we describe emerging patterns in HB&P's Change of Use casework, based on figures generated through automated Excel analysis tools developed by our team. These findings aim to reflect the analytical capabilities of the system used to process casework data. The system was designed to support HB&P in monitoring, interpreting, and communicating the impact of their Change of Use support through data-driven insights. We then analyse the interview responses we received, outlining the key points that came up throughout the interviews.

4.1 Scope and Coverage of HB&P's Change of Use Consultations

Between 2022 and 2025 HB&P has provided consultations across England and Wales, with particular assistance within Northwest England and Wales. In total across this time period, HB&P has consulted on 362 CoU applications across different regions in England and Wales. Figure 11 shows the heat-map distributions of CoU casework across both countries. England received 300 consultations (83%), while Wales received 62 (17%), The Northwest region constituted 19% of CoU consultations across the three-year span, two percentage points higher than CoU consultation cases in Wales.

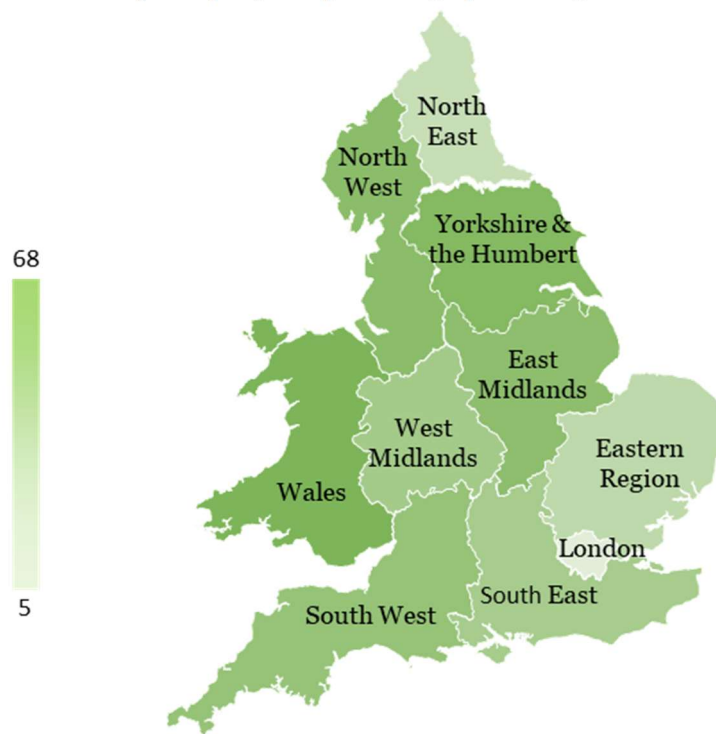


Figure 11. HB&P's Change of Use casework coverage from 2022-2025

HB&P's change of use casework include a broad range of building types. Across England and Wales, commercial buildings received the highest number of responses (77 cases), followed closely by domestic buildings (70 cases) and religious buildings (67 cases). As illustrated in Figure 12, the predominance of commercial and domestic sites suggests that HB&P's concerns for Change of Use frequently involve buildings that remain in active daily use, such as shops, homes, and public-facing spaces. This range of casework demonstrates HB&P's engagement with a diverse set of historic structures, each with unique conservation challenges and regulatory considerations. The substantial representation of religious buildings further reflects the organisation's consideration of both secular and ecclesiastical casework in their consultation approach.

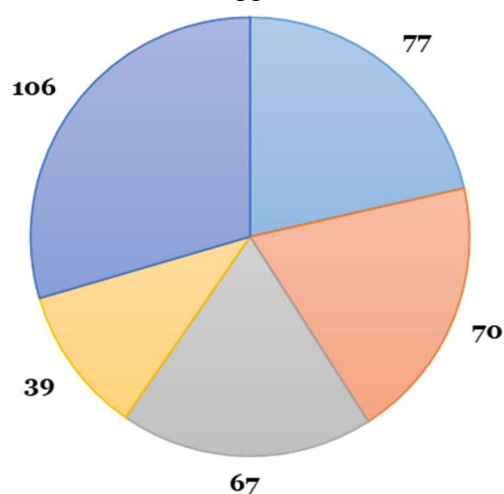
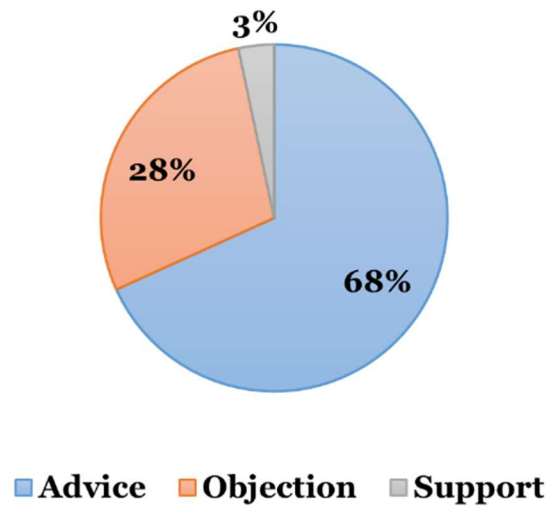


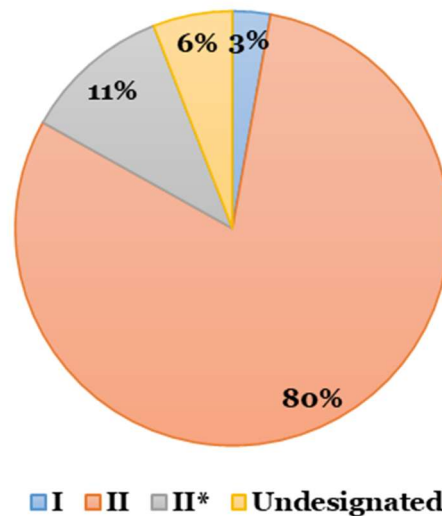
Figure 12. CoU applications in England broken down by initial building type

HB&P primarily operates as an advisory body, favouring guidance over opposition in its consultations. Of all CoU applications that HB&P reviewed, 68% resulted in letters of advice, 28% objections, and 3% in letters of support, as depicted in Figure 13. This distribution reflects HB&P's role in promoting sustainable conservation practices by guiding proposals toward heritage-sensitive solutions rather than resisting change. The relatively low objection rate suggests that most applications align with conservation principles, with HB&P suggesting ways that plans can be refined to support the long-term viability of historic sites. Through this approach, the organisation fosters adaptive reuse and contributes to the idea of heritage buildings continuing to serve communities in a sustainable way.



*Figure 13. Types of Response Provided by HB&P in Change of Use Casework from 2022-2025
(n=362)*

HB&P’s commitment to everyday heritage is further evident in the distribution of CoU applications by listing status. As shown in Figure 14, 80% of Change of Use cases involved Grade II buildings, while 6% concerned undesignated heritage assets. This highlights HB&P’s engagement with heritage sites that, while not always highly protected, are integral to local character and history. The organisation’s casework ensures that these buildings receive heritage-sensitive consideration in planning decisions, aligning with its mission to advocate for a broad and inclusive approach to conservation.



*Figure 14. Grade Breakdown of HB&P Change of Use Casework
from 2022-2025*

4.2 Heritage and Housing: HB&P’s Role in Residential Adaptation and Conservation

HB&P caseworkers often noticed patterns and trends within Change of Use casework, however without quantitative evidence to back up these observations they are merely noted as hunches and nothing more. With proper evidence of these trends, HB&P could use it to influence government policy and achieve important societal outcomes in the heritage sphere. In this section, we show an example of how Change of Use casework can be analysed through conversions of historic buildings for residential use.

A considerable portion of HB&P’s Change of Use casework in England involved proposals for residential use, reflecting broader trends in adaptive reuse and the demand for housing. As shown in Figure 15, 70% of Change of Use cases from 2022 to 2025 entailed proposed domestic uses for existing heritage assets. In response, HB&P issued letters of advice for 64% of these cases, while 34% received objections. This distribution highlights HB&P’s role in facilitating heritage-sensitive residential conversions, advocating for proposals that align with conservation principles while challenging those that may compromise historic integrity. Adaptive reuse for housing not only preserves the historical significance of the site but offers a more environmentally friendly approach than demolition and new construction. By engaging with these cases, HB&P helps promote development practices that ensure historic buildings continue to serve contemporary needs while retaining their historic value.

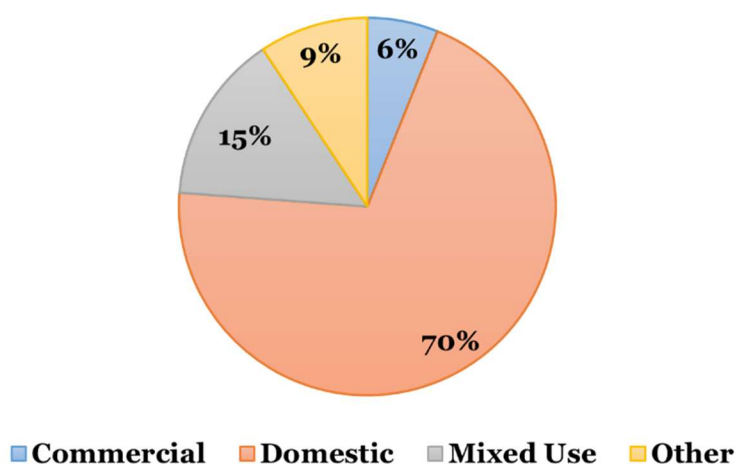


Figure 15. Proposed Uses of HB&P’s English Change of Use Casework from 2022-2025

The regional distribution of Change of Use (CoU) casework involving domestic conversions underscores HB&P's commitment toward heritage-to-housing initiatives. As depicted in Figure 16, the Northwest region accounted for 51 cases involving conversion to domestic/residential use (25%), while Yorkshire accounted for 33 cases (16%). This pattern aligns with significant heritage-to-housing initiatives recently undertaken in these regions, such as the Heritage Works for Housing campaign that has been especially active in the Northwest region, particularly Lancashire (Historic England 2024). As heritage-for-housing initiatives continue to shape these regions, HB&P's prioritisation of these high demand areas' change of use applications reflects its commitment to securing a sustainable future for historic sites while ensuring that redevelopment meets the needs of local communities, providing housing that respects both heritage and liveability.

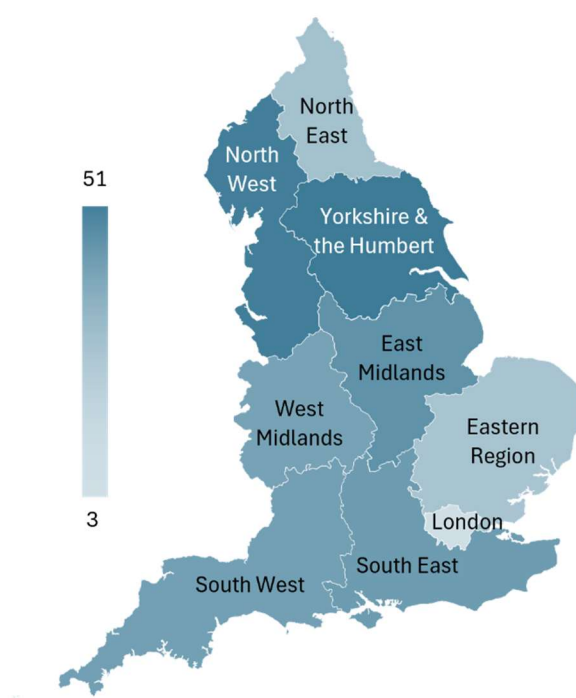


Figure 16. Heatmap of Proposed Domestic CoU Applications in England 2022-2025

Within England, HB&P's casework for Change of Use proposals involving domestic sites shows a consistent distribution of advisory letters and objections across different scenarios. As shown in Figure 17, 69% of consultation responses for conversions into domestic use were letters of advice, compared to 62% for cases involving alterations to existing historic residences. Similarly, objections

were issued at comparable rates (32% and 35%, respectively), highlighting HB&Ps critical stance in ensuring that all residential adaptations align with heritage conservation principles. Applications involving retained domestic use primarily included subdivisions, extensions, and internal alterations, reflecting ongoing efforts to adapt historic housing stock while preserving its character. The similar distribution of advisory letters and objections across different types of applications underscores that each scenario is assessed with the same level of scrutiny, rather than reflecting a predisposition toward either support or opposition.

