



# HISTORIC ENVIRONMENT SCOTLAND ESTATES PEER REVIEW 2018-19

November 18 – March 2019



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## I. INTRODUCTION

In March 2019 the first Estates Peer Review report was published, covering the activities of the Peer Review panel from October 2017 – October 2018. It is available to view online: <https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=be91f77a-9098-42a5-89ff-aa1100bc61ab>

That report stated the intention to bring the Peer Review reporting period in line with other annual reports by means of a shorter supplementary report.

Accordingly this report covers the period from November 2018 to March 2019 to align the reporting period and conclude reporting for 18/19. It is intended that this report is read in conjunction with the previous publication to provide full context of the process and people involved.

Within the November 2018 – March 2019 period a single round of reviews took place reviewing projects at three different properties in care.

## 2. THE PANEL

Members active during this period are:

- Dr. Paul Stollard, Chair of the Panel & HES Board Member
- Bryan Dickson, National Trust for Scotland, Head of Buildings Conservation (Policy)
- Colin Proctor, Scottish Futures Trust, Asset Management Director
- Neal O’Leary, Cadw, Head of Conservation & Estates
- David Narro, David Narro Associates, Chairman
- Stuart MacPherson, Irons Foulner Consulting Engineers, Founder
- Prof. Sian Jones, University of Stirling, Chair in Environmental History and Heritage
- Prof. Ian Simpson, University of Stirling, Professor of Geography & Environmental Sciences
- Tina Pringle, National Building Specification at RIBA Enterprises Ltd, Head of Technical Information
- Lucy Stewart, Stewart Architects, Conservation Architect and sits on the RIAS Conservation Committee
- Peter Robinson, Scottish Canals, Head of Engineering - Peter Robinson joined the panel and attended his first meeting 27 March 2019
- Stewart Wright, English Heritage, head of Survey and Asset Management - Stewart Wright consented to joining the panel from March 2019 but was unable to attend any meetings in the 18/19 period.

### 3. SITE VISITS & PANEL REPORTS

At the full panel meeting in October 2018 five projects were offered to the panel by the Estates team. The panel then voted to select three to go ahead for review. The below table outlines the projects offered and which were ultimately reviewed.

Project	Reviewed
Corgarff Castle: Reharling External Curtain Wall	6 March 2019
Holyrood Parks: Path Erosion Works	29 January 2019
Inchcolm Abbey: Jetty Pier Repairs	Not picked
Melrose Abbey South Transept: Conservation Of Structural Ornament	8 February 2019
Stirling Castle: Great Hall Conservation Works	Not picked

Each review consisted of three panel members, a team of HES Staff who were involved in the project plus a member from the Estates Management team responsible for facilitating the peer review process.

Following each visit the panel members would co-ordinate a report commenting on the works they had seen and assessing each project to identify areas in which the Estates team are working well, and areas where processes or procedures could be improved.

## 4. LESSONS LEARNED

As with the previous rounds the reviews submitted by the Peer Review Panel members have been generally positive. The feedback, both complimentary and constructively critical continues to be appreciated by the HES Estates team.

The issues that were raised in the final round of 18/19 reviews are a combination of some that were raised previously plus a few additional points for consideration. They are summarised below.

### 4.1. Conservation Principles and Standards

As noted in the previous report these continue to prove a strong point in the way that the HES Conservation Directorate carry out works. In the report on the Melrose Abbey applied conservation works it is noted that ‘conservators are clearly at the top of their field and the works undertaken were to an extremely high standard’.

The Holyrood Park path erosion works were also praised for ‘addressing shortcomings of the present path arrangements’, ‘compliance with regulatory procedures relating to SSSI, SMC and so forth’ and ‘attention to wider natural environment and ecology’. The path repairs at Holyrood were also a good example of sensitivity towards areas of unknown archaeological significance and a sympathetic approach to the landscape.

Only one minor negative point was raised at Corgarff Castle where an opportunity to involve conservation science has perhaps been missed, although the HES response did note that previous intervention in the 1960s had destroyed any historical material that would have been worthy of scientific analysis.

### 4.2. Annularity of Budgets

The problems caused by the annual approval of budgets was again seen to be an inhibiting factor to conservation works. The Melrose Abbey report saw it as ‘very restrictive’ and ‘not helpful in the ‘real world’ of construction to have annually approved budgets, as often the money appears to arrive very late in the building season and works are often undertaken at unsuitable times of the year.’ This

echoes the concerns raised in the previous report raised with regard to annual budgets.

The unpredictable nature of funding was also identified in the report on the Holyrood Park path works.

