

Valuing the Welsh Historic Environment

A Monitoring Framework



Commissioned by:



Cefnogwyd gan
Y Loteri Genedlaethol
trwy Gronfa Dreftadaeth y Loteri



For more information phone the National Trust on **02920 462 281**

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Introducing the Monitoring Framework

In February 2010, ECOTEC Research and Consulting Ltd was commissioned by the Valuing our Environment Partnership to undertake research to assess the value the Welsh historic environment sector, both in strict economic terms but also in terms of its wider social value. As part of this work, ECOTEC has recommended a consistent methodology for ongoing data capture by partners in the sector to understand the value of the Welsh historic environment.

The monitoring framework is designed to be used by organisations operating in the 'inner cog' of the historic environment (as defined below).

Defining the Welsh Historic Environment

The 'inner cog' of the historic environment sector has been defined as comprising those organisations that can be considered to be at the core of the historic environment sector (i.e. activities concerned with the protection, enhancement and conservation of the historic environment sector): (1) large employers and grant bodies, such as Cadw, the National Trust, the Countryside Council for Wales and the Heritage Lottery Fund, (2) smaller organisations, such as trusts and societies, all of whose principal *raison d'être* is the preservation and conservation of the historic environment, (3) relevant sections of the Welsh Assembly Government and local authorities, and (4) organisations providing specialist archaeological and architectural services.

There is no universally recognised definition of the historic environment sector. For the purpose of this monitoring framework, the historic environment sector 'inner cog' has been defined as follows.

Defining the historic environment sector 'inner cog'

Organisations that are active in conserving, maintaining and managing and/or creating access to Wales' historic environment. In particular, the monitoring framework should focus on the following assets:

- Scheduled ancient monuments / archaeological sites
- Listed buildings
- Conservation areas
- Registered historic gardens/designed landscapes
- Registered historic landscapes
- Marine historic landscapes
- Museums / heritage centres, where they are located within a historic building/ asset

Applying the Monitoring Framework

ECOTEC has developed the monitoring framework to offer a simple and replicable method for assessing the value of the Welsh historic environment, in terms of assessing its economic, environmental and social value. ECOTEC recommends that, as a minimum, all organisations in the historic environment 'inner cog' should endeavour to collect data to support the indicators set out in the monitoring framework. Furthermore, in all cases, the definition of the historic environment outlined above should be applied when gathering data. For those organisations that undertake work that extends beyond the definition outlined above, organisations should endeavour to identify the proportion of their work that can be attributed to the historic environment, as defined above. We would recommend that the historic environment sector collates as much of this data as possible on an annual basis.

Limitations of the Monitoring Framework

The monitoring framework has been designed to be simple and replicable, thus ensuring that consistent data to demonstrate the value of the Welsh historic environment is collected. However, the monitoring framework has a number of limitations:

- It is important to note that the definition of the historic environment that has been adopted for this work does not capture all historic environment assets, for example a significant proportion of the historic environment is not designated. However, by adopting this definition, we can ensure that ongoing monitoring processes will be transparent, clear and easily replicable. It will be necessary for organisations in the historic environment to review the definition on an ongoing basis to ensure that it remains appropriate. Historic environment organisations may also wish to gather supplementary data that falls outside of this definition to add value to the analysis, for example the number of historic environment records held in the National Monuments Record for Wales and the Historic Environment Records, plus information from the Historic Landscapes Register, would be readily accessible but contain information that falls outside the definition outlined earlier.
- The framework has focussed on indicators that allow quantifiable data to be collected in a consistent manner. It is, therefore, important to note, that the framework does not capture all the benefits of the historic environment; instead it highlights a sample of key economic, environmental and social benefits that can be monitored by the sector, thus going some way to demonstrating the diverse range of outcomes the historic environment contributes towards. In reality, there are a range of much softer benefits that can be attributed to the historic environment, which are much harder to quantify. In light of this, ECOTEC suggests that the historic environment sector develops a series of case studies (as highlighted in the Valuing the Welsh Historic Environment report) to support the data gathered through the monitoring framework. These will provide an opportunity to capture some of these wider benefits that further demonstrate the value of the Welsh historic environment. They can also be an effective means of highlighting the effects of what might happen if the historic environment is not protected and managed.

The Monitoring Framework

The monitoring framework has been structured around the following headings:

- Historic environment assets
- Historic environment activities
- Economic value
- Environmental value
- Social value

The following tables set out the key indicators, including a description of each indicator, which will aid data collection.

Historic environment assets

Indicator	Description
Number of listed buildings	To establish the total population of historic assets - actual and potential. There is a need to establish the nature of any growth in the historic environment in the next 5 to 10 years.
Number of scheduled ancient monuments	
Number of designated historic wrecks	
Number of conservation areas	
Number of registered historic parks, gardens and landscapes	
Number of World Heritage Sites	
Number of museums / heritage centres, where they are located within a historic building / asset	

Historic environment activities

Theme	Indicator	Description
Tourism	Number of visitor centres whose principal focus is on the historic environment	To further establish attribution. Identify what proportion of visitor centres' output can be attributed to the historic environment.
Education	Number of visits by educational institutes to historic assets	Including the number of different educational institutes that the historic environment engages with.
Education	Number of historic environment training courses delivered	Focus on specialist training courses that are specific to, based at or utilise an historic asset, e.g. traditional craft skills. Record information on the length of the courses.
Education	Number of historic environment resources developed	For example, educational resources, visitor resources, online archives, TV programmes.
Participation	Number of historic environment events delivered	Including nature of events.
Participation	Number of historic environment conferences	Including nature of conferences.