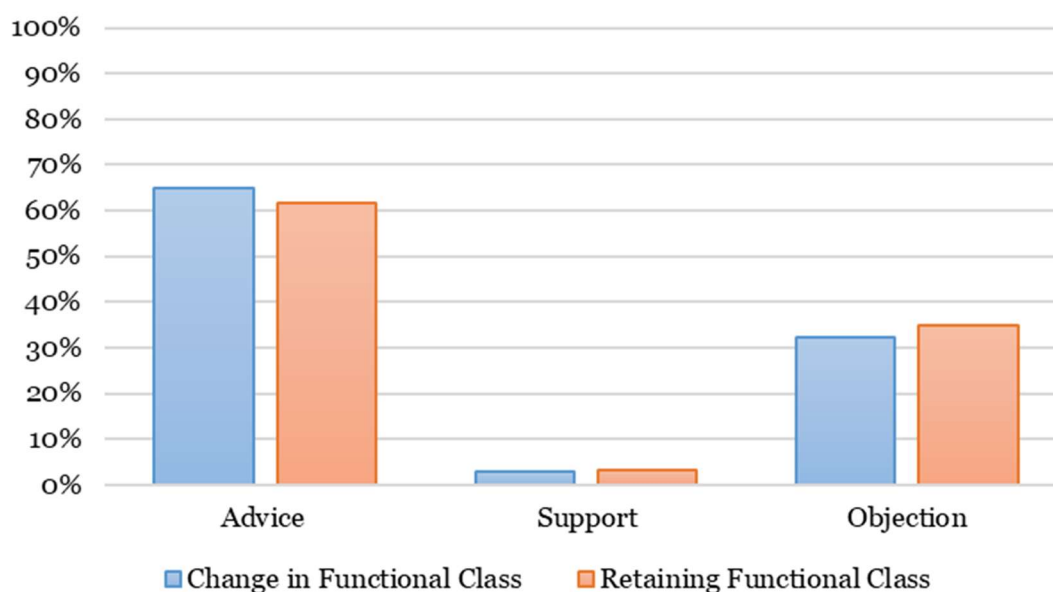


Figure 17. HB&P's responses to proposed domestic use CoU casework in England (2022-2025)

4.3 Dominant Patterns in Prior Uses of Buildings in Welsh Change of Use Applications

In Wales, subtle nuances in government planning policy shape how heritage sites, particularly religious assets, navigate Change of Use application processes. Anecdotally, HB&P caseworkers have observed a significant number of applications involving conversions of religious buildings, raising concerns about the long-term sustainability of these assets. By assessing HB&P's casework within Wales, caseworkers can identify areas where policy may fall short in supporting sustainable practices of these buildings. Recognising these potential gaps enables HB&P to

provide more targeted recommendations and advocate for more holistic policy frameworks that better safeguard Wales’s historic sites.

Between 2022 and 2025, a high proportion of HB&P’s Welsh Change of Use casework was proposed conversions to religious buildings. As shown in Figure 18, religious buildings comprised 47% of all Welsh CoU cases, reflecting a distinct concentration of religious cases over others. A potential factor in this disparity is the variation in Ecclesiastical Exemption regulations between England and Wales. In England, major denominations such as the Church of England, Roman Catholic Church, and Methodist Church benefit from exemption, allowing them to bypass listed building consent for changes, provided they have internal heritage safeguards. In Wales, however, Ecclesiastical Exemption is more limited, primarily covering the Church in Wales, while many other religious buildings—particularly Nonconformist chapels—must go through the full planning process (CadW, 2025). This stricter regulatory framework may increase the number of religious buildings in Wales requiring formal CoU applications, contributing to the higher case volume.

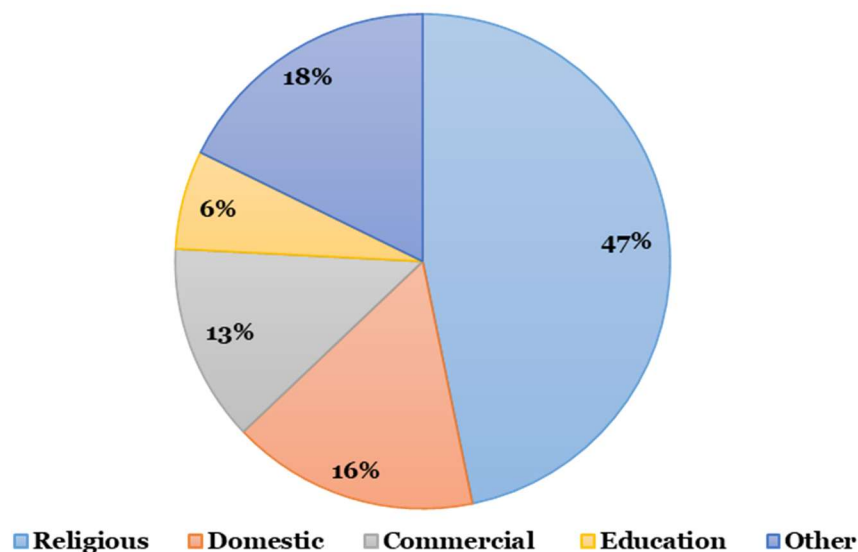


Figure 18. Comparisons of the current classifications of buildings undergoing CoU in Wales

A consistent pattern of domestic conversions emerges in the proposed end uses of heritage assets across England and Wales. As shown in Figure 19, 65% of Change of Use applications in Wales involved conversions to domestic use, closely aligning with the 70% recorded in England. This near overlap suggests a broader tendency for historic buildings to be put forward for residential purposes, reflecting prevailing development pressures and economic drivers that shape heritage

adaptation. The alignment in application trends across regions highlights how the demand for housing and the practicalities of repurposing existing structures continue to influence the ways heritage assets are positioned for new uses.

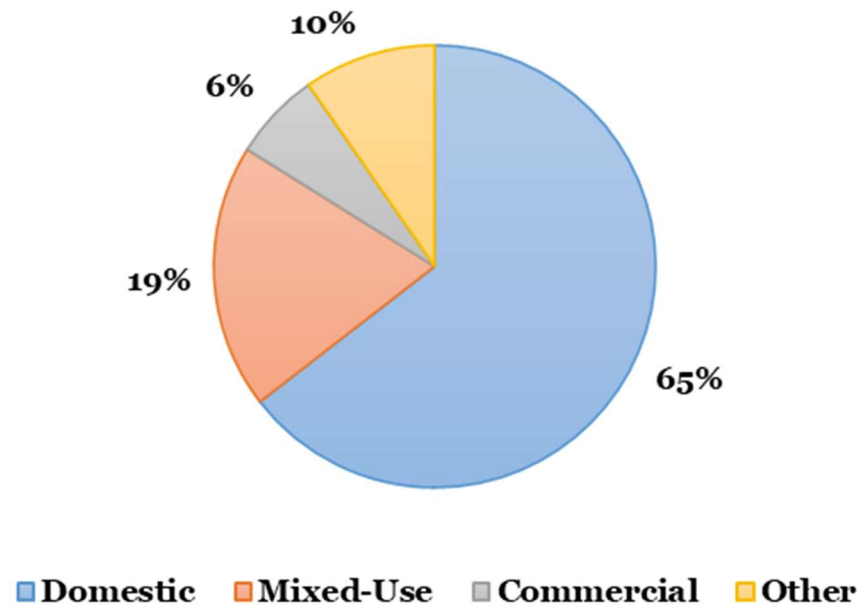


Figure 19. Breakdown of Proposed Use in Welsh Casework

4.4 Assessing Stakeholders' Perceptions and Sentiments Toward HB&P and National Amenity Societies

In this section, we describe several key patterns emerged regarding the role and effectiveness of National Amenity Societies in the planning and conservation process based on our interviews with LPA Officers. The responses noted both the benefits and challenges associated with NAS assistance, illustrating how these organisations back up decision-making.

The common primary themes that emerged from the discussions can be grouped into four categories:

1. The Role and Effectiveness of NAS
2. Community Valuation of Local Heritage
3. HB&P's Impacts on Planning Decisions
4. Areas for HB&P's Improvement

4.4.1. The Role and Effectiveness of National Amenity Societies (NAS)

One of the most common recurring themes was the value that NAS bring in reinforcing LPA Officers' positions on conservation matters. As shown in Figure 20, all five LPA Officers we interviewed expressed that having external validation from a NAS often strengthens their arguments when negotiating with applicants and reinforces their perspectives on planning decisions. One of the officers noted that “having the same comments or same concerns raised by an external body, particularly an amenity society, it can be helpful because it reinforces the points you already raised. [It supports] whoever is making the decision to give greater weight to the concerns that you've identified.” It highlights the broader strategic value of NAS input particularly in situations where LPA Officers may face pushback from developers or local stakeholders. NAS input can amplify concerns that might otherwise be dismissed.

NAS also provide unique insights that LPA Officers might not have considered. Because these organisations review applications with a specialised expertise on historical conservation, they can highlight issues that might have been overlooked by planning authorities. One LPA Officer stated, “[when Amenity] societies really help is where they point out things in a planning application which you might have overlooked because they would have looked in a lot of detail.” This suggests that NAS serve as an additional layer of support, allowing planning authorities to consider historical significance from multiple perspectives. By bringing their niche expertise to specific cases, NAS help ensure that applications are reviewed with comprehensive understanding of conservation principles.

Additionally, NAS organisations often agree with each other, collectively strengthening their arguments. Officers described instances where multiple NAS groups supported the same stance, making it easier for officers to advocate for conservation. However, two LPA Officers also noted that when multiple Amenity Societies provide nearly identical responses, it oftentimes leads to redundancy. While such alignment reinforces key arguments, it may lead to questions about whether all groups are necessary in each case, as their contributions can appear interchangeable rather than distinct.

Following is an explanation of other themes shown in Figure 20

- NAS sometimes conflicts with LPAs. Officers from the East of England and Southeast of England mentioned that, at times, NAS feedback contradicts their own assessments, making it more challenging to determine the best conservation

approach. When disagreements arise, it can slow decision-making and require further discussions to resolve differences.

- NAS face resource constraints. Officers from the East of England and Southeast of England noted that many NAS operate with limited staff and funding, which can result in delays or a lack of responses to planning applications. This resource strain means that NAS are not always able to engage with every case, reducing their potential impact on conservation efforts.
- More beneficial for smaller LPAs. An LPA Officer from the Southeast of England mentioned that NAS support is particularly valuable for LPAs with fewer resources or specialised conservation expertise. Smaller LPAs often rely more on NAS feedback to guide their decisions.
- NAS backing leads to reapplications. One LPA Officer from the Southeast of England observed that applicants sometimes use NAS support to justify reapplying for proposals that were initially rejected. When NAS back a plan, it can encourage developers to refine their applications and resubmit them.