### **4.3. Hidden Project Costs**

The review of Corgarff Castle reharling highlighted the issue relating to HES reliance on internal labour, as had previous rounds of the Peer Review process. The report noted ‘that within HES budgets the cost for this project was expressed essentially as material and access costs.’ By applying an indicative cost against the MCU labour involved HES could more effectively compare with traditional external contractor delivery and more clearly articulate the benefits of delivering such works in house.

### **4.4. Post Project Evaluation**

This was a new theme that appeared in this round of reviews. It was felt that in some instances HES Conservation work would benefit from improved post project evaluation. This was most relevant with the path works at Holyrood Park where the specialised nature of the works made it a potentially challenging project to describe the works for tender and budget accordingly. It was felt that recording this information and collating with historical works of such a nature would allow more reliable estimates for future works to be established.

The Estates team does have a system of post project reviews in place though these are rarely completed due to other priorities. The intention to complete a review at the conclusion of the Holyrood Park works was noted, however, which is promising.

During the Melrose Abbey review the idea of an informal review meeting was also raised as a valuable way to get project teams together to discuss and reflect on how a project had gone. An informal discussion of such matters might be a good way to achieve this project review in light of restrictions of time due to other work pressures.

## **4.5. Outreach and Engagement**

It was felt that both the Holyrood and Melrose projects were good opportunities for developing skills and awareness of the types of work involved. At Holyrood contractors were encouraged to employ apprentices during the works and the Holyrood Park Ranger service were praised for explaining the works to school groups visiting the park. While the Melrose Abbey works were used for Insights Tours to engage with the public it felt like awareness of the conservator career path could have been more strongly promoted. Future works at Melrose were also discussed which, due to their location, will be much more appropriate for engagement with the public and may better harness the opportunity to promote the work of stone conservators.

Corgarff was noted as having limited engagement opportunities, but due to the remote location of the site it was felt that there would be so little return for any investment in developing these opportunities that this lack of engagement was justified.

## **4.6. Forecasting Erosion from visitors and climate change**

The discussions during the Holyrood Park review considered the impacts of both visitor use and climate change in causing erosion. Some survey work had been carried out to understand this but it was felt that there may be value in increased visitor tracking combined with gathering qualitative data on visitor attitudes and intentions. Climate change modelling was also raised as a possible exercise which would have value in helping to plan future conservation in the park and improving the resilience of the site. It was noted in HESs response that this was a developing process and something the team would be keen to engage with in future, though it would rely in part on contributions from out with the Estates team.

At Corgarff too it was felt that, due to the challenging location of the monument, some level of research and knowledge sharing would be good to look at conservation works and how certain material specifications cope in such a climate.

#### **4.7. Scheduled Monument Consent**

There were some potential issues noted with the current consent process. Now that HES no longer benefits from assumed consent the application process adds an extra stage, and potential delays, to the project process. Different levels of approval (such as the Church of England Faculty system) were raised as a potential solution, and it was noted that Section 17 and Class 5 consent gives HES a degree of flexibility in reacting to necessary works.

The extent of the knowledge of those granting consent was also queried, with particular reference to an incident where the conservators' use of a metal detector to detect ferrous metal was questioned as a result of misunderstanding, or misinterpretation of relevant legislation. It was discussed whether SMC decision makers could be better informed about certain specialist practices, the issues at site level and the range of consequences resulting from various options considered during SMC decision making. Some level of information sharing was discussed, however it was accepted that this is a sensitive issue due to the necessary relationship that needs to be maintained between HES Conservation teams and those granting SMC.

#### **4.8. Scaffolding Costs**

At Melrose Abbey discussions were carried out about the significant cost in to Conservation in renting scaffold and relying on external scaffolding contractors. Increasingly scaffolding is purchased by HES for long term projects, but it is identified that the ongoing cost to the organisation in paying for scaffold inspection is significant.

#### **4.9. Conservation Plans**

At Corgarff Castle the reviewers felt that the history and vision for the monument would benefit from an overarching Conservation Plan. This would bring together several documents that currently sit separately and fill a number of gaps relating to the intended future and management of the monument. Regarding the intention and drive behind the works the report noted that HES staff 'could

articulate these issues, however this information was not clearly documented therefore risk associated with loss of corporate understanding exists'.