Economic value

Theme	Indicator	Description
Employment	<p>Number of full time permanent employees working in the historic environment</p> <p>Number of part time permanent employees working in the historic environment</p> <p>Number of seasonal full time employees working in the historic environment</p> <p>Number of seasonal part time employees working in the historic environment</p>	<p>Calculate the total full time equivalent permanent employees.</p> <p>Calculate the total full time equivalent seasonal employees.</p> <p>FTE calculation method = If an employee dedicated 18.5 hours per week on the historic environment this would represent 0.5 full time equivalent employees, based on a 37 hour week – $18.5/37 = 0.5$</p>
Employment	Number of associates working in the historic environment	Calculate the total full time equivalent associates (calculated as above).
Employment	Number of work placements / apprenticeships / internships	Including the length of the work placements / apprenticeships / internships.
Expenditure	<p>Total expenditure on the historic environment:</p> <ul style="list-style-type: none"> - Total expenditure on wages / salaries - Total expenditure on education, promotion and interpretation of historic environment assets - Total expenditure on maintaining and conserving the historic environment - Total expenditure on recording and researching the historic environment - Total expenditure via grants. 	<p>Total expenditure will form the basis for calculating the direct, indirect and induced contributions of the historic environment.</p> <p>Consider capital and revenue costs.</p>
Income	Total income (sales / turnover) generated from the historic environment	Focus on sales (e.g. admission charges, income from gift shop etc).
Leverage	Amount of private sector investment secured for every £1 of public sector funding	Levered investment per £1 of spend.
Business	Proportion of spend on raw materials / inputs sourced locally, regionally and nationally	Value and source of inputs will establish multiplier effects.
Tourism	<p>Total number of visitors to paid attractions</p> <p>Number of visitors to unpaid attractions or unstaffed sites</p> <p>Visits to historic assets as a percentage of all recorded visits to Wales in a year</p>	<p>To establish relationship between tourism and business/community use.</p> <p>Collect data at a representative sample of unpaid attractions / unstaffed sites to gather an average.</p> <p>Based on Visit Wales data.</p>
Tourism	<p>Average adult admission charges</p> <p>Average total spend by visitor at historic attractions</p>	Value of tourism spend.

Environmental value

Theme	Indicator	Description
Environmental quality	Number of historic assets at risk	Identification of challenging sites.
Environmental quality	Number of local sites where positive conservation management is being implemented	Captures the role of the historic environment in supporting environmental quality and biodiversity.
Environmental quality	Number of local sites where priority species are present	Captures the role of the historic environment in supporting biodiversity. Where possible, identify how many priority species are present. See UK Biodiversity Partnership for guidance.
Environmental quality	Number of assets that have or are in the process of establishing energy efficient operations	Captures energy efficiency within the historic environment, including low carbon.
Environmental quality	Proportion of respondents that answered to a great extent / to some extent to the following question? "To what extent does the historic environment contribute to the character and quality of the area you live in?" (to a great extent, to some extent, not at all)	Where possible, incorporate in surveys.

Social value

Theme	Indicator	Description
Education	Number of people attending historic environment training courses Number of new (recognised) historic environment qualifications gained	Provides an indication of the nature of participation of the local community in education. Qualifications gained at an historic environment asset or focussing on the historic environment, e.g. traditional building skills, conservation.
Education	Number of pupils / students participating in educational visits to historic environment sites	Volume and throughput.
Education	Number of respondents that answered very important / important to the following question: "When trying to improve local places how important is it to save their historic features?" (very important, important,	Where possible, incorporate in surveys, e.g. Wales Opinions Survey.

Theme	Indicator	Description
	unimportant, very unimportant)	
Participation	<p>Number of respondents that answered very important / important to the following question:</p> <p>"How important is it that people have the opportunity to visit historic buildings and monuments in Wales?" (very important, important, unimportant, very unimportant)</p>	<p>Where possible, incorporate in surveys, e.g. Wales Opinions Survey.</p>
Participation	<p>Number of respondents that answered very interested / interested to the following question:</p> <p>"How interested are you in understanding the heritage of Wales?" (very interested, interested, uninterested, very uninterested)</p>	<p>Where possible, incorporate in surveys.</p>
Participation	Number of members of historic environment organisations.	Number and throughput.
Participation	Number of people attending historic environment events	Events may be at an historic environment asset or primarily focussed on the historic environment.
Participation	Number of people attending historic environment conferences	Conferences may be at an historic environment asset or primarily focussed on the historic environment.
Participation	Number of people purchasing / viewing resources	For example, books, television programmes, online resources.
Social capital and community cohesion	<p>Number of volunteers</p> <p>Number of volunteer hours</p>	Voluntary opportunities.
Health	Number of people participating in health-related activities	Numbers using the historic environment to improve health and undertake exercise, including walking, cycling etc.
Crime	Proportion of residents who feel that: "The level of anti-social behaviour and criminal activity in and around the historic asset appears to have increased / stayed the same / decreased"	<p>Examples of the historic environment playing its part in inclusion.</p> <p>Captures perceptions of crime.</p> <p>Where possible, incorporate in surveys.</p>