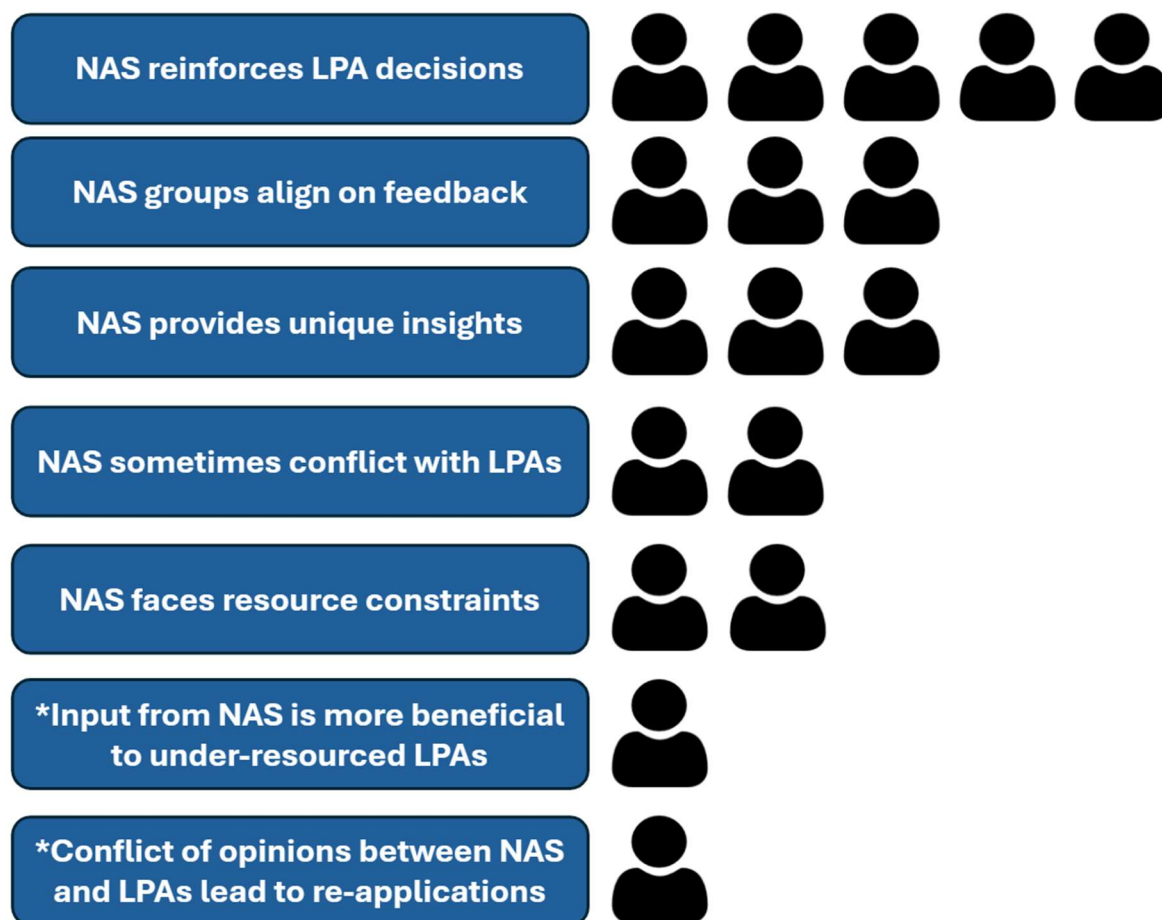


Figure 20. Themes in LPA Officers' Responses about NAS Role and Effectiveness. (Shaded icons represent the number of LPA officers who mentioned each statement; stars represent further elaboration was made)

4.4.2. Community Valuation of Heritage

Officers' views differed on community involvement in heritage conservation (Figure 21). While many communities appreciate historical sites in their region, the level of community engagement in conservation efforts varies significantly. Some LPA Officers noted that public interest tends to fluctuate based on immediate concerns. One LPA Officer explained, "they [community members] like to look at it, but when it comes to affecting them personally and not getting a decision, then they have a very different view on it." This statement suggests that while community members may express general support for heritage preservation, their attitudes can shift when conservation conflicts with personal or economic interests.

Another LPA Officer highlighted the inconsistency of community engagement in public meetings, stating, "some of the meetings have been busy. Others just been dead... So, it's very dependent on where they are." This variability suggests that while some communities may be highly

active in conservation discussions, others may exhibit disengagement depending on local priorities and external pressures. It also implies that conservation efforts could benefit from more outreach strategies that address specific concerns and motivations of different communities.

Education and awareness were also mentioned as areas for improvement. Three LPA Officers observed that while communities recognise the importance of heritage, they do not always understand the best ways to contribute to its conservation. One of the Planning Officers noted, “There’s a lot of work to do in terms of putting forward the importance of educating people.” This suggests that a more proactive approach to public education and engagement could strengthen conservation efforts. By increasing accessibility to conservation knowledge and making it more relatable to everyday concerns, planning authorities and NAS could encourage broader community participation in heritage conservation efforts.

Following is an explanation of other themes shown in Figure 21

- Historic areas foster heritage appreciation. Officers from the Southeast of England, North of England and Wales noted that communities in areas with a rich historical character tend to place a higher value on heritage conservation. In these locations, public engagement is often stronger, and residents are more likely to advocate for protection of historic sites
- Heritage importance varies by region. Officers from the North of England and East of England noted that regional differences influence how communities perceive and engage with heritage. Factors such as economic priorities, development pressures and local history shape the level of public interest in conservation efforts.

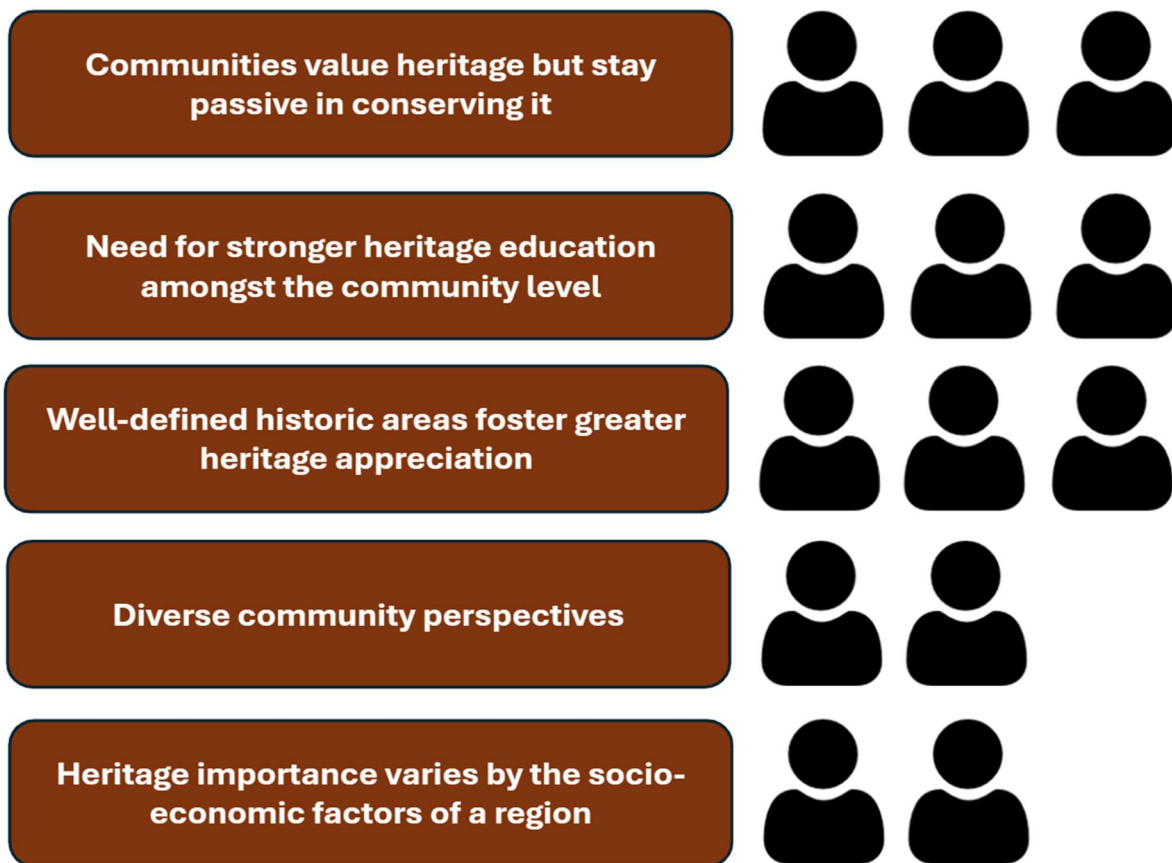


Figure 21. Themes in LPA Officers' Responses about Community Valuation of Heritage. (Shaded icons represent the number of LPA officers who mentioned each statement; stars represent further elaboration was made)

4.4.3 HB&P's Impact on Planning Decisions

LPA Officers generally acknowledged the value of HB&P's contributions to planning decisions but had varying perspectives on HB&P's overall impact. Some viewed HB&P as a reliable and consistent organisation in responding to applications, while others noted that HB&P's influence was sometimes overshadowed by larger statutory bodies like Historic England (Figure 22). Since Historic England has a formal advisory role and legal standing in the planning process, its recommendations often carry greater weight in decision-making. In cases where Historic England's advice differed from HB&P's, LPA Officers indicated that Historic England's position tended to take precedence. Despite this, HB&P was still recognised for providing detailed and well-reasoned feedback that contributed to conservation discussions.

Several LPA Officers from the East of England and Wales drew on specific examples of cases that HB&P had assisted with. One, referring to such a case, observed that “we ended up with a much better scheme in the end because of the purist approach taken by HB&P.” This suggests that HB&P’s expertise and commitment to conservation has tangible effects on planning outcomes, helping proposed projects align more closely with heritage conservation principles. However, some LPA Officers mentioned that a rigid stance may also create friction with planning authorities that need to balance conservation with broader development goals.

HB&P’s role carries notable statutory weight in local decision-making, as their recommendations can influence whether applications proceed. LPA Officers’ comments suggested that “If we go against their advice, we have to approach the Secretary of State. That’s quite powerful, and it means we can give quite a lot of weight to what they’re saying.” This underscores how HB&P’s status as a statutory consultee ensures their input is formally considered, even if their recommendations are not always followed.

HB&P’s influence is felt more strongly in individual casework rather than in shaping broader planning policies. Officers from the North of England and Wales noted that while the organisation is highly responsive to specific planning applications, its engagement at a strategic level is more limited. As one officer explained, “They’re very good at reacting to a planning application that’s been received, but when it comes to dealing with things on a more strategic level, they’re perhaps less engaged, which isn’t surprising due to the legal requirement being to consult NAS on cases related principally to LBC, and you don’t see those levels of applications in a strategic local plan.” Another LPA Officer reinforced this point, stating, “It’s principally Historic England, but I haven’t been aware of an amenity society making any comments on strategic planning documents such as a local plan.” These remarks suggest that while HB&P plays a crucial role in application-based casework, its impact on overarching planning strategies remains minimal.

Following is an explanation of other themes shown in Figure 22:

- HB&P not recognised in specific cases. One LPA Officer from the Southeast of England mentioned that there were instances where HB&P’s involvement in a case was not widely acknowledged. While they contributed to planning discussions, their input was not always directly associated with them, making it difficult to track their impact.
- HB&P refines the quality of project proposals. One Planning Officer from the East of England highlighted that HB&P’s detailed feedback contributed to improving project

proposals. Their expertise helped refine designs and conservation strategies making sure that planning applications aligned more closely with heritage preservation principles.