## A. APPENDIX: PANEL REPORTS AND ASSOCIATED PROJECT INFORMATION SHEETS

## CORGARFF CASTLE: REHARLING EXTERNAL CURTAIN WALL

Location	Corgarff Castle, Strathdon, AB36 8YP
HES Investment Plan Category	Conservation
Conservation Directorate Prioritisation Category	Structural Stability
HES Benefits and Opportunities	Sustainability
Budget Cost	£30,000 in 17/18, £27,000 in 18/19
Project Dates	April 2017 – July 2018
Project Status	RIBA Plan of Works Stage 7 (In Use)
Project Delivery	Conservation Directorate and MCU teams
Project Team	Conservation, MCU, Heritage Management
Point of contact	Michael Pendery, District Architect Mike.Pendery@HES.scot
Scope of Review	Conservation standards and principles

**At Corgarff Castle the external curtain wall harling had deteriorated to a point it was not suitable for patch repairs.** On investigation it was found that the capping detail to the walls contributed to this as there was not enough of an overhang to shed water. Instead it was simply running down the face of the wall or into the joints, accelerating the decay.

The harling had been replaced relatively recently which suggested the harling was unlikely to be the issue, it was decided between the District Architect, District Works Manager and the district team to replace the cap stones and reharl the walls.

This visit will highlight the challenges involved in working on this extremely exposed site and the application of conservation techniques to achieve the best results.



## HOLYROOD PARKS: PATH EROSION WORKS

Location	Holyrood Park, Edinburgh
HES Investment Plan Category	Visitor Facing
Conservation Directorate Prioritisation Category	Health and Safety
HES Benefits and Opportunities	Sustainability, Community
Budget Cost	£30,000 in 2017/18
Project Dates	Jan to Mar 2018
Project Status	RIBA plan of works stage 7 (In Use)
Project Delivery	Conservation Directorate and MCU teams, External Contractor
Project Team	Conservation, MCU, Heritage Management, Park Rangers, Cultural Resources
Point of contact	Karen Williamson, District Architect Karen.Williamson@HES.scot
Scope of Review	Project Scoping & Delivery, Access in SSSI Site, High Visitor numbers

**At Holyrood Park there had long been issues with visitors to the park deviating from designated routes on a regular basis.** In many cases this was understandable due to the poor condition of the existing paths in places, and in turn a lack of clarity over which pathways were specifically provided for visitor flow. As much as roaming is encouraged on the whole, the volume of visitor flow in the park obliges a level of management so as to mitigate adverse effects on the surrounding landscape.

To address this frequent concern, a project was designed to improve the pathway provision for visitors. Once an appropriate route was agreed, the design needed to incorporate adequate drainage, appropriate materials application, and widening of the pathway where necessary. In addition, challenges were faced with the logistics of materials on site to areas where accessibility was more difficult. Due to the SSSI designation of the site, there were also specific considerations with the consents process.

This project will display the complexities of managing visitor flow at a very unique site. It involved many stakeholders, both internal and external.

Another stage of works is being planned to which the feedback from this visit should prove invaluable.



## MELROSE ABBEY SOUTH TRANSEPT: CONSERVATION OF STRUCTURAL ORNAMENT

Location	Melrose Abbey, Melrose, TD6 9LG
HES Investment Plan Category	Conservation
Conservation Directorate Prioritisation Category	Structural Stability of Carved Ornament
HES Benefits and Opportunities	Sustainability
Budget Cost	Scaffold £10K, Staff Costs approx. £50K
Project Dates	September 2018 - Present
Project Status	Active
Project Delivery	Conservation Directorate and Applied Conservation Conservators.
Project Team	Conservation, Applied Conservation, MCU, Heritage Management
Point of contact	Stephen Gordon, Head of Applied Conservation Stephen.Gordon@HES.scot
Scope of Review	Conservation standards and principles

**At Melrose Abbey there has been an on-going programme of surveying followed by conservation and repair of structural carved detail.** This latest phase of work follows on from a previous exercise to treat the south aisle of the abbey. A fall over the winter months of a significant carved feature further added to the case for urgent intervention.

An initial survey was undertaken by the Applied Conservation team from a hoist following which a full scaffold was erected to allow access to the areas concerned. Conservation reports were prepared before work commenced to allow Heritage Management to comment on the proposals and agree to the works.

Treatment consists of selectively removing biological growth to expose the underlying stone.

Consolidating areas of fracturing, delamination and other decay to stabilise the carved detail. Re-attaching loose and detached carving using stainless steel pins and undertaking discrete pointing to harmonise the repairs and prevent further loss.

As well as recording all the treatment the team is undertaking close range 3D laser scanning to digitally record specific carved features that are generally inaccessible at other times. This will be used for future condition monitoring, etc. The project is due to be completed by the end of November 2018.



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