Historic England

Audience Insights:
Review of Historic England's Online Advice and Guidance

Final Report
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Executive Summary

Overview of Historic England's advice and guidance

Historic England's (HE) advice and guidance is developed in alignment with Government policy concerning the historic environment. It plays an important role in aiding interpretation, so that heritage specialists can undertake their work more effectively, steer sustainable management practices in the historic environment, support credible and consistent decision-making across the planning system, and inform heritage-led regeneration.

HE's advice and guidance is open to a wide range of potential audiences, including local authority architects, conservation officers and planners; private contractors and consultants; national and local societies; historic building owners and managers; as well as members of the public.

Main drivers for this review

Heritage 2020	2016 Culture White Paper	Historic England Corporate Plan
Sets out how heritage organisations work together to benefit the historic environment, including ways of improving collaboration and delivering better advice and guidance.	Sets expectations for HE to deliver improved support and guidance for local authorities.	This sets out HE's commitment to helping those who care for historic buildings and places, including owners, local authorities, communities and volunteers.

Key research question:

Is Historic England's online advice and guidance getting the right information across to the right audiences in the best possible way?

Finding to inform:

HE's strategy for developing advice and guidance and building capacity, including priorities and spending in this area for the next eight to ten years.

Methodology

The multi-faceted methodology for this audience insight research comprised a desk review of HE advice and guidance sources; 13 stakeholder interviews; an online survey of users and non-users of HE advice and guidance (423 responses); 40 follow-up telephone interviews with a cross-section of survey respondents; and two roundtable discussion forums. All research took place between April and October 2017.

About HE's advice and guidance

HE's advice and guidance is organised in a dedicated *Advice* section of its website. Its extensive range of web pages and 450-plus electronic PDF documents are organised within the following broad categories:

- Your home;
- Planning;
- Latest Advice and Guidance;
- Caring for Heritage;
- Technical Guidance;
- Heritage at Risk;
- Constructive Conservation; and
- The Heritage Protection Guide.

Main user expectations of HE's advice:

Informed – Well written – Authoritative – Comprehensive – Reliable – Useable

User views on the content and coverage of HE advice and guidance

Perceived strengths

- ✓ Praise for the broad spread and wide audience-reach

- ✓ Generally considered authoritative, well researched, well written and trustworthy

- ✓ Often the 'go to' resource for users (although a range of other advice and guidance is also consulted)

- ✓ Covers topics that users say they are unable to find elsewhere

- ✓ Viewed as supporting existing policies and standards in the sector extremely well

- ✓ Highly rated by users in terms of being accurate and well informed (scored 8.2 out of 10)

- ✓ 75% of survey respondents consider the level of detail to be 'about right'

Perceived limitations

- ❖ The purpose and target audience is not always clear, with some sources considered long-winded and difficult to interpret

- ❖ Comparatively lower user ratings relating to content being up-to-date, impartial and objective – although still high overall (7.8 out of 10)

- ❖ Occasional observed inaccuracies in content leading to perceptions that the author might not possess fully up-to-date knowledge;

- ❖ Minority find certain sources too high-level, vague and with insufficient technical detail for professionals

- ❖ Above-average 13% of building owners and managers consider the level of detail to be 'too complex', compared to just 1% overall who hold this view

- ❖ Lack of real-world examples and case studies in some documents (e.g. Tower of London)

User views on the structure and style of HE advice and guidance

Perceived strengths

- ✓ Easy to access in terms of length, document structure, language and favourability towards the variety of ways in which data and information are presented

- ✓ Highest levels of user satisfaction relate to clarity of language, usefulness of titles and balance of text, photos and other graphics

Perceived limitations

- ❖ Lowest levels of user satisfaction relate to how content is indexed and organised on the website, including ability to cross-refer to other sources and website navigability

- ❖ Website search tool is not intuitive and document titles are often not revealed through searches, even where they are known to exist (unless the exact and full title is searched for)

Use of HE advice and guidance in practice

- The most popular reasons for using HE advice and guidance include improving own knowledge and awareness, assessing the significance of heritage assets, and researching heritage assets;

- Local authorities use HE advice and guidance to inform planning briefs and reports, "add weight" to their own professional advice, to provide them with additional specialist knowledge and to help assist members of the public;

- Contractors find it useful to identify good practice approaches and plug gaps in knowledge;

- Societies find it helpful for consulting building listing descriptions, identifying whether any features may be put at risk from development, and contributing to planning consultations;

- Reported cut-backs of the local authority conservation officer role mean that planning specialists often require additional and detailed guidance on buildings/conservation matters;

- Google analytics data reveals that 75% of users arrive on one of the most popular advice and guidance pages via an organic search engine, rather than using the website's own search facility (potentially ties in with issued navigating the website);

- Users access HE advice and guidance with mixed frequencies, with local authorities and contractors the most frequent users;

- Among experienced users, the biggest barriers to accessing advice and guidance are being unable to find what they need and the content being out of date;

- Among surveyed non-users, the majority say they were not aware that HE produced advice and guidance.

Shaping the future – recommended actions

❖ **Improving access, website navigability and indexing:** There is a need for HE to improve how advice and guidance is organised and made available to users online, to improve the ease and speed of access;

❖ **Better tailoring of content for different audiences:** HEs should focus on making the purpose and target audience of its advice and guidance clearer, to increase engagement of users (and current non-users) through more relevant content;

❖ **Stronger internal coordination:** HE should work to ensure that its own staff involved in producing advice and guidance take a strategic and joined-up approach to responding to priority advice needs in a consistent way;

❖ **Drawing on other examples of good practice:** HE should consider how advice and guidance is successfully produced, disseminated and promoted by other organisations in the sector, to explore ways of further strengthening its own content and to reach a wider audience;

❖ **Increasing collaboration across the sector**: By forging stronger collaborative working arrangements with other historic environment organisations, the currency, efficiency and accessibility of advice and guidance could be further improved;

❖ **Identifying and prioritising new content:** Based on ideas and suggestions from users, supported by its own intelligence, HE should consider introducing new advice and guidance topics that users say they need, or improve signposting/tagging where this already exists but may not be obvious;

❖ **Wider consultation on new topics:** HE should consider being more widely consultative across the sector when developing advice and guidance, to avoid a situation where content is occasionally perceived as rushed and questions raised concerning its accuracy;

❖ **New registration facility for user updates:** This would enable users to subscribe to updates about new and upcoming advice and guidance (revealed to be strong support from the research);

❖ **Development of training tools:** There may be merit in developing a series of structured online training modules, using a variety of delivery platforms (e.g. online tutorials, webinars, videos and podcasts) and these should be clearly pitched to their target audience. Additional research could help to identify potential content, delivery solutions and what else already exists in the marketplace.

1. Introduction

1.1 HE advice and guidance in context

Protecting the beauty, cultural appeal and historic significance of England's historic environment requires specialist knowledge, skills and sensitivity to the local setting. It also depends upon individuals appreciating the important role that heritage assets play in maintaining a sense of place and appeal to the general public.

Effective advice and guidance has a vital role in helping specialists to undertake their work more effectively, steer sustainable management of the historic environment, support credible and consistent decision-making in the context of the planning system, and inform heritage-led regeneration.

Legislation and policy affecting the historic environment is set by the Department for Digital, Culture, Media and Sport (DCMS). This feeds into the National Planning Policy Framework (NPPF) and associated guidance (NPPG) managed by the Department for Communities and Local Government (DCLG).

As a non-departmental public body sponsored by DCMS, Historic England (HE) produces advice and guidance on a broad range of subjects written for many different audiences. This in turn guides the management of change to heritage assets (notably through the planning system), protects heritage assets through expert work, improve understanding, minimise conflict and mitigate risk.

Professional bodies in the sector also have an important role alongside Historic England in setting standards for their members. These tend to be enforceable via professional conduct procedures by which members are held to account. They often require a commitment to Continuing Professional Development (CPD) but are not binding on non-accredited practitioners unless stipulated in a contract.

In recent years, the tide of deregulation, particularly in relation to the planning system, means that any new standards, advice and guidance for the historic environment must not been seen to place a 'burden' on sustainable development. Furthermore, it is a requirement that Historic England and other publicly funded bodies do not introduce any new 'should' or 'must' policy unless this aligns with Government policy.

1.2 Building capacity through effective advice and guidance

The *Heritage 2020* framework[1] sets out the shared strategic priorities for organisations working together to maximise the public benefit of the historic environment. A key

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[1] Heritage 2020: Strategic priorities for England's historic environment 2015-2020

component of *Heritage 2020* is the need to improve capacity building, which means having appropriately skilled people within communities who have access to relevant information and data, infrastructure, facilities, tools and equipment (both traditional and modern).

Sustaining that capacity means enhancing the knowledge of decision-makers and the expertise of heritage practitioners to ensure they continue to meet the needs of communities, owners and developers. It has therefore become a key priority for the sector to improve advice, guidance and training and to ensure that asset owners have a better understanding of their rights and responsibilities.

Steps already taken to improve collaboration have included developing a more strategic approach to risks and opportunities, building stronger bridges with higher education, encouraging all parts of the sector to develop a better understanding and appreciation of the historic environment, and working closely with agencies, local authorities and the private sector to ensure that up-to-date information about the historic environment is digitally accessible to all, now and in the future[2].

The 2016 *Culture White Paper* observed that local communities, entrepreneurs and voluntary sector groups working in relation to historic buildings may lack capacity, finance and skills. A need was therefore identified for national heritage organisations to provide the right support, and Historic England was tasked to look at ways of producing clearer advice and guidance and encouraging new delivery models that make the best use of available resources[3].

1.3 Research objectives and methodology

This report provides insights into how well Historic England's online advice and guidance conveys the right information to the right audiences in the most accessible and effective way.

Specific objectives of the review were to:

1. Gather detailed insights from across the historic environment sector about users' experiences of Historic England's written advice and guidance, including what aspects are helpful and less helpful;

2. Review how other Government departments and agencies produce and deliver digital guidance, including tools, systems, presentation, as well as decision-making processes on what to develop and publish;

3. Explore how advice and guidance could be improved in order to directly respond to barriers experienced by users, and what types (if any) of alternative technologies or approaches are needed;

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[2] Heritage 2020: Strategic priorities for England's historic environment 2015-2020
[3] Department for Culture, Media and Support (2016) *The Culture White Paper*

4. Provide evidence-based recommendations which will inform how advice and guidance should be shaped in the future, including what to retain, what changes should be made and why.

Historic England is looking to use the findings to inform: 1) its strategy for developing future guidance, including proposed spending in this area over the coming years; and 2) decisions about future integration between Historic England's guidance work and other forms of capacity building for the sector.

The research was divided into two main phases (below):

PHASE 1: Scoping research, including:

1. High-level review of the characteristics of Historic England's written (electronic) advice and guidance (sample of 20 sources);

2. Review of advice and guidance produced by other historic environment organisations, to explore any synergies and differences in approaches taken (sample of 20 sources, including ten scoping telephone interviews);

3. Review of advice and guidance produced by non-historic environment organisations to explore alternative approaches and examples of good practice (sample of 20 sources, including three scoping telephone interviews).

PHASE 2: Primary research, incorporating:

1. Online survey of users and non-users of Historic England advice and guidance, to explore how advice and guidance is used, its effectiveness, and how it could be improved (423 responses);

2. 40 follow-up in-depth telephone interviews with survey participants to examine strengths, weaknesses and possible areas of improvement;

3. Two roundtable discussion forums with historic environment stakeholders (including a meeting of the Joint Committee of the National Amenity Societies – JCNAS) to help shape the future of Historic England's advice and guidance.

The online survey was promoted using a direct email campaign by Pye Tait Consulting; via historic environment organisations to their members and networks; via a pop-up form on the Advice pages of HE's website; and using other forums and social media such as JISC, LinkedIn groups and Twitter.

The following Historic England advice and guidance was out of scope for the review:

- Advocacy and procedural guidance (for example Constructive Conservation publications and Guidance for Grants documents);

- Case-by-case advice services delivered in person by Historic England's experts; and

- Research Reports, Research News, Historic England newsletter, Heritage Counts and Heritage at Risk documents.

1.4 About this report

This report is organised thematically and combines the findings from the desk research, survey, interviews and workshops.

Survey results use charts and associated descriptive analysis, including breakdowns and observations by user group where relevant. More information about the user groups, including total survey respondent numbers, can be found in Appendix 1.

All charts show the base number of respondents (or 'responses' for multi-response questions) and percentages may not always add up to precisely 100% due to the impact of rounding.

2. Content and Coverage

2.1 Types of content and target audiences

HE's advice and guidance is organised in a dedicated *Advice* section of its website. A combination of web pages and approximately 350 electronic PDF documents are available, supplemented by a website search tool intended to help users find what they need.

The advice and guidance is open to a wide range of potential audiences, including local authority architects, conservation officers and planners; private contractors and consultants; national and local societies; historic building owners and managers; as well as members of the public.

Main categories of advice and guidance on HE's website include[4]:

- Your home;
- Planning;
- Latest Advice and Guidance;
- Caring for Heritage;
- Technical Guidance;
- Heritage at Risk;
- Constructive Conservation; and
- The Heritage Protection Guide.

Observations:

- The *Latest Advice and Guidance* section includes a PDF document titled *Advice and Guidance – New titles and backlist*. This sets out recently published documents, forthcoming publications and an A-Z backlist.

- Where advice and guidance documents have been archived (e.g. *Golf in Historic Parks and Landscapes*, published 2007) their host web pages include a supplementary note stating that the guidance is either out of date or has been superseded, although for older documents in particular, it is not always specified which one of these is the case.

- While certain HE advice and guidance sources make their purpose explicitly clear in the title, for example *Maintaining an older home* or *Managing wildlife and habitats*, this is less obvious in other cases, such as the web page *Heritage Consents,* which explains the different legal consents and permissions affecting historic buildings and places.

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[4]Categories are correct as at October 2017.

- Some advice and guidance documents specify their target audience, for example *homeowners and non-specialist buildings professionals,* or *for those involved in the assessment and management of land.* In other instances, the target audience is less clear and inferred through how the advice is categorised online, for example the web page *Generating Energy in Older Houses*, which is located in the subcategory *Owning an Older Home*, which in turn sits in the category of *Your Home*.

It is HE's intention to archive (effectively 'withdraw') a proportion of older, English Heritage-branded advice and guidance documents in December 2017. According to HE, decisions as to which documents to archive have been taken extremely carefully, although this may raise questions from users who search for a particular title and are no longer able to find it. It is understood that HE will continue to make archived documents available on a 'request basis' for the foreseeable future.

2.2 User expectations

Individuals interviewed for the research were asked what their expectations are of HE's advice and guidance and what 'good' looks like to them. The main messages are that HE's advice should be informed, well written, authoritative, comprehensive, reliable and useable.

Several local authorities mentioned that they look for detailed advice that they can apply in specific circumstances, that is not overly prescriptive, offers clarity, is written concisely and uses plain English. A private sector consultant said that they expect HE's advice and guidance to provide them with a good overview and starting point, but would not expect it to contain detailed technical advice. A contractor made the point that HE's advice should be as robust as possible and have the backing of industry.

2.3 Overall quality

With content ranging from information for homeowners, to detailed technical advice for heritage professionals, users generally praise the broad spread and wide audience-reach of Historic England's (HE) advice and guidance.

For the most part, the content is considered authoritative, well researched, well written and trustworthy. Several interviewees compliment HE's advice for generally meeting their expectations and consider HE to be their 'go to' resource. A member of the public referred to HE's advice as *"the only complete resource for listed buildings",* while a consultant made the point that HE's advice and guidance covers topics they are unable to find elsewhere, and that when quoting from these sources they have never been challenged.

Almost all interviewed users feel that HE's advice and guidance supports existing policies and standards in the historic environment sector extremely well. A small amount of criticism here centres on the issue that some advice and guidance can be difficult to interpret and

longwinded, making it hard know what types of interventions HE would and would not approve of. However, documents that one user finds easy to interpret can be considered straightforward to another user. Further perceptions on 'least useful' topics are explored in section 2.4, with a discussion around the level of detail (including 'complexity') covered in section 2.5.

"There used to be some conflicts, but since the introduction of the NPPF, Historic England has become much more fully in-tune with policy."

Local authority planning officer

On a scale from 1 'strongly disagree' to 10 'strongly agree', surveyed users of HE advice and guidance were asked to rate six specific aspects of the content (Figure1).

Average ratings are generally favourable, rounding to 8 out of 10 in relation to each aspect. HE has emerged strongest in relation to advice and guidance being accurate and well informed, and comparatively weak in relation to the content being up-to-date, impartial and objective.

Figure 1 Approval ratings for specific aspects of HE advice and guidance
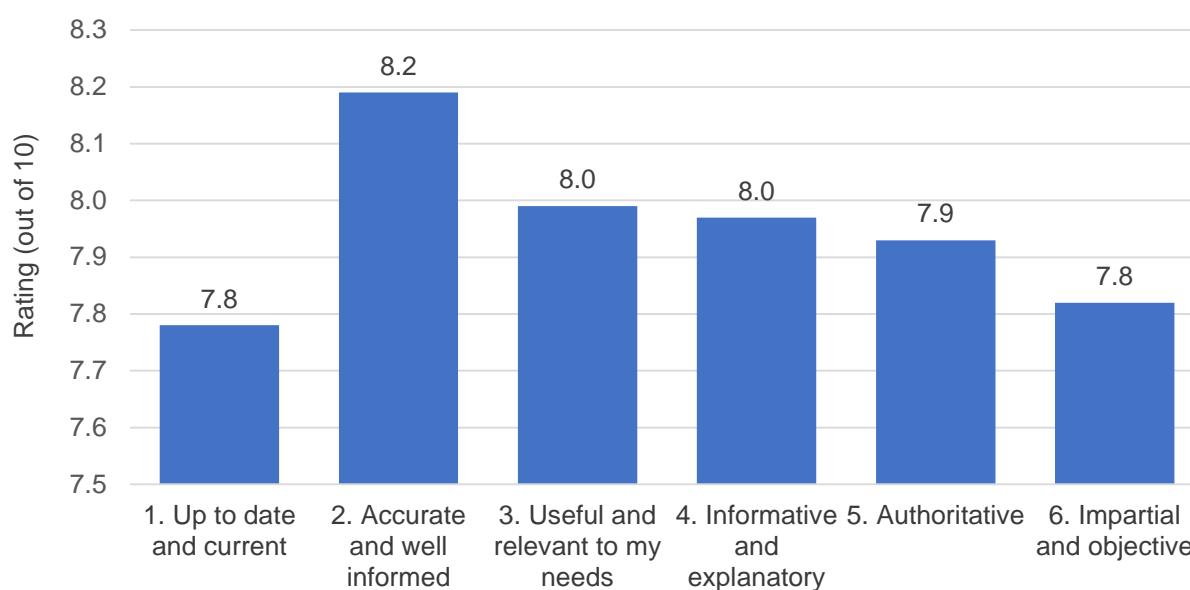
Base range: 349 to 355 respondents

There are some observable differences by specialism, with archaeologists generally more favourable than buildings/conservation specialists and planning specialists, respectively. (Figure 2).

Figure 2 Approval ratings (by specialism)

Figure 2 Approval ratings (by specialism)

Base range: 349 to 355 respondents

● Planning Specialists ● Archaeology Specialists ● Buildings/Conservation Specialists
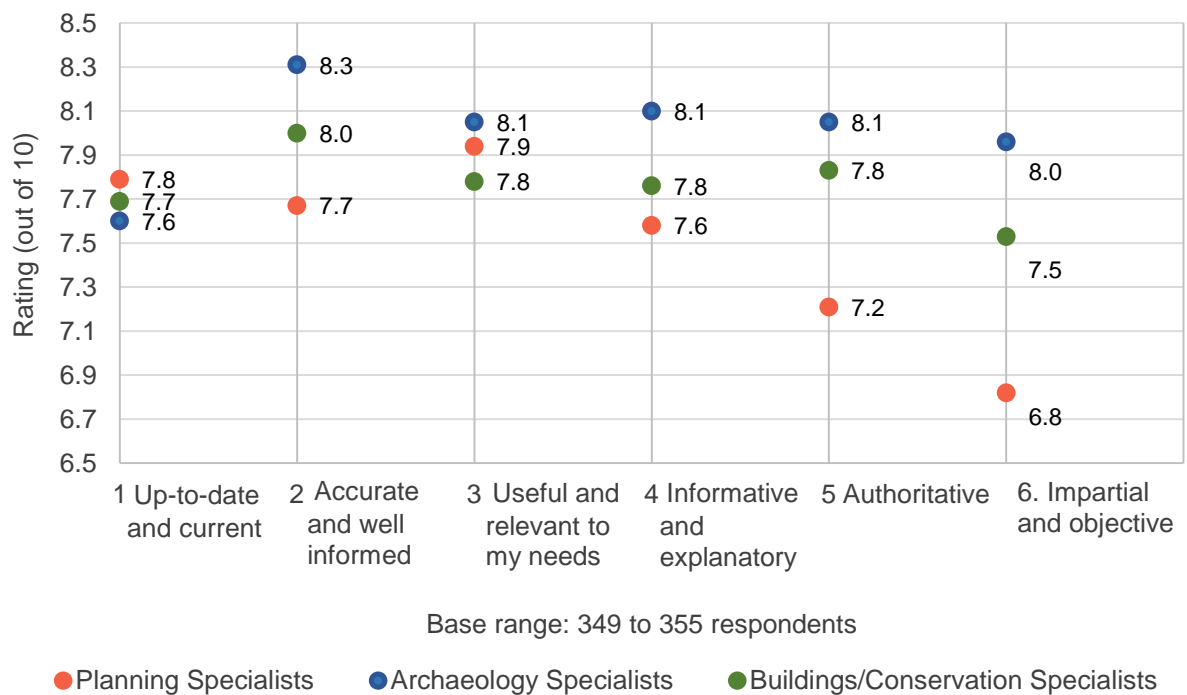
Table 1 presents a breakdown of the total number of respondents providing each rating (from 1 to 10) for each specific aspect of HE advice and guidance.

Table 1 Approval ratings (breakdown of total responses per rating)

Rating	1.Up to date and current		2.Accurate and well informed		3.Useful and relevant to my needs		4.Informative and explanatory		5.Authoritative		6.Impartial and objective	
	Total responses											
	Vol.	%	Vol.	%	Vol.	%	Vol.	%	Vol.	%	Vol.	%
1	0	0.0%	2	0.6%	2	0.6%	0	0.0%	1	0.3%	0	0.0%
2	3	0.9%	2	0.6%	1	0.3%	4	1.1%	6	1.7%	7	2.0%
3	5	1.4%	4	1.1%	8	2.3%	6	1.7%	5	1.4%	8	2.3%
4	3	0.9%	5	1.4%	5	1.4%	5	1.4%	10	2.9%	8	2.3%
5	31	8.8%	15	4.3%	22	6.2%	11	3.1%	22	6.3%	37	10.6%
6	21	6.0%	13	3.7%	20	5.6%	19	5.4%	21	6.0%	33	9.5%
7	67	19.0%	49	14.0%	64	18.0%	68	19.4%	39	11.2%	53	15.2%
8	144	40.9%	117	33.3%	108	30.4%	126	35.9%	105	30.1%	92	26.4%
9	42	11.9%	87	24.8%	68	19.2%	69	19.7%	84	24.1%	65	18.6%
10	36	10.2%	57	16.2%	57	16.1%	43	12.3%	56	16.0%	46	13.2%
Total	352	100%	351	100%	355	100%	351	100%	349	100%	349	100%

"Some of the guidance talks quite generically about a very specific area of the discipline (e.g. methods and techniques)… More advanced reading lists would also be useful."

Local authority archaeologist

2.4 Most and least useful topics

Table 2 shows the most downloaded advice and guidance documents from HE's website over the first nine months of the 2016-17 financial year. Documents with very few downloads tend to be older and/or cover very niche topics, e.g. *Identifying and Protecting Palaeolithic Remains.*

Table 2 Most-downloaded HE advice and guidance documents (Google Analytics)

Title	Download ranking	Total downloads (Apr-Dec 2016)
Understanding Historic Buildings	1	4,546
Conservation Principles, Policies & Guidance	2	3,745
Setting of Heritage Assets	3	2,820
Conservation Area Designation, Appraisal and Management	4	2,782
Guidance on de-listing a building	5	2,624
Managing Significance in Decision-Taking in the Historic Environment	6	2,099
Stopping the Rot	7	1,984
Insulating Solid Walls	8	1,933
Preserving Archaeological Remains	9	1,850
Making Changes to Heritage Assets	10	1,660
Energy Efficiency and Historic Buildings	11	1,626
Traditional Windows: their care, repair and upgrading	12	1,414

Survey respondents were asked to name up to five advice and guidance documents they have personally found most useful. A total of 865 were mentioned (average of two per respondent) and a wide variety of responses were given. The most popular results broadly align with Table 2, indicating that the most downloaded documents are generally considered the most useful[5].

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[5] Survey respondents did not always list advice and guidance titles by their full titles, making it difficult to fully quantify the list of most and least useful sources.

Respondents were also asked to name up to five documents they have found least useful. A total of 206 were mentioned (average of 0.5 per respondent) and the three most commonly mentioned, with reasons, are set out in Table 3.

Table 3 Least useful advice and guidance documents (Survey)

Title	No. respondents mentioning this title	Main reasons given
Listed Buildings and Curtilage	16	Concerns raised about how curtilage listed buildings were defined in past advice and guidance, and the appropriateness of the examples given (NB: These views appear to relate to an edition of the guidance which has since been withdrawn and HE points out that the advice is about new definitions, which are evolving as cases are decided).
Setting of Heritage Assets	9	View that no matter how much a development proposal affects the setting of a designated heritage asset, its overall heritage significance will remain unchanged. Perception that the guidance uses a complex approach to decision-taking which is challenging to grasp and time-consuming to employ.
Conservation Principles, Policies & Guidance	5	View that the guidance is written in a complex way, is incompatible with heritage protection legislation and that there needs to be a better appreciation of townscape, especially in determining the character and special interest of conservation areas.

A minority of stakeholders interviewed for the research mentioned having found occasional inaccuracies in HE's content, and instances where they feel the author might not have possessed fully up-to-date knowledge on a particular subject. This is partly attributed to the pace of fieldwork and the challenge of keeping on top of new discoveries. The survey also reveals the second most common barrier for users of HE's advice and guidance is encountering outdated content (Figure 15, section 4.4).

It is suggested by several survey respondents, interviewees and workshop participants that a more collaborative approach to producing advice and guidance could help to tackle this challenge and strengthen the value of advice and guidance (discussed further in section 5.4).

2.5 Level of detail

Three quarters of survey respondents (75%) consider the level of detail in HE advice and guidance to be 'about right', with the remainder having encountered some issues, be it in terms of content being too simple and/or too complex (Figure 3).

The pattern is similar across most user groups, although an above-average 13% of building owners and managers consider the level of detail to be 'too complex', compared to 1% overall.

Figure 3 Level of detail in HE advice and guidance

Base: 365 respondents
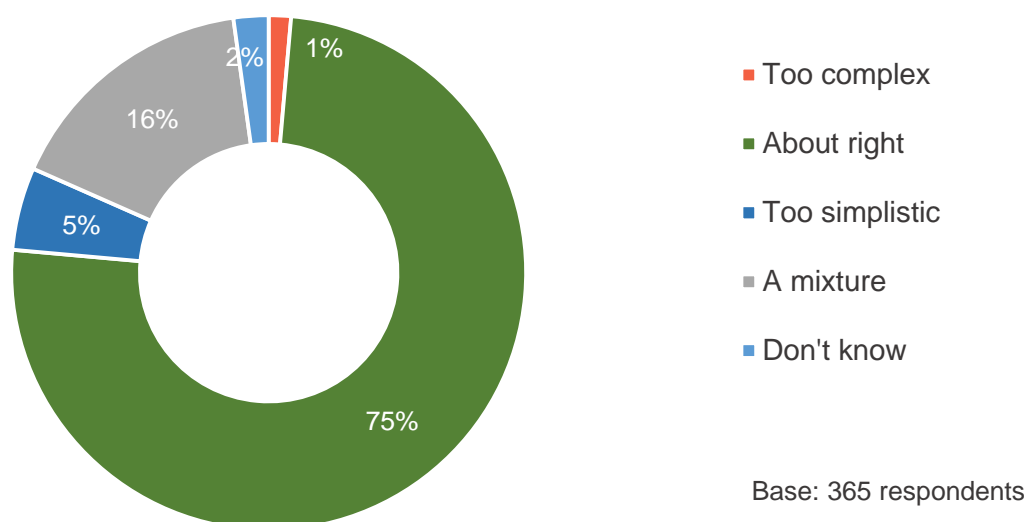
Given that each user's experience and expertise can vary considerably when arriving at an advice and guidance document, workshop participants generally acknowledged that HE has a difficult balance to strike in setting the level of complexity. As an example, one historic environment professional in an arm's length body described the guidance on moats as "incredibly simplistic" and the guidance on the mitigation of wetland sites as "highly technical and complex". This could be put down to one of two things: either a genuine inconsistency in the way the two documents are written; or that each document is written with a different audience in mind, which may not be entirely clear at the start of the document.

The minority of users describing the advice as 'too simplistic' tend to find it too high-level, lacking a clear sense of purpose, vague and "woolly", with insufficient detail in some cases for professionals. This appears to be a particular issue for local authority planning officers when having to take on work previously carried out by conservation officers, i.e. following local authority cutbacks. As an example, while guidance intended to encapsulate all buildings is considered useful, this could arguably benefit from additional detail on each of the main building types, as well as more relevant examples and explanations.

Several respondents consider the guidance on Setting to be confusingly written, particularly the new five-step approach, and that the concept of a 'setting' needs to be treated with some elasticity, which may not be fully appreciated by lay users.

"The Settings guidance does not include a specific methodology for how to assess the contribution that setting makes to the significance of a heritage asset or the impact of any subsequent development. This means the methodology routinely used by consultants is that from the Design Manual for Roads and Bridges, which is not appropriate for most developments."

Local authority built environment/conservation officer

Other views include guidance being perceived as overly complex, or that it does not always 'get to the point' quickly enough to enable practitioners to take decisions and provide clear, onward justifications to third parties, which may include non-experts. A minority made the point that guidance aimed at the general public and used more frequently – such as Traditional Windows –can seem over-long and not sufficiently easy to read.

"Some guidance, such as Conservation Principles, is convoluted and appears incompatible with heritage protection legislation. Consequently, it is not used by many local authorities, consultancies and built environment professionals."

Planning consultant

Additionally, a small number of respondents mentioned instances of guidance feeling out of date in relation to policy, technology or best practice. Suggestions for improvement here include reflecting advances in scientific archaeology, dating techniques and electronic recording, and taking account of advanced 'slim glazing' or sound proofing techniques which it is felt could be reasonably applied to listed buildings and more clearly reflected in the guidance.

To help practitioners and building owners, it is suggested that there should be more examples of how HE advice and guidance could be applied in common 'real life' situations, as opposed to signature sites such as the Tower of London (referenced in several places in *Seeing the History in the View* – a 2011 document. Several respondents and workshop participants referred to Historic Environment Scotland's advice as exemplars of good practice in terms of its succinctness and being well tailored to its target audience.

2.6 New/additional topics

Survey respondents were asked whether they think HE needs to introduce new advice and guidance that is not already covered. More than a third (36%) said yes (Figure 4) and the

proportion doing so is highest among buildings/conservation specialists (46%) and local authority respondents generally (42%).

Based on insights from the interviews, the high proportion of respondents stating 'don't know' seems to be at least partly due to not knowing the full breadth of available content in sufficient detail, coupled with difficulties searching for and finding what they need (explored more in section 3.4).

Figure 4 Whether new HE advice and guidance is needed
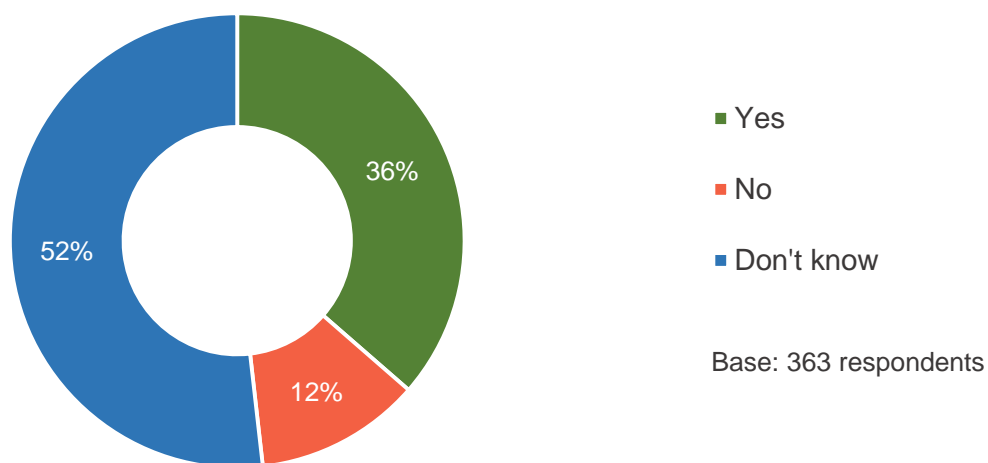
Respondents saying 'yes'' were asked what additional topics should be included, with a full list presented in Appendix 2

3. Structure and Style

3.1 Main features

HE's individual advice and guidance documents are generally structured using a nested arrangement of headings/sub-headings, and a several sampled sources include section summaries and 'key points'. A contents page appears to be standard practice for PDF documents (with the exception of the shortest entries), but less so for web pages, especially older pages. PDFs make varying use of text, bullet points, figures, tables, maps and photographs.

The advice and guidance often contains hyperlinks to other sources, enabling users to find more information to meet their needs. Some documents include a full bibliography, while others point users directly to additional relevant publications or include lists of 'next steps', as appropriate.

In terms of length, web articles typically range from between 800 and 3,000 words. PDF documents vary in length from between one page to 98 pages (26,000 words), with most between 30 and 60 pages long. The year of publication (including year of re-issue, if appropriate) appears to be consistently present in PDFs, often on the back page. However on web pages, the date of the last update is not available and is an example of good practice used by others, for example Gov.UK. The addition of a 'last updated' stamp at the top of the web page is therefore an addition that HE may wish to apply when making future updates.

3.2 General user perceptions

Most users interviewed for the research consider HE's individual advice and guidance documents to be easy to digest in terms of length, document structure and language. Users are generally complimentary about the thought that goes into presenting information in a variety of ways that makes it easy to read and interpret. The general HE 'house style' therefore appears to be well received.

Local societies are generally pleased with the Listing Selection Guides, while contractors and consultants mentioned the case studies for helping to illustrate topics and the use of bullet point lists which make digesting the content easier.

"We value the fact the advice and guidance is independent, external and based on more information than is available within the local authority – so it carries a lot of weight."

Local authority built environment/conservation officer

3.3 Satisfaction ratings

Survey respondents were asked to rate their satisfaction with various specific aspects of the structure and style of HE's advice and guidance. The results are shown in Figure 5 and ratings are broadly comparable across different user groups and specialisms.

- **Highest levels of satisfaction** relate to clarity of language (80% very/fairly satisfied), usefulness of titles (77%) and balance of text, photos and other graphics (72%);

- **Lowest levels of satisfaction** generally relate to how content is indexed and organised, including the ability to cross-refer to other sources (36% very/fairly satisfied), navigability of the website (44%) and how guidance is organised on HE's website (49%).

Figure 5 Satisfaction with the structure and style of HE advice and guidance

Base: 357 respondents

Legend: Very satisfied · Fairly satisfied · Neither satisfied nor dissatisfied · Fairly dissatisfied · Very dissatisfied · Don't know
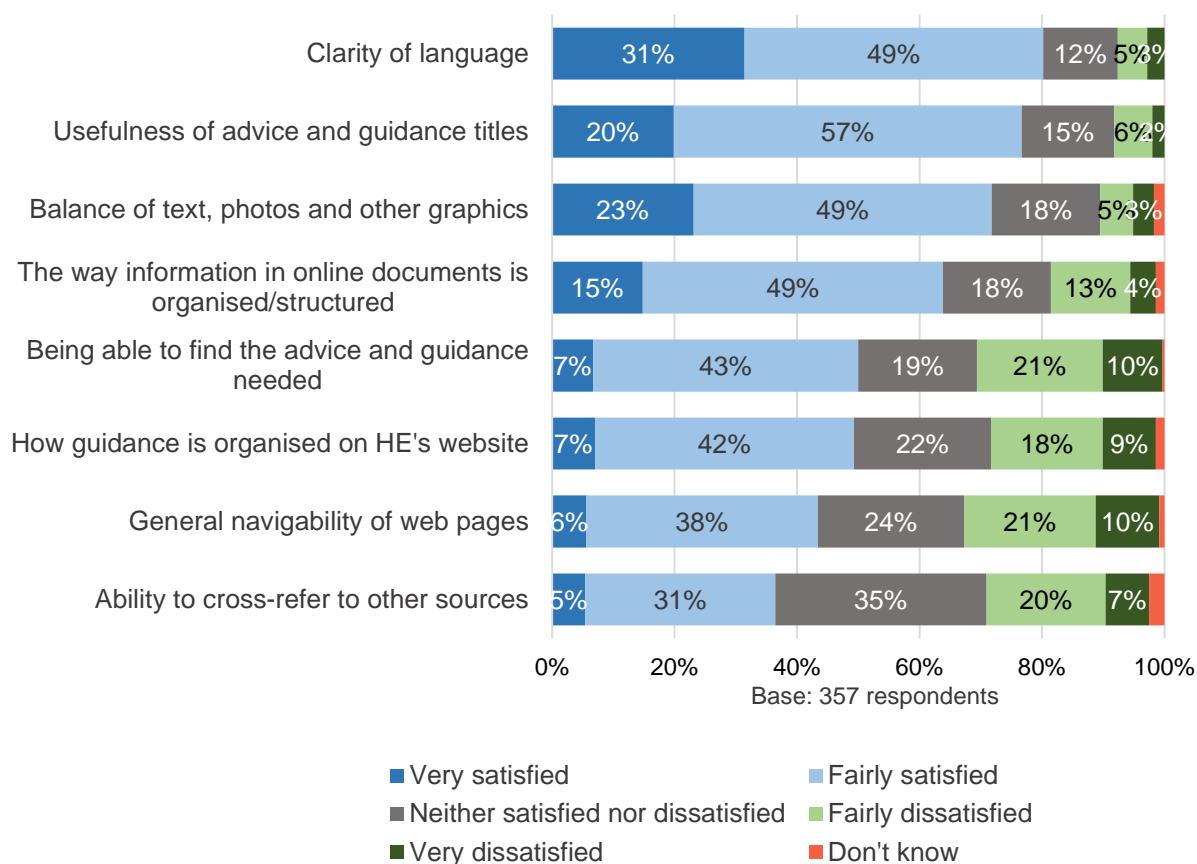
Survey respondents stating 'very/fairly dissatisfied' to at least one of the above statements were asked to describe the issues they have experienced. The vast majority of comments relate to difficulties finding advice and guidance on HE's website and the limitations of the website's search facility.

3.4 Website and search facility

"Navigating HE's website and finding specific items of advice and guidance is a nightmare."

<div align="right">Contractor/consultant</div>

The biggest issue raised by users interviewed following the survey is being unable to easily find the advice and guidance they need on HE's website.

- One workshop participant gave the example that if a user performs a search for a particular topic on HE's website, they might follow one route and reach a particular document, whereas if they use a search engine, they may be directed to a different (and possible more appropriate) document on the same site;

- Questions were raised about HE's practice of presenting new documents in the *Latest Advice and Guidance* section of the website. It does not seem clear to users if these documents can also be accessed via the main category where they would ordinarily expect to find it, e.g. *Your Home* or *Technical Guidance*. Where the latter is not the case, HE should consider ensuring documents can be found via the relevant categories on the website.

Historic England's advice and guidance web pages contain meta-descriptions and keywords in the source code, designed to help with search engine optimisation (SEO)[6]. When a test Google search was performed for the article *Flood Risk Advice* (using the full title), the item appeared tenth out of 14 entries on the first page of results. However, when a test search was performed by omitting one of those words or using other variations (e.g. by simply searching 'flood advice' or 'flood advice historic buildings') the article did not appear in at least the first three pages of search results. This suggests that difficulties faced by users in searching for HE advice and guidance is not limited to HE's website but can also be affected by low rankings within search engines.

There is also a sense of confusion among some users around the 'hierarchy' of HE advice and guidance, for example some are published as Good Practice Advice (GPA) and others as Historic England Advice Notes (HEANs). Without a clear explanation as to the purpose that each group serves, stakeholders are concerned that many users (especially lay people)

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[6] Search engine optimisation uses a variety of complex algorithms. Google has published a guide to this process, but this does not explain the "secrets" of how to improve ranking positions. The document is available at: http://static.googleusercontent.com/media/www.google.com/en//webmasters/docs/search-engine-optimization-starter-guide.pdf

will not know which they should consult first, nor which (if any) carry relatively more weight, which could help as part of an appeal case.

Other issues can generally be put down to individual user perceptions and preferences. For example, one interviewee would like to see more case studies, whereas another finds these less helpful. Similarly, while most say they find the advice and guidance to be clearly written, a small number of others believe there should be less jargon.

4. Use of HE Advice and Guidance in Practice

4.1 Reasons for use

Individuals responding to the survey use HE advice and guidance for a range of purposes (set out in Figure 6). The most common answer is improving own knowledge and awareness, followed by assessing the significance of heritage assets and researching heritage assets.

This pattern is very similar across most respondent groups, although the top answer among planning specialists and archaeology specialists is: 'as part of planning-related activities or development-led investigations' (accounting for 16% of responses in each group).

Figure 6 Purpose of using HE advice and guidance

Purpose	%
Improving own knowledge and awareness	14%
Assessing the significance of heritage assets	12%
Researching heritage assets	12%
As part of planning/development-led activities	11%
Writing a report	9%
Working on conservation management plans	7%
Carrying out repairs to buildings/parks/gardens	6%
Developing local authority plans and strategies	6%
Planning a project	5%
Making alterations to buildings, parks or gardens	5%
Preparing funding/grantapplications	4%
Undertaking education or outreach activities	3%
Finding out who to contact	3%
To aid partnership and collaborative working	2%
Finding out if planning/other permissions needed	2%
Other	1%

Base: 1,830 responses

Local authorities interviewed following the survey use HE advice and guidance to help inform and prepare planning briefs and reports, as well as to "add weight" to their own professional advice. They also use it to provide them with additional specialist knowledge where needed, to identify examples of good practice, and as a point of reference when helping members of the public.

Contractors report using HE's advice and guidance to identify good practice approaches in specialist areas and to plug gaps in knowledge. Societies mentioned using the *Listing Selection Guides,* for example to identify whether any features may be put at risk from development or to contribute to planning consultations.

Several users interviewed for the research made the point that HE is their first port of call for advice and guidance, although most also refer to other sources, such as those produced by the professional bodies, institutes and National Amenity Societies mentioned in the Acknowledgements section of this report. One stakeholder commented that the *Practical Building Conservation* book series is a well-respected resource but only accessible to those with the financial means to maintain a detailed technical library, therefore it's wealth of knowledge is arguably "outside the reach" of many individuals and organisations in the sector.

Just over half of surveyed users of HE advice and guidance (51%) say they search for topics that fall within and outside their main area of expertise (Figure 7).

Figure 7 Types of searches – familiar/unfamiliar topics

- A completely new topic to me
- A topic I have some familiarity with
- A topic that falls within my area of expertise
- It's hard to say - a mixture

Base: 364 respondents
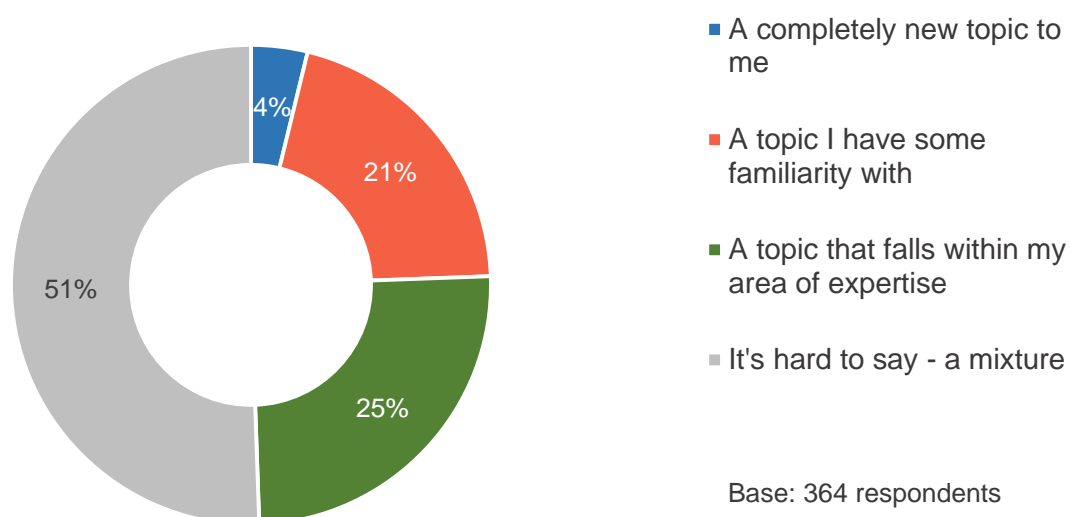
Societies and community groups appear more likely than others to use advice and guidance solely in relation to a new topic, while contractors, consultants and local authorities seem more likely to use advice and guidance that falls within their main area of expertise (Figure 8).

Figure 8 Types of searches – familiar/unfamiliar topics (by user group)

User group	A completely new topic to me	A topic I have some familiarity with	A topic within my area of expertise	Hard to say - a mixture
Societies & Community Groups	33%	40%	7%	20%
Universities & Colleges		33%		67%
Building Owners & Managers		33%	7%	59%
Others	3%	24%	25%	48%
Contractors & Consultants	3%	20%	33%	44%
Local Authorities	2%	15%	25%	58%

Base: 364 respondents

- A completely new topic to me
- A topic I have some familiarity with
- A topic within my area of expertise
- Hard to say - a mixture

Planning specialists seem more likely than archaeology and buildings/conservation specialists to go to HE advice and guidance on topics they have some, i.e. limited, familiarity with. This arguably supports a stakeholder view that planners are having to become increasingly familiar with conservation matters following cuts to dedicated conservation staff across English Councils (Figure 9).

Figure 9 Types of searches – familiar/unfamiliar topics (by specialism)

Specialism	A completely new topic to me	A topic I have some familiarity with	A topic within my area of expertise	Hard to say - a mixture
Planning Specialists	6%	26%	34%	34%
Archaeology Specialists		17%	21%	61%
Buildings/Conservation Specialists	3%	15%	32%	51%

Base: 254 respondents

- A completely new topic to me
- A topic I have some familiarity with
- A topic within my area of expertise
- Hard to say - a mixture

4.2 Access routes

Google Analytics data supplied by HE provides insight into how users arrive at its advice and guidance. Data for two popular sources are presented Table 4, below, including:

- The Latest Advice and Guidance web page; and
- Conservation Principles, Policies & Guidance.

The results reveal that the majority of users access these pages through an organic search engine such as Google or Bing, with only a minority referred from other web pages, including from elsewhere on Historic England's website. This supports the findings in chapter 3, suggesting that users who face problems being able to find what they need on HE's website are choosing to use a different search engine.

Table 4 Exemplar access routes (Google Analytics)

Latest Advice and Guidance		
Channel	**Volume**	**Percentage mix**
Organic search (e.g. Google, Bing)	5,371	69.2%
Direct (e.g. manually typed or bookmarked URL)	1,189	15.3%
Referral (i.e. from other websites)	622	8.0%
Social (Facebook or Twitter)	548	7.0%
Other, including affiliates and email links	30	0.5%
Conservation Principles, Policies & Guidance		
Channel	**Volume**	**Percentage mix**
Organic search (e.g. Google, Bing)	2,920	75.5%
Direct (e.g. manually typed or bookmarked URL)	302	7.8%
Referral (i.e. from other websites)	634	16.4%
Social (Facebook or Twitter)	12	0.3%
Other, including affiliates and email links	0	0.0%

Date range: 1st April 2017 to 22nd October 2017.

Interestingly the survey paints a slightly different picture, with the most commonly mentioned channel for accessing HE advice and guidance being HE's website (36%) followed by using a search engine (22%) and by referring to previously downloaded and printed material (15%) – Figure 10. This difference could be down to the survey audience being more directly engaged with, and knowledgeable about, HE's advice and guidance and therefore more likely to know where to look.

User groups most actively visiting HE's website to find advice and guidance, include planning specialists (47%), building owners and managers (46%) and

contractors/consultants (41%). University and college-based users are comparatively more likely than other groups to use a search engine (33%).

Figure 10 How advice and guidance is found

Base: 828 responses (multi-response)
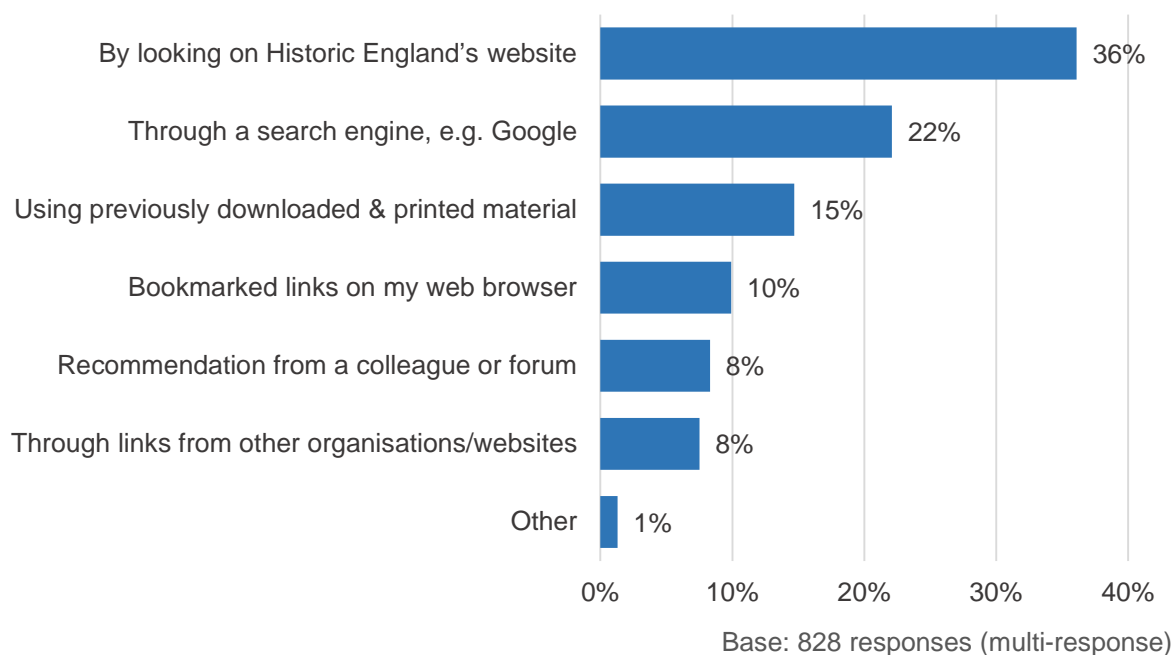
Two thirds of respondents (66%) say they refer to advice and guidance both on-screen and in printed format depending on the situation at hand. This indicates that users are less inclined to have one particular preference and that content formatted in a print-friendly way is important to users (Figure 11).

This pattern is similar across the different respondent groups, although surveyed building owners and managers are comparatively more favourable towards printing the information they need (33%).

Figure 11 On-screen and/or printed use

- On screen
- Printing information off
- It depends – a mix of both
- Don't know

1%
20%
13%
66%

Base: 366 respondents
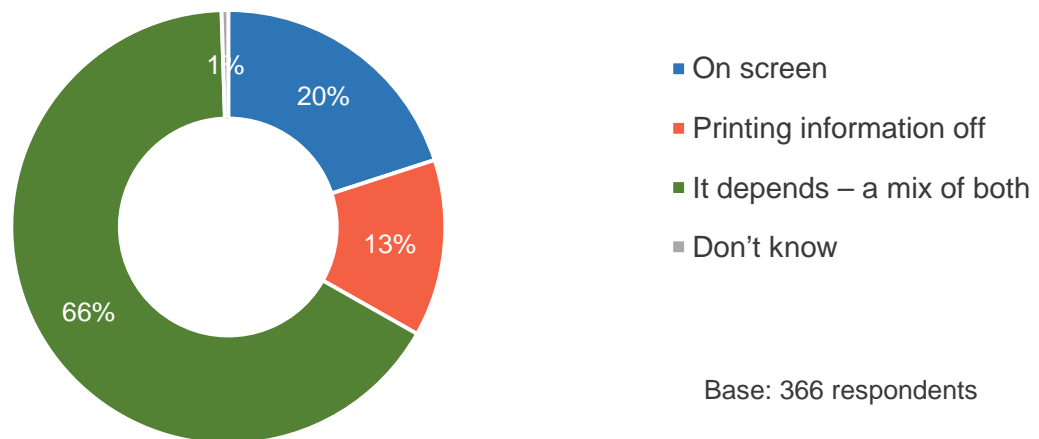
Local authorities interviewed following the survey refer to HE advice and guidance in a variety of ways. Some read the information in detail, especially new releases and/or if it will inform planning briefs or reports. In other cases, the material is often skimmed or scanned, with keyword searches performed (via Control +F).

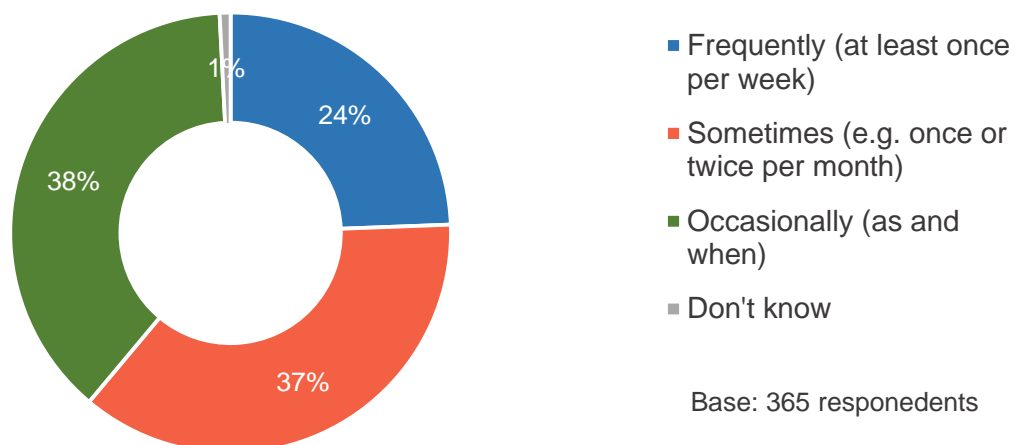For documents used on regular basis, local authorities tend to know the content in some detail so are confident where to look to find what they need. Contractors and consultants appear more inclined to skim the documents, using keyword search or advanced Google searches; while local societies take a mixed approach depending on the advice and guidance in question and the purpose for which they wish to use it.

4.3 Frequency of use

HE's online advice and guidance is used with varying degrees of frequency, as can be seen from Figure 12.

Figure 12 Frequency of use

- Frequently (at least once per week)
- Sometimes (e.g. once or twice per month)
- Occasionally (as and when)
- Don't know

1%
24%
38%
37%

Base: 365 responedents

There are observable differences here by respondent group, with the most frequent users being local authorities, contractors and consultants, and the most infrequent users being building owners and managers, universities and colleges, and 'others' (Figure 13).

Figure 13 Frequency of use (by user group)

Base: 365 respondents

- Frequently (at least once per week)
- Sometimes (e.g. once or twice per month)
- Occasionally (as and when)
- Don't know
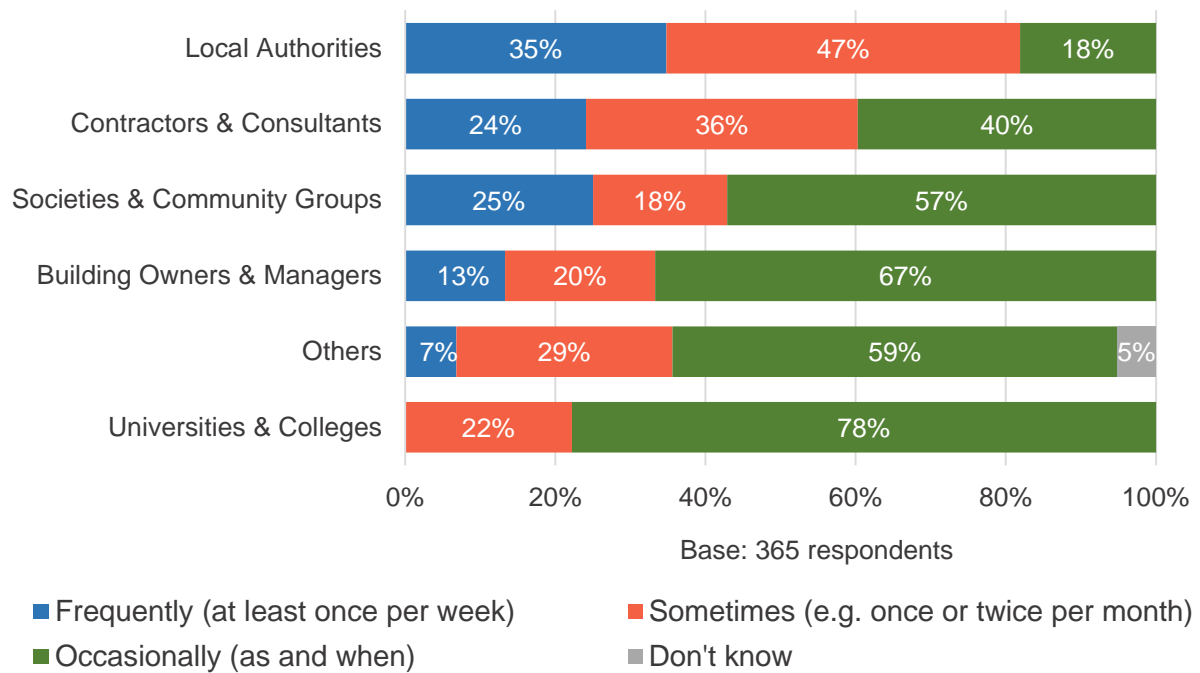
Surveyed buildings/conservation specialists are revealed to be more regular users than archaeology and planning specialists, respectively (Figure 14).

Figure 14 Frequency of use (by specialism)

Base: 254 respondents

- Frequently (at least once per week)
- Sometimes (e.g. once or twice per month)
- Occasionally (as and when)
- Don't know
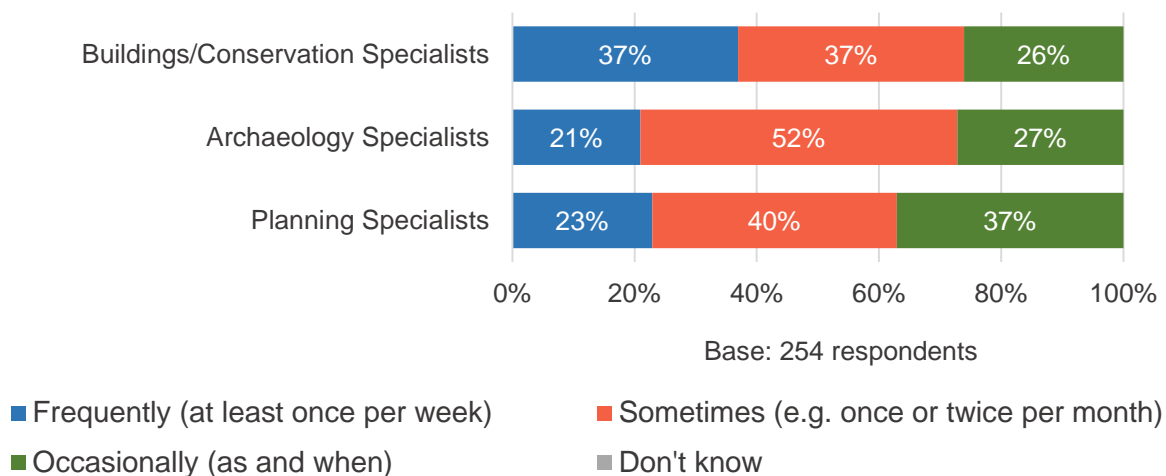
4.4 Barriers encountered

More than half (59%) of surveyed users of HE advice and guidance confirmed that they have experienced one or more barriers to doing so. These are summarised in Figure 15, with the most common barrier being unable to find the guidance they need (accounting for 26% of responses). This list reflects a number of the issues discussed in detail in chapters 2 and 3, particularly difficulties with being able to find information on the website and the fact certain guidance does not always seem to reflect latest trends and technological developments, such as the latest scientific approaches to archaeology.

Figure 15 Barriers to using HE advice and guidance (users)
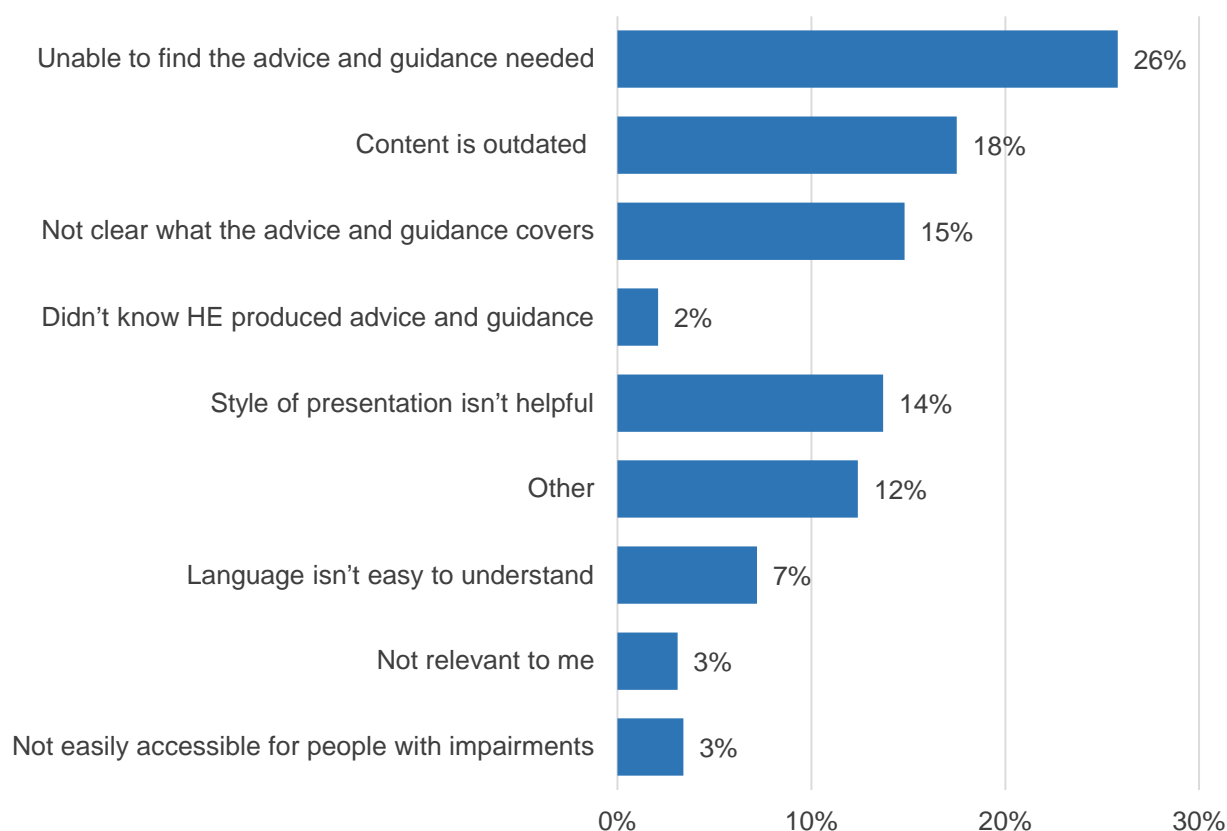
Base: 345 responses (multi-response question)

A total of 53 non-users of HE advice and guidance also answered this question, with the most common answer being that they did not know HE produced advice and guidance (72% of responses) followed by the advice and guidance not being perceived as relevant to them (15%).

4.5 Advocacy
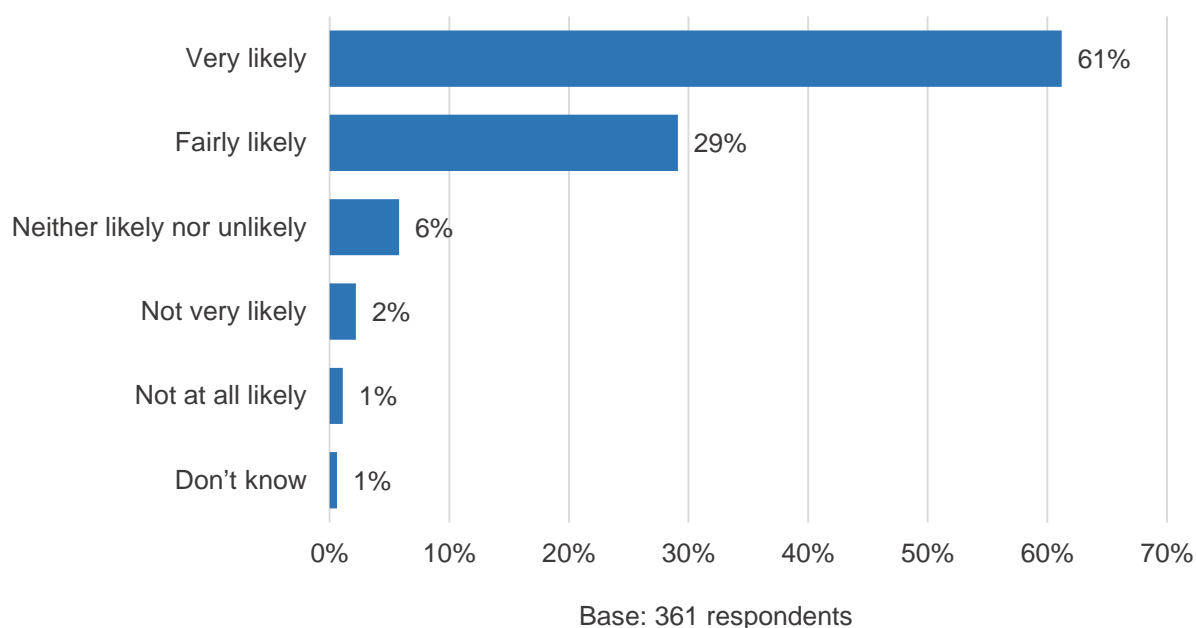
On the whole, the vast majority of survey respondents (90%) are very/fairly likely to recommend Historic England's advice and guidance to a friend or colleague, with similar responses across the different user groups and specialisms (Figure 16).

Figure 16 Likelihood of recommending HE advice and guidance to others

Base: 361 respondents

4.6 Additional considerations

More than three quarters of survey respondents (77%) would be interested in registering for updates if such a feature were to be made available.

The level of interest is highest among local authorities (87%) and contractors/consultants (83%) and lowest among universities/colleges (27%). It is generally supported by workshop participants.

The vast majortiy of respondents (95%) would like to receive updates in the form of an email bulletin (as opposed to another online mechanism), while there are mixed preferences concerning what, precisely, they would like the updates to contain (Figure 17).

Figure 17 What to include in e-updates about advice and guidance

- All guidance updates
- Particular guidance documents, webpages or subject areas
- When consultations on draft guidance documents are launched

Base: 506 respondents