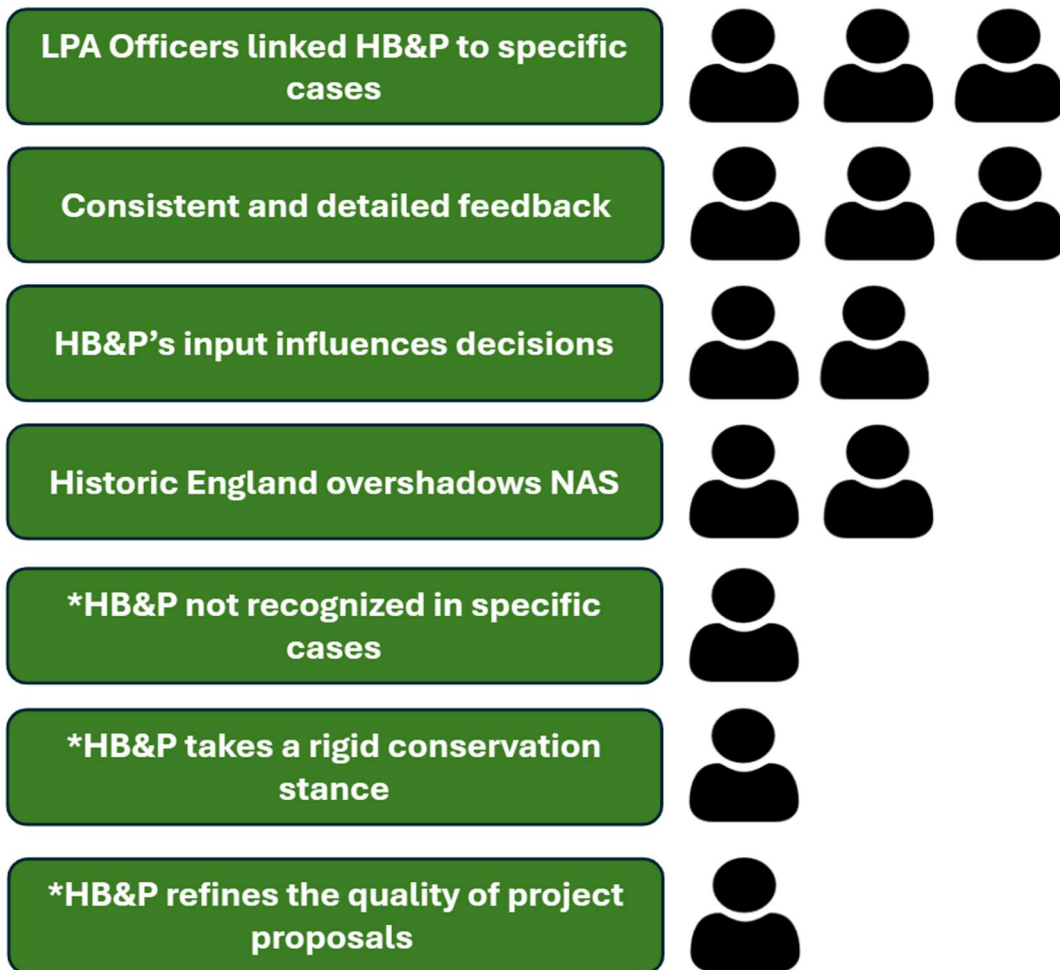


Figure 22. Themes in LPA Officers' Responses about HB&P's Impact on Planning Decisions. (Shaded icons represent the number of LPA officers who mentioned each statement; stars represent further elaboration was made)

4.4.4. Areas for HB&P's and NAS Improvement

While officers described ways in which HB&P plays a crucial role in conservation efforts, they also identified areas where its effectiveness could be enhanced (Figure 23). **One issue raised independently by three LPA Officers is a lack of clarity regarding HB&P's expertise and specialisation.** One LPA Officer stated that, “sometimes it’s not clear what the focus of the different amenity societies are. So, for example, I’m aware that groups like the Victorian Society and Georgian group have particular periods that they are interested in, but where you’ve got other groups like Historic Buildings and Places.” These viewpoints suggest that HB&P establish a more defined niche that clearly demonstrates their specialisation and expertise within the broader network of amenity societies. Establishing a distinct focus can improve their recognition among LPA Officers and ensure that their contributions are seen as uniquely valuable rather than overlapping with other organisations.

Another key issue is the inefficient allocation of resources, as three officers noted redundant responses or duplication of effort across NAS. One LPA Officer remarked that this misallocation amounted to “wasted firepower,” as NAS’ efforts were sometimes directed at minor applications instead of those with greater conservation significance. Another officer observed, “sometimes you get a sense that some things might be missed, so you might get comments from an amenity society on what we think of as being relatively small and insignificant application.” It suggests that NAS sometimes focuses on applications that do not significantly impact conservation goals, while more pressing cases that require immediate attention may not receive feedback. The misallocation of effort can create inefficiencies in the planning process and delay necessary interventions for historically significant sites.

Public awareness of HB&P remains low, limiting their ability to engage effectively with community stakeholders. Two LPA Officers from the North and East of England felt that HB&P’s role and contributions are not widely recognised, in part due to limited branding and promotional efforts, which weakens opportunities for meaningful collaboration. One Planning Officer encouraged HB&P to “really promote who you are and what you're doing and what your role is.” This highlights the importance of proactive self-promotion—not only to clarify HB&P’s purpose in the planning process but also to position itself as an essential resource for heritage conservation. Increasing their visibility amongst the public through targeted communication strategies and clearer branding would not only help the organisation build stronger relationships with LPA Officers but create greater

recognition within the public. Officers also acknowledged that other National Amenity Societies face similar challenges in raising public awareness and strengthening their visibility.

Three officers noted that HB&P's strong focus on conservation can sometimes create challenges in its interactions with LPAs. While HB&P's expertise in heritage preservation is valuable, LPAs must also consider other factors such as development and economic growth. One officer explained, "Amenity societies are looking purely at the heritage aspects, whereas we [LPAs] have to take a much more balanced approach in decision-making." As a result, there can be differences in perspective, particularly in cases where LPAs need to weigh multiple priorities. In some instances, HB&P's conservation-focused recommendations may be difficult to integrate with broader planning considerations, leading to further discussions to find a balanced outcome. Although this concern was raised specifically about HB&P, officers noted that differences in approach between LPAs and other National Amenity Societies exist.

One officer from the North of England raised concerns about the lack of transparency in no-comment responses. HB&P responses stating 'assessed but no comment' are not always communicated effectively to LPA Officers, which sometimes leads to confusion. Without explicit confirmation of their review process, officers may assume that a case has been overlooked or not considered important enough to receive feedback. While this issue was specifically mentioned in relation to HB&P, officers noted that similar communication challenges exist across multiple National Amenity Societies.

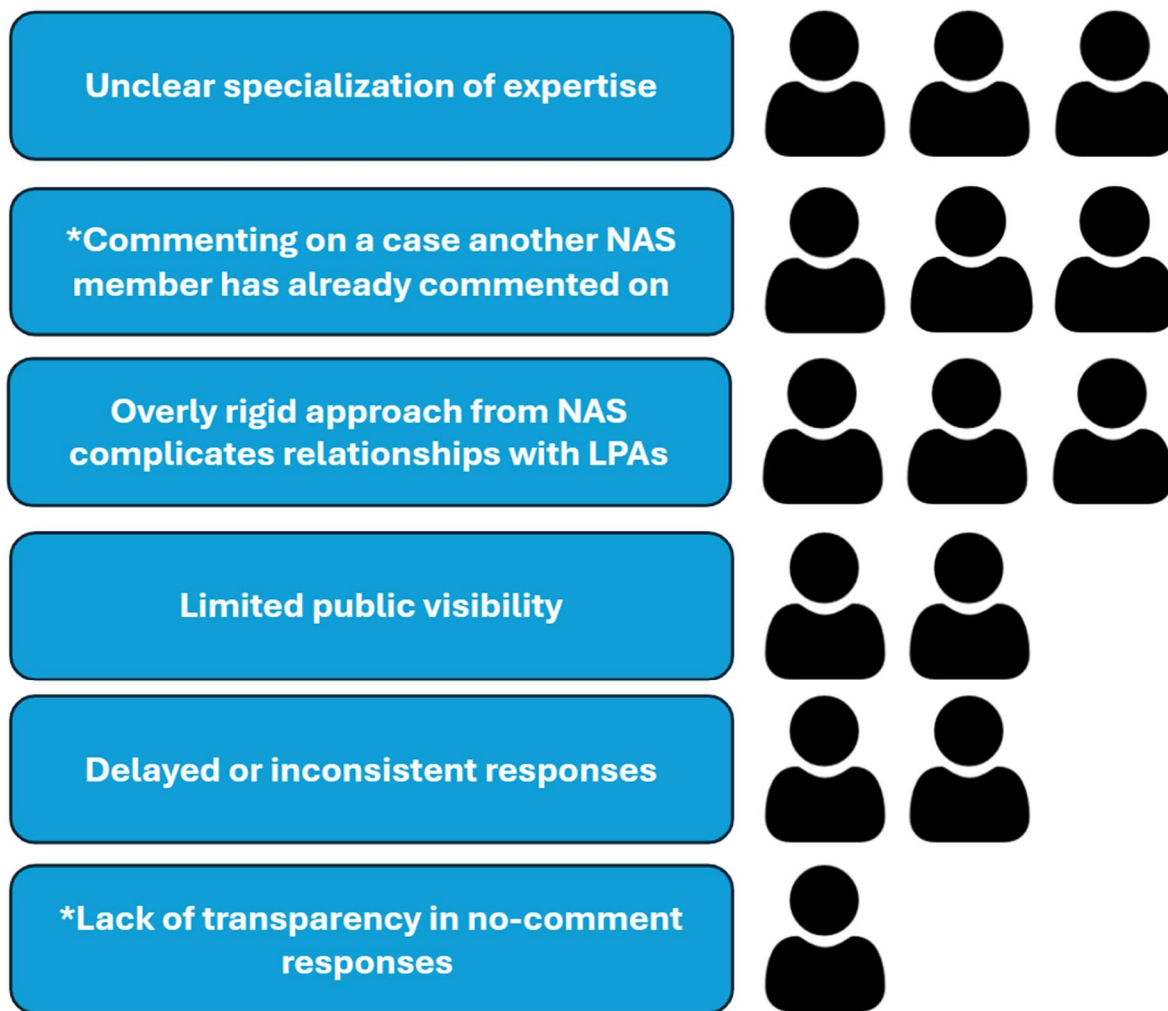


Figure 23. Themes in LPA Officers' Responses about Areas for HB&P's Improvement. (Shaded icons represent the number of LPA officers who mentioned each statement; stars represent further elaboration was made)

4.5 Limitations

This section outlines key limitations in the analysis of HB&P's Change of Use casework. Additionally, we discuss the potential implications for data reliability and comprehensiveness.

Patterns in HB&P's Change of Use casework may not be generalisable to all Change of Use cases across England and Wales: Patterns in HB&P's CoU casework may not be generalised to all CoU cases across England and Wales. We only analysed CoU cases for which HB&P provided consultation. These cases are a small subset of all of the CoU applications submitted to the JCNAS. Furthermore, HB&P's selected casework may over- or under-represent some geographic regions. Therefore, patterns cannot be generalised.

Limitations in Data Scope: While this study categorises Change of Use applications consulted by HB&P from 2020-2025, the analysis focuses on data from 2022-2025, limiting the ability to assess trends over time. This constraint means patterns in certain categories such as the dominance of residential conversions may be driven by temporary socio-economic factors rather than indicating a lasting shift in how heritage assets are repurposed. Without earlier data points for comparison, it remains unclear whether these findings represent cyclical fluctuations or a more permanent transformation in Change of Use applications. If HB&P staff can continue those types of analysis in the future, they will be able to identify true trends over time.

5. Recommendations

In this chapter, we outline recommendations for Historic Buildings and Places (HB&P) to advance their impact assessment efforts. The first section focuses on enhancing HB&P's current data collection system to improve their ability to analyse CoU casework. The second section highlights a few of the most prominent recommendations that emerged from discussions with LPA Officers. The third section introduces a proposed questionnaire designed to capture the same insights we obtained from interviews with case officers, but in a more streamlined and hands-off manner, ensuring continued data collection without placing additional strain on HB&P staff. We conclude with recommendations for future research.

5.1 Continuing the Documentation and Analysis of Change of Use Casework.

To sustain the type of impact assessment that we demonstrated when analysing HB&P's CoU casework from 2022-2025, we recommend that HB&P utilise the procedures for data collection and analysis presented in this section.

Continuing to Use the CoU-Specific Database: Since HB&P staff already use Microsoft Excel to compile casework from the publicly accessible CBA Planning Database, continuing to develop a Change of Use-specific database would be a natural extension of their current system. This would allow HB&P to quickly sort and organise relevant CoU applications into structured Excel sheets using built-in filtering tools for future data analysis. The specifics of transferring CoU cases from the work register to a specific CoU workbook can be found in Appendix D.

Collecting and analysing additional Change of Use data fields: We have set up the CoU casework spreadsheet with additional data fields that would help better reflect the organisation's commitment to breadth and diversity in heritage conservation. To continue this effort, we recommend that HB&P staff use the dropdown menus we developed to systematically classify cases by pre- and post-use. This means that after reviewing the case, the case officer would need to take some additional time to select the pre- and post-use building types from the dropdown menu. This small investment of time would enhance capability for impact assessment and identification of trends in casework. Additionally, logging characteristics such as grade designations, regions, and responses in

consultations ensures HB&P's constructive approach to heritage conservation is well-documented, demonstrating how their guidance supports heritage-sensitive adaptation rather than opposition to change.

Using Excel automated data analytics: Leveraging Excel's automated workflow features, such as pivot tables, can significantly enhance HB&P's ability to track and interpret CoU casework data. Pivot tables dynamically sort, filter, and summarise large datasets, allowing for real-time adjustments without manual re-entry. This automation streamlines the interpretation portion of their casework, enabling HB&P to quickly identify clusters and relevant trends. Additionally, the ability to generate interactive charts ensures that data insights are visually accessible and easily updated as new cases are logged. To support this process, we recommend HB&P staff use the provided manuals (Appendix C) to implement pivot tables and visualisation tools, optimising their casework analysis.

Utilising Power-User for heatmapping: Building on insights from previous student researchers who collaborated with HB&P, our team has identified Power-User as an effective tool for streamlining the data tracking and assessment process for CoU casework. By integrating Power-User's automated mapping functions, HB&P can visualise geographic distributions of their casework in real-time, reducing the need for manual data sorting. These heat maps enable HB&P to assess regional patterns more efficiently, allowing for deeper analysis of how Change of Use applications vary across different planning authorities. This approach enhances HB&P's ability to monitor spatial trends over time and refine their consultation approaches accordingly.

Utilising the County Converter for England Change of Use casework: To complement Power-Users' comprehensive heatmapping features for England, which are organised by county, we recommend an Excel tool we developed that map planning councils to their corresponding counties. Using cut-and-paste and text-matching functions, this tool automatically links case entries to mapped counties, allowing HB&P to identify areas with limited consultation coverage. By analysing these distributions, HB&P can pinpoint under-resourced LPAs that may lack heritage expertise and would benefit from their advisory support. This enables more strategic resource allocation, ensuring their guidance reaches areas where it can have the greatest impact in promoting heritage-sensitive planning decisions. The instructions to continue this effort are also included in the manuals provided to HB&P staff.

Creating an infographic of Change of Use consultations: Effectively presenting data analysis alongside charts and tables can be challenging. To enhance accessibility, we recommend that HB&P utilise an infographic to showcase key findings from their Change of Use casework. Additionally, publishing the infographic on HB&P's website would allow for wider dissemination, reaching larger audiences and making their impact more digestible to the other interested stakeholders. Given the increasing prevalence of Change of Use casework in society, the public is likely to have a growing interest in understanding how heritage resources are being allocated, and the level of support being allocated to these applications. An example of a possible infographic layout can be found in Appendix E.

5.2 Improving Recognition of HB&P and Allocation of National Amenity Society Efforts

Based on our findings from the interviews conducted with LPA Officers, we have some recommendations for HB&P about ways to convey their impacts to stakeholders and to improve their overall consultation procedure:

Getting more involved in the Pre-Application Process or communicating another type of specialisation: Several LPA Officers remarked that HB&P does not have a specified niche like other members of the JCNAS, resulting in a disconnect between the work that they do and community perceptions. One suggested improvement, based on the feedback from one of the officers interviewed, is for HB&P to become more involved in the pre-application process. This stage allows applicants to receive early feedback before formally submitting proposals, ensuring that heritage considerations are addressed from the outset. Increased engagement in this stage may help establish HB&P as a key consulting body making their contributions more recognisable and reinforcing their role in the early planning discussions.

Working with the JCNAS to coordinate responses to casework: Many JCNAS organisations operate with limited resources, making strategic allocation of casework crucial. LPA Officers noted that while high-profile cases often receive comments from multiple JCNAS organisations—an effective use of resources given their complexity and impact—lower-profile cases sometimes go unaddressed or receive redundant input. One Planning Officer suggested that JCNAS organisations coordinate their responses to ensure a more balanced distribution of comments across cases in the

planning database. This would help focus efforts where they are most needed while avoiding unnecessary overlap on cases with less significant heritage implications.

5.3 Continuing to Collect Community-Level Impact Data

Based on the findings in the interview process with LPA Officers, we recommend that HB&P continue to collect data from LPA Officers to gain further insight into the qualitative data of their casework: It is essential that HB&P can understand their contributions and impacts within local communities. However, with staffing constraints it remains difficult to collect this type of data in a reasonable manner. This is why our team recommends the annual distribution of a questionnaire designed to collect data from LPA Officers in a hands-off manner.

Using a questionnaire to collect quantitative data from LPA Officers: A draft of the questionnaire can be found in Appendix G. The layout of the questionnaire is a total of nine questions with the last two being open ended. The questions were formatted in a way to capture the common themes that we found between LPA Officer responses during our interviews with them. The criteria for the questions include:

1. Asses the effectiveness of HB&P during the consultation procedure
2. Asses the awareness that officers have of the role that HB&P plays in heritage conservation
3. If HB&P had an influence on the final planning decision
4. Areas for HB&P to improve

Transforming insights from LPA Officers into a questionnaire provides a structured tool for HB&P to adjust their consultation process as necessary based on the feedback they receive from officers. This feedback will not only provide HB&P with areas for improvement, but also a way to showcase the impacts that they have in the decision-making process of cases they consult on.

Automating data collection and analysis by using Microsoft platforms: Given HB&P's limited staffing resources, streamlining data collection is essential to ensure efficient analysis and reporting. We recommend establishing a dedicated Excel sheet to systematically log questionnaire responses from LPA Officers. By utilising Microsoft Forms for distribution, responses can be automatically recorded and categorised within the Excel sheet, minimising manual data entry and improving accuracy.

Moreover, implementing pivot tables would allow HB&P to automatically analyse and interpret response data into visual aids, such as charts and summary tables. This automation would support HB&P in efficiently compiling feedback from LPAs into visual summaries that could be incorporated into future impact reports.

5.4 Recommendations for Future Research

The recommendations we've outlined aim to help HB&P produce well-rounded impact reports within the next three to four years, communicating their role in heritage conservation efforts made across the United Kingdom. Through improving how data is collected and analysed, HB&P may increase transparency with local communities, allocate their resources more effectively, and create stronger appeals for continued funding.

A key takeaway is how workflow automation within modern technology can help under-resourced organisations like HB&P collect and analyse data more efficiently. Automated tools could reduce manual work, improve accuracy, and make it easier to conduct an analysis of both numerical and qualitative data moving forward.

In prioritising quantitative data, HB&P may gain access to valuable insights in a much easier manner compared to gathering qualitative data, allowing for a more complete understanding of their impact, from measurable consultation involvement to community perspectives. This approach could strengthen their reputation as a trusted advisory organisation while also serving as a model for other JCNAS groups seeking effective data strategies. By implementing these recommendations, HB&P could position itself as a leader in evidence-based heritage advocacy, ensuring their contributions are well-documented and widely recognised.

Of course, there are many opportunities for further research that would assist HB&P in advancing its impact assessment efforts. Below, we outline key areas where we believe a future research team could provide valuable insights and support:

Engaging with heritage civic societies: Civic societies directly represent the community groups most affected by planning decisions. Their insights could help HB&P assess how its casework influences community identity, accessibility, and the long-term sustainability of heritage assets. By capturing the perspectives of these societies, HB&P could provide a more comprehensive assessment of its impact, demonstrating not just how often its recommendations are considered but also how they shape real-world heritage conservation outcomes. This approach could enhance the credibility of

HB&P's impact reports, providing stakeholders with a more complete picture of its role in preserving heritage within local communities.

Tracking key details such as the number of proposed dwellings and residence type: Tracking the number of proposed dwellings and their residence types would provide HB&P with a clearer understanding of the scale and nature of the economic pressures that are impacting conservation efforts. Categorising building types—such as apartments, single-family homes, or houses in multiple occupation (HMOs)—would offer valuable insights into these trends. Additionally, this data would help assess how heritage assets contribute to the housing supply and their alignment with broader Heritage for Housing initiatives in the UK, ensuring that development strategies integrate historical preservation with modern housing needs.

Documenting the reasons for objection with regard to CoU applications: Documenting the reasons for objections to Change of Use (CoU) applications would help HB&P identify common barriers that applicants face when proposing adaptive reuse of heritage sites. Analysing these objections would provide insights into gaps in information or regulatory challenges, allowing HB&P to refine its outreach and educational materials to better support initiatives for sustainable adaptive reuse strategies. This information is accessible through local planning authority websites, where final decision letters outline the specific reasons for rejecting proposals. By systematically tracking these objections, HB&P can strengthen its efforts in promoting informed and effective reuse of heritage sites.

Defining Key Performance Indicators to define and evaluate success: The development of clear Key Performance Indicators (KPIs) would provide a more structured framework for assessing HB&P's impact on heritage-led initiatives. Rather than introducing an entirely new evaluation system, these KPIs would be designed to reference the three key impacts previously identified—assistance within local planning decisions, a reduction in demolition requests, and improvements in the quality of applications. By establishing specific metrics under these categories, such as the percentage of LPAs that found HB&P's input valuable in their final decision-making or the percentage that appreciated the level of support provided, the organisation could adopt a more data-driven approach to impact assessment. Furthermore, with the protocol developed by our team, future KPIs could be shaped around the data it's designed to collect, ensuring that ongoing evaluation remains aligned with stakeholder feedback. This structured assessment would enhance transparency and accountability while supporting the development of a comprehensive impact report. Such a

report would serve as a valuable resource for policymakers, funding bodies, and the public, reinforcing the significance of HB&P's contributions to heritage conservation.

5.5 Conclusion

It is our hope that the findings and recommendations of this study along with the proposed plans for future work provides Historic Buildings and Places with a clear pathway toward developing an effective system for impact reports. By implementing such a system, the organisation can refine their data collection methods and establish more effective evaluation metrics. Additionally, the suggestions for future work can help to further streamline reporting methodologies, ensuring that future impact reports are not only data-driven but also compelling. It is our hope through these steps, Historic Buildings and Places will be better positioned to communicate their value, secure funding, and continue to effectively encourage conservation efforts.

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Appendix A: Semi-structured Interview Questions for LPA Officers

Role of NAS in Assisting in Planning Decisions

1) How would you describe the role of National Amenity Societies in assisting your council towards conserving historic sites in [insert District]?

2) How would you describe the level of assistance that NAS provides within the consultation stages of planning permissions and listed building consent decisions?

- *Follow-up:* Would you say their input and assistance bears significance in regard to shaping policy decisions?

3) Can you recall any instances/ significant cases in which the advice from NAS directly assisted in the outcome of any planning decisions?

- *Follow-up:* Present some of the notable cases in which HB&P had consulted on within the area.

4) In your view, would you say the input from NAS significantly affects how heritage conservation is approached in [insert District] as opposed to being just another voice within the decision-making process?

- *Follow-up:* Are there specific factors that make their recommendations more or less valuable when shaping local decisions? (level of detail, strength of argument, corroboration amongst the societies)

5) For case XXX, do you recall receiving conservation advice? If so, did it have any considerable weight towards the final planning outcome?

- *Follow-up:* Do you recall whether HB&P was involved and how their advice separated itself to that of other statutory consultees?

Community Valuation of Heritage

6) How much do you feel the local community values heritage as a whole within [insert District]?

- *Follow-up: How is this reflected on a routine basis?*

7) How would you describe the level of public engagement with heritage conservation efforts in [insert District]?

8) From your experience, have you observed any changes in community participation in planning discussion related to heritage sites?

- *Follow-up: Would you say there's been an increase or decrease in public involvement over time? If so, what do you think has contributed to that shift?*

Impacts of HB&P

9) Can you recall any specific cases where HB&P's input played a particularly valuable role in the planning decision process?

10) (Call back to Question 5) Throughout the decision process for [discuss case that HB&P contributed to], what has been the most significant contribution of external input from these Amenity Societies?

- *Follow-up: Could you identify any one in particular?*

Areas for Improvement

11) How does HB&P's approach to heritage consultation compare to other JCNAS you've interacted with?

- *Follow-up: Are there particular strengths or gaps in their approach that stand out to you?*

12) When receiving professional input from multiple JCNAS organisations, how do you differentiate between their perspectives/voices?

- *Follow-up: Have you felt that Historic Buildings and Places offers a unique viewpoint rather than aligning within the broader consensus from other NAS?*

13) If Historic Buildings and Places wanted to strengthen their impact in the consultation process, what areas do you think it should focus on?

Appendix B: Interview Consent Form for LPA Officers

Interview Consent Form

We are student researchers from Worcester Polytechnic Institute (WPI), hosted by Historic Buildings and Places (HB&P). Site X emerges as a prominent area for HB&P's consultation work, and we're particularly interested in assessing the assistance and efforts of HB&P's guidance on the outcomes of various cases.

Participation is entirely voluntary with interviews scheduled to last around 30 minutes. You can abstain from answering any of the questions and withdraw from the interview at any time.

With your consent, we would like to audio record in addition to taking notes during the interview. WPI and HB&P will produce research reports and other outputs using the data collected from interviews. You will have the choice of remaining anonymous or being identified by name. If we would like to quote from your interview, we will ask for your permission prior to publication. Any personal data you choose to share with us will be stored securely and disposed of by 8 May 2025 in line with the UK General Data Protection Regulation 2018.

If any further questions arise about this interview, please contact WPI's team at gr-lonc25.hbap@wpi.edu, our WPI faculty advisors at vaz@wpi.edu and cdemetry@wpi.edu, or HB&P at office@hbap.org.uk.

If you have any questions about how Historic Buildings & Places uses data, please see Historic Buildings & Places' Privacy Policy hbap.org.uk/privacy-policy or email office@hbap.org.uk.

Appendix C: Manual for Pivot Tables

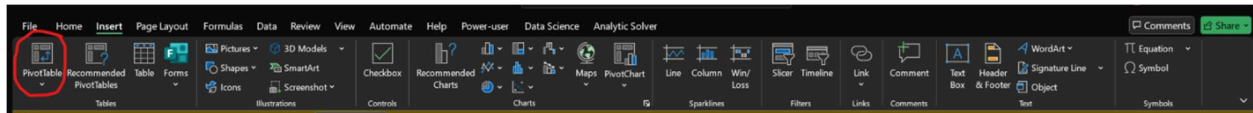
Pivot Table Manual

This manual will teach you everything you need to know about Pivot Tables in Excel

Part 1: How to make a Pivot Table?

The first part of making a pivot table is selecting the data that will be on it. Most of the time, we just select the entire spreadsheet, which you do by clicking the small arrow in the top left corner.

After that, go to the insert tab at the top of the screen and click pivot table, which should be the option furthest left.



After clicking, you should be prompted with creating the table in a new workbook or an existing workbook. A new workbook should be created with a pivot table if you select it. If you want it in an existing workbook, click an empty panel you would like the table to be in. You should observe the space in the menu fill with whatever panel you clicked.

After that click “ok” and the empty table should be ready to go.

Common Issues

An error message says a pivot table cannot be created because the field name is not valid

-> this message occurs when one of the data fields is not valid and is likely caused by selecting the entire spreadsheet. If this occurs, select all the columns of the data table rather than the entire spreadsheet when creating the pivot table.

An error message saying that the table cannot be created because there is no room

-> two pivot tables cannot overlap, so this message is saying that the cell you selected is too close to another table. In this case, simply select another cell farther from any nearby pivot tables and it should fix the issue

Appendix D: Manual for Change of Use Data

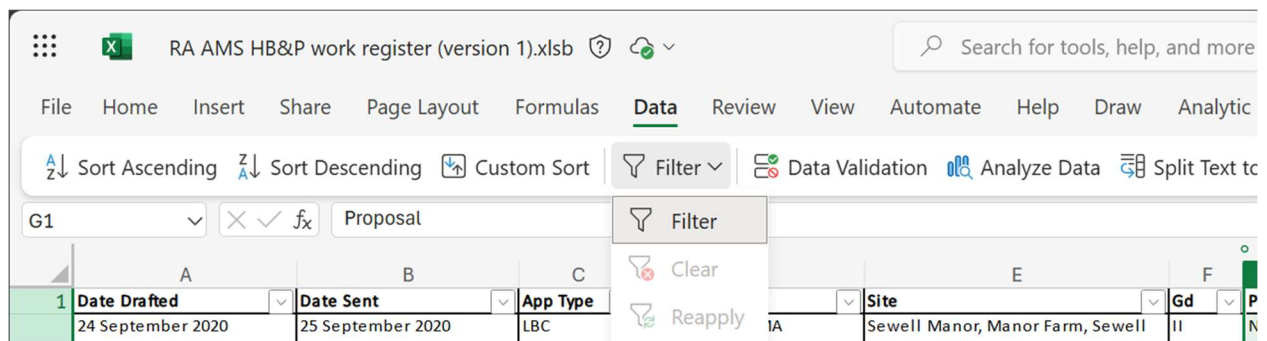
How to Isolate COU Casework from the Work Register Spreadsheet

Step 1:

Enter the work register spreadsheet

Step 2:

Under the data tab at the top of the screen, click filter.



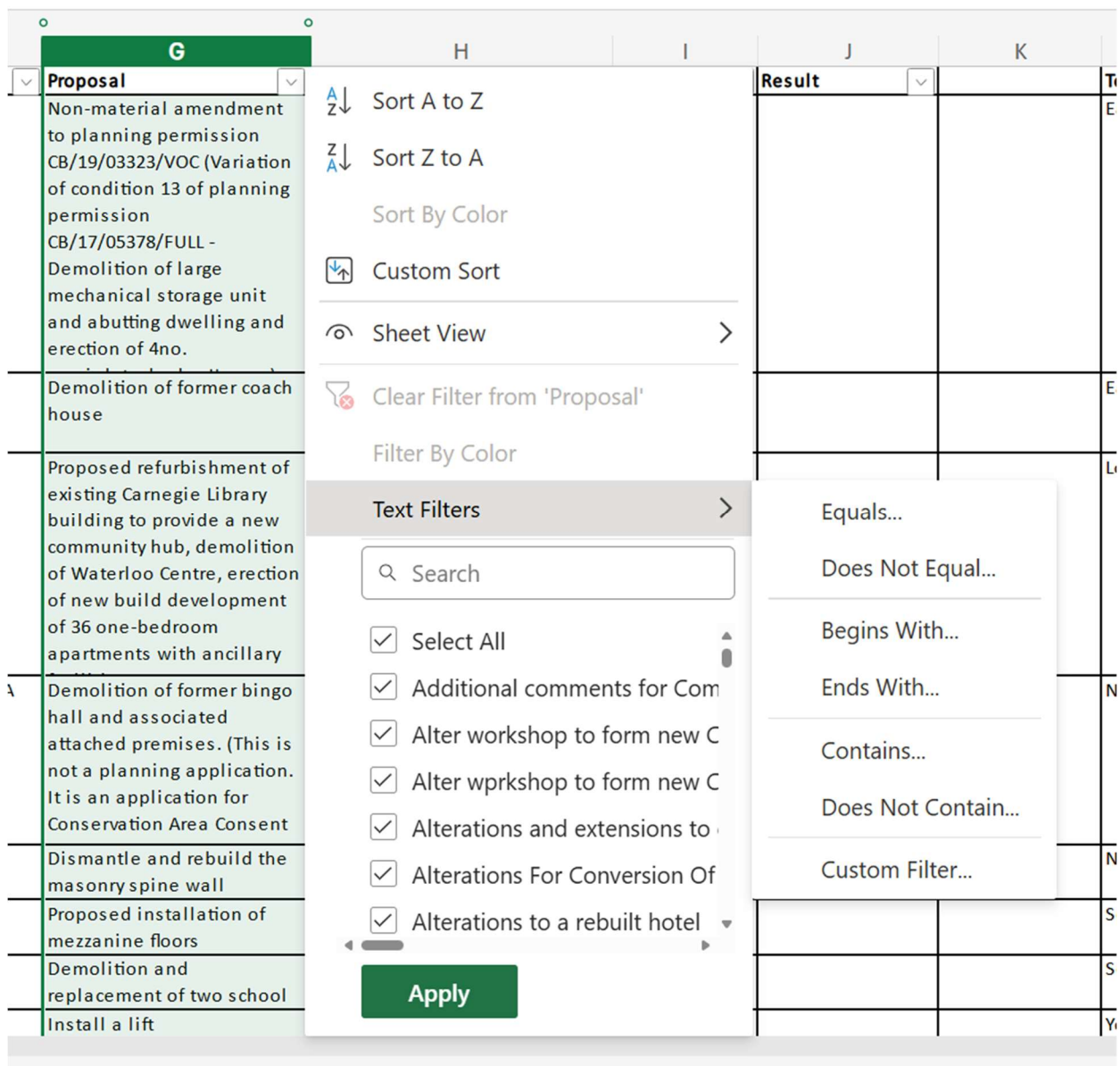
You should observe little drop-down boxes appear at the side of the top of each column

E	F	G	H
Site	Gd	Proposal	Council
Sewell Manor, Manor Farm, Sewell Lane, Sewell, Dunstable, LU6 1RP	II	Non-material amendment to planning permission CB/19/03323/VOC (Variation of condition 13 of planning permission CB/17/05378/FULL - Demolition of large mechanical storage unit and abutting dwelling and erection of 4no.	Central Bedfordshire
Former Coach House, land adjacent to 22 London Road, Chatteris, Cambridgeshire	II	Demolition of former coach house	Fenland
Waterloo House, Carnegie Library, Egerton Street, Runcorn, Cheshire, WA7 1JL	II	Proposed refurbishment of existing Carnegie Library building to provide a new community hub, demolition	Halton

If you don't see them, click on an empty cell in the sheet and click filter again

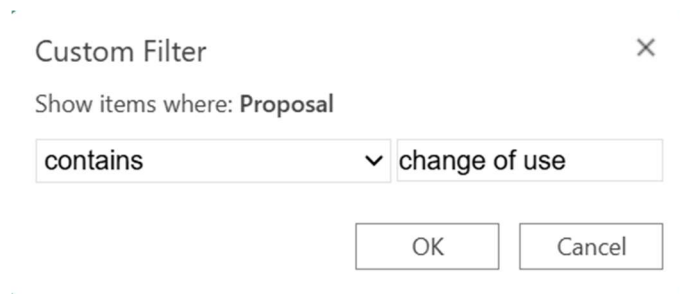
Step 3:

Under column G, click the box on the side of the column, then go to text filters. You should see a small menu pop up. Click the contains option.



Step 4:

In the menu that pops up, type change of use. What we're doing here is sorting the data entries by only showing the ones that contain a certain piece of text. This can be used to sort other types of casework as well.



Custom Filter

Show items where: Proposal

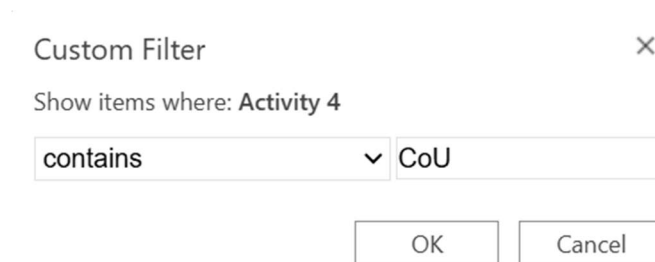
contains ▼ change of use

OK Cancel

If a message pops up saying that others are making changes, click either option. “Just for me” makes it so that only you can see what you’ve sorted, while “everyone” hides all the entries in the spreadsheet that don’t contain what you’re looking for, meaning it sorts for everyone looking at the spreadsheet.

Step 4(alt):

On more recent casework sheets, there is a column that already labels a case as being change of use. On these sheets, all you have to do is follow the steps seen above, but instead of the column with the casework descriptions, you click on the column that has the label. Then just sort by CoU and you’ll get all cases labeled as CoU.



Custom Filter

Show items where: Activity 4

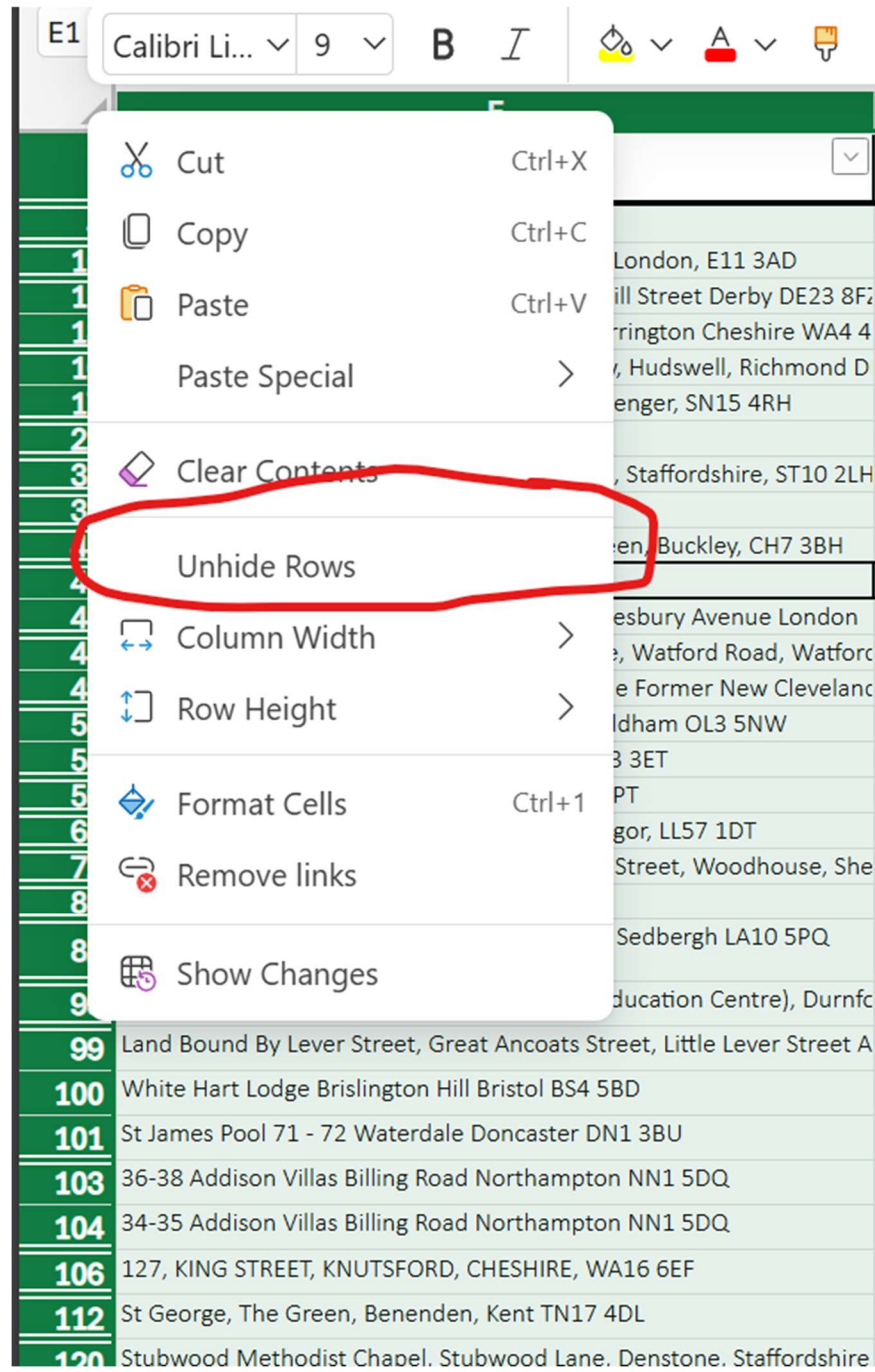
contains ▼ CoU

OK Cancel

Congrats, the sheet has now been sorted to only display the options that are change of use cases.

Step 5:

Should you ever want to unsort for any reason, just right-click on the top left of the spreadsheet and select the Unhide Rows option.

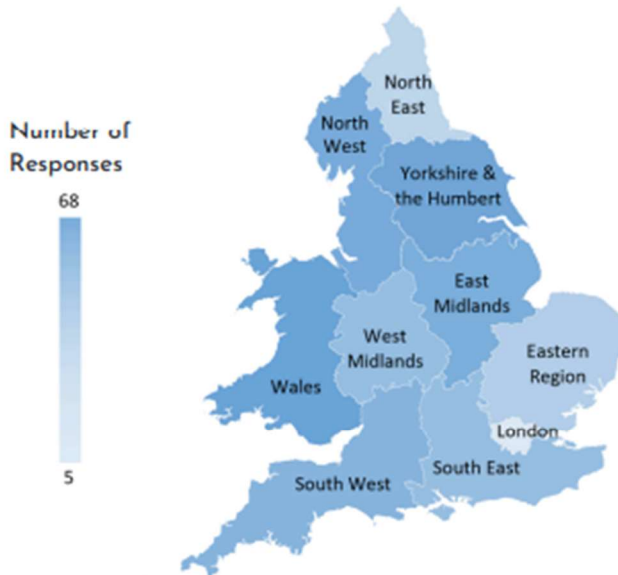


Appendix E: Infographic of Change of Use Findings



Trends Within England and Wales

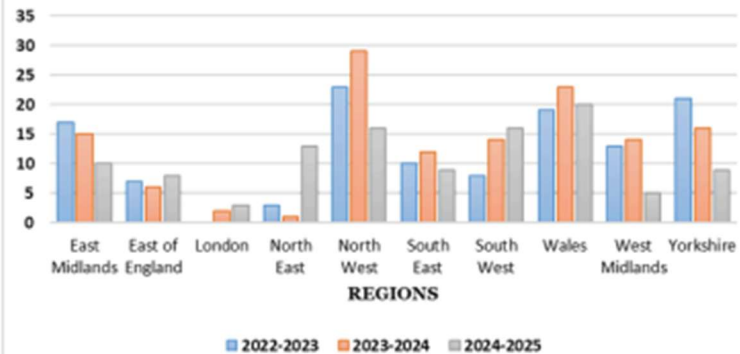
HB&P's COU Casework ('22-'25)



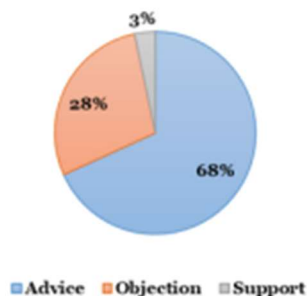
Across the past 3 years, HB&P consulted on 362 COU cases. Among those the North West and Wales received the most attention with 68 and 62 consultations respectively.

2023-2024 fiscal year had 132 of the total 362 change of use cases consulted on. Amounting to 36%.

Historic Buildings and Places Change of Use Regional Consultations (2022-2025)



Responses by HB&P to Change of Use Casework (2022-2025)



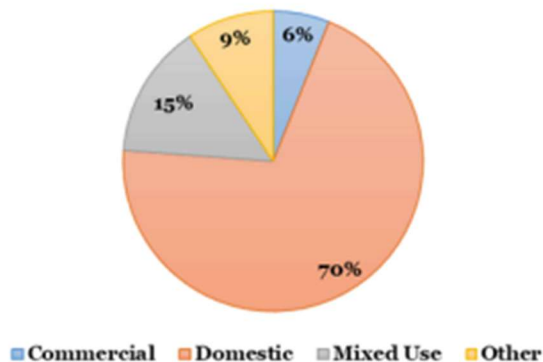
68% received letters of advice

28% received letters of objection

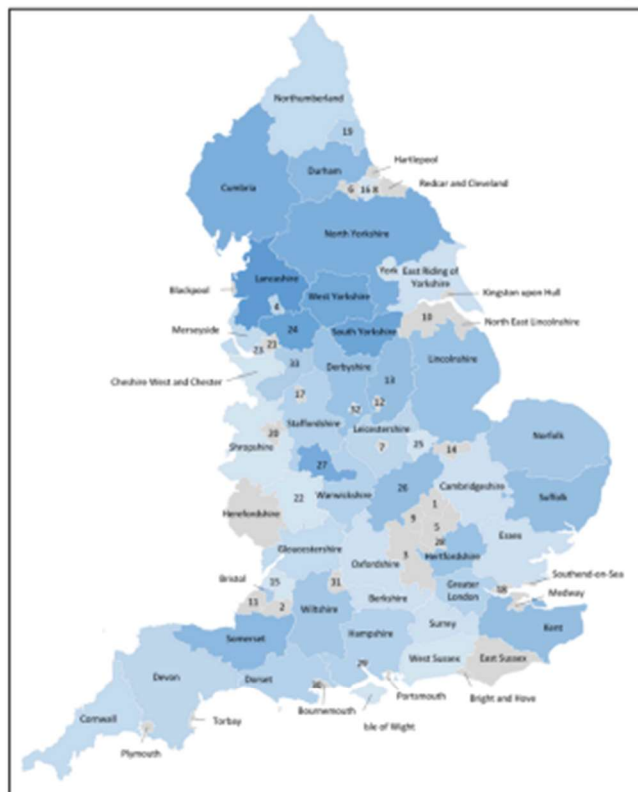
3% received letters of support

COU Trends Within England

**Proposed Use of HB&P's English
Change of Use Casework (2022-2025)**



Over the past 3 years of casework, in cases where the functional class of the building changed, 70% of the buildings were proposed to become domestic

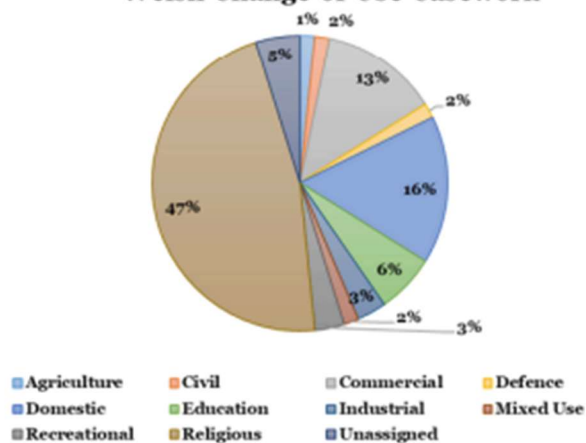


#	Area	Value
1	Bedford	0
2	Bath and North East Somerset	0
3	Buckinghamshire	0
4	Blackburn with Darwen	4
5	Central Bedfordshire	0
6	Darlington	0
7	Leicester	0
8	Middlesbrough	0
9	Milton Keynes	0
10	North Lincolnshire	0
11	North Somerset	0
12	Nottingham	0
13	Nottinghamshire	9
14	Peterborough	0
15	South Gloucestershire	1
16	Stockton-on-Tees	1
17	Stockton-on-Trent	0
18	Thurrock	0
19	Tyne and Wear	5
20	Telford and Wrekin	0
21	Warrington	0
22	Worcestershire	1
23	Halton	3
24	Greater Manchester	19
25	Rutland	1
26	Northamptonshire	9
27	West Midlands	21
28	Luton	0
29	Southampton	2
30	Pool	0
31	Swindon	0
32	Derby	2
33	Cheshire East	6

The counties that saw the most casework were Greater Manchester, West Midlands, and West Yorkshire

COU Trends Within Wales

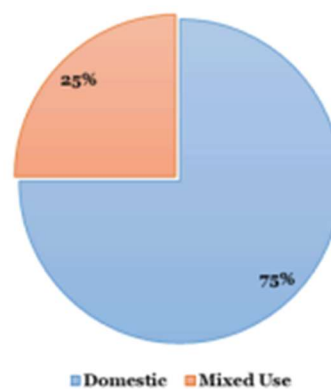
Breakdown of Initial Building Types for Welsh Change of Use Casework



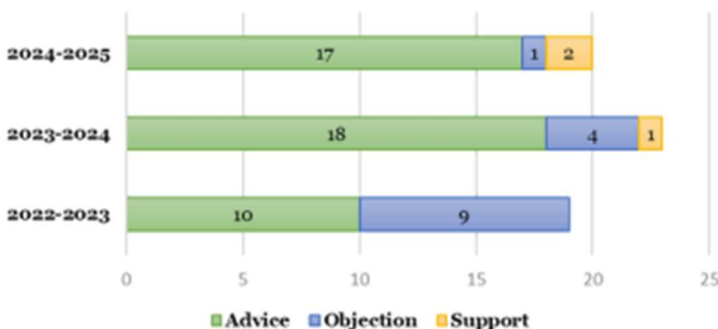
Of the 62 COU cases in Wales, 47% of buildings began with a religious classification

In cases where the functional class of the building changed, 75% of religious buildings were proposed to become domestic

Breakdown of Proposed Changes To Religious Buildings in Wales



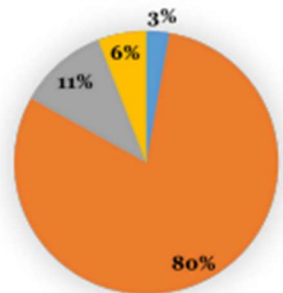
HB&P's Responses to CoU Cases in Wales



Every year, a majority of HB&P's responses were letters of advice

Miscellaneous COU Trends

Grade Breakdown of HB&P Casework

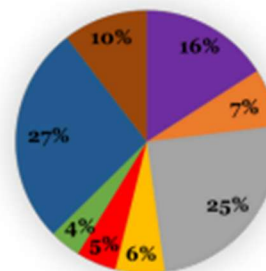


■ I ■ II ■ II* ■ Undesignated

80% of HB&P's Change of Use casework was involved grade II sites

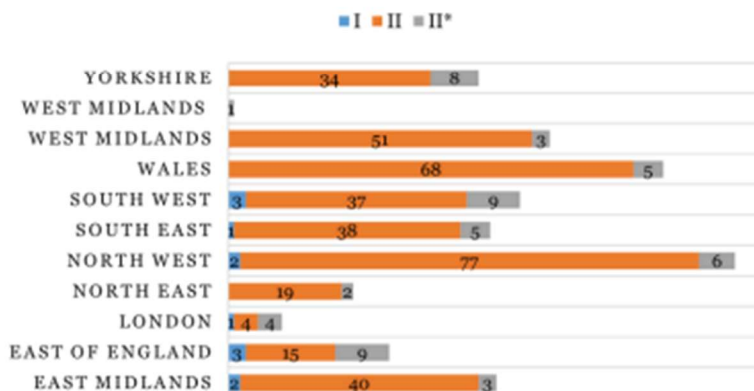
In cases where the building was proposed to be domestic, 27% of the time the building's current use was religious

Current Use of Buildings proposed to become domestic



■ Agriculture ■ Civil ■ Commercial ■ Education ■ Industrial ■ Recreational ■ Religious ■ Other

GRADE BREAKDOWN BY REGION

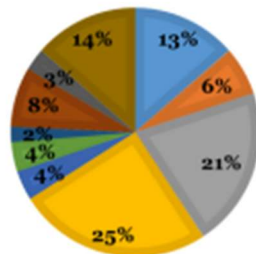


In most regions, a majority of the cases involved grade II sites.

Miscellaneous COU Trends

BREAKDOWN OF BUILDINGS BEING PROPOSED TO BECOME DOMESTIC IN ENGLAND

■ Agriculture ■ Civil ■ Commercial ■ Domestic ■ Education
■ Industrial ■ Mixed Use ■ Other ■ Recreational ■ Religious

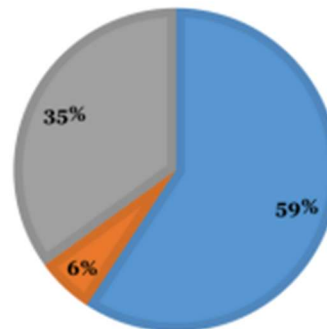


25% of domestic cases do not involve a change in the building's functional class

59% of residential cases propose the creation of flats.

RESIDENTIAL TYPE BREAKDOWN

■ Apartments ■ HMO ■ Single Home




1400 New Dwellings have been proposed in the last 3 years.

Appendix F: Examples of Automated Data Tables for Change of Use Analysis

Data for CoU Proposed Conversions Commented on by HB&P (22-25)					
Year	(Multiple Items)				
Count of Conversion	Column Labels				
Row Labels	Advice	No Objection	Objection	Support	Grand Total
Agriculture into Commercial		1			1
Agriculture into Domestic	21	1	7		29
Agriculture into Mixed Use	1		1		2
Agriculture into Recreational	1				1
Civil into Commemorative			1		1
Civil into Commercial	3				3
Civil into Domestic	4		9		13
Civil into Health	1				1
Civil into Mixed Use	5				5
Civil into Recreational	1				1
Civil into Religious	1				1
Commemorative into Education	1				1
Commercial into Domestic	30		15		45
Commercial into Education	3		1		4
Commercial into Health	1				1
Commercial into Mixed Use	9		4		13
Commercial into Unassigned			1		1
Defence into Domestic	1		1		2
Defence into Mixed Use				1	1
Domestic into Commercial	4		1		5
Domestic into Education			1		1
Domestic into Health	2				2
Domestic into Industrial	1				1
Domestic into Mixed Use	1				1
Education into Commercial	1		1		2
Education into Domestic	5		6		11
Education into Mixed Use	3				3
Garden into Transport	1				1
Health into Domestic	2		3		5
Industrial into Commercial			1		1
Industrial into Domestic	6		3		9
Industrial into Health	1				1
Industrial into Mixed Use	2		2		4
Mixed Use into Domestic	3		2		5
Mixed Use into Health	1				1
Monument into Domestic	1				1
Monument into Mixed Use	1				1
Recreational into Domestic	4		3		7
Recreational into Mixed Use	1				1
Religious into Commercial	2				2
Religious into Domestic	38		7	4	49
Religious into Mixed Use	6	1	1		8
Religious into Recreational			1		1
Transport into Mixed Use	1				1
Unassigned into Commercial	2				2
Unassigned into Domestic	3		3		6
Unassigned into Education	2				2
Unassigned into Health	1				1
Unassigned into Mixed Use	3				3
NO CHANGE IN FUNCTIONAL CLASS	66	2	28	2	98
Grand Total	247	5	103	7	362


Data For HB&P's Regional Consultation (22-25)				
Count of Reponse	Post-use			
Pre-Use	2022-2023	2023-2024	2024-2025	Grand Total
East Midlands	17	15	10	42
East of England	7	6	8	21
London		2	3	5
North East	3	1	13	17
North West	23	29	16	68
South East	10	12	9	31
South West	8	14	16	38
Wales	19	23	20	62
West Midlands	13	14	5	32
Yorkshire	21	16	9	46
Grand Total	121	132	109	362


HB&Ps Response Distributions to Changes in FC to Domestic vs Retaining Domestic

Year (Multiple Items) 

Current Use (Multiple Items) 

Count of Proposed Use	Post-use	
Pre-Use	Domestic	Grand Total
Advice	64.84%	64.84%
No Objection	0.55%	0.55%
Objection	32.42%	32.42%
Support	2.20%	2.20%
Grand Total	100.00%	100.00%

Year (Multiple Items) 

Current Use Domestic 

Count of Proposed Use	Post-use	
Pre-Use	Domestic	Grand Total
Advice	61.67%	61.67%
No Objection	3.33%	3.33%
Objection	35.00%	35.00%
Grand Total	100.00%	100.00%

Appendix G: Future Implementation – Email Preface and Online Questionnaire for LPA Officers

Email Preface:

Dear [LPA Officer],

We are conducting a survey to assess the impact of HB&P on the application process and would greatly appreciate your voluntary participation. Your insights will help us better understand the effectiveness of HB&P's role and identify potential areas for improvement.

If you are willing to contribute, please take roughly 5 – 10 minutes to complete the survey [Survey Link]. Your responses will remain confidential and will only be used to enhance the consultation process. If you have any questions or need further information, please not hesitate to reach out.

Regards,

[HB&P]

Online Questionnaire

1. How would you rate the overall consultation outcome with HB&P?
 - a. Very helpful
 - b. Helpful
 - c. Somewhat helpful
 - d. Not helpful
2. How thorough and clear were HB&P's comments provided in their consultation letters?
 - a. Very detailed and clear
 - b. Mostly detailed and clear
 - c. Somewhat unclear
 - d. Not clear at all

3. How would you rate HB&P's responsiveness to follow-up inquiries during the consultation process?
 - a. Excellent
 - b. Good
 - c. Average
 - d. Poor
4. How would you characterise your awareness of the role that HB&P plays in the planning-decision processes?
 - a. Very well – know their role and services clearly
 - b. Somewhat – general idea, but not all the details
 - c. Not well- heard of the name, but might now know exactly what they do
 - d. Not at all – no idea of who they are or what they do
5. How involved was your community with these cases, if at all?
 - a. Notably involved
 - b. Somewhat involved
 - c. Neutral
 - d. Not involved
6. Do you feel that the comments provided by HB&P assisted in your final decision on these cases?
 - a. Agree
 - b. Somewhat Agree
 - c. Neutral
 - d. Somewhat Disagree
 - e. Disagree

7. Did HB&P provide insightful comments in a reasonable timeframe?
 - a. Always – everything was well within the 21-day period
 - b. Most of the time – minor delays but acceptable
 - c. Sometimes – noticeable delays
 - d. Rarely – frequently late or required follow-ups
8. (Optional) Are there any specific areas where you feel HB&P could improve?
 - a. Open ended
9. (Optional) If you have any specific feedback about cases, please submit it here
 - a. Open ended

Thank you again for taking the time to complete this questionnaire. We value the specialised insight that you have provided, and we look forward to continuing working together in future efforts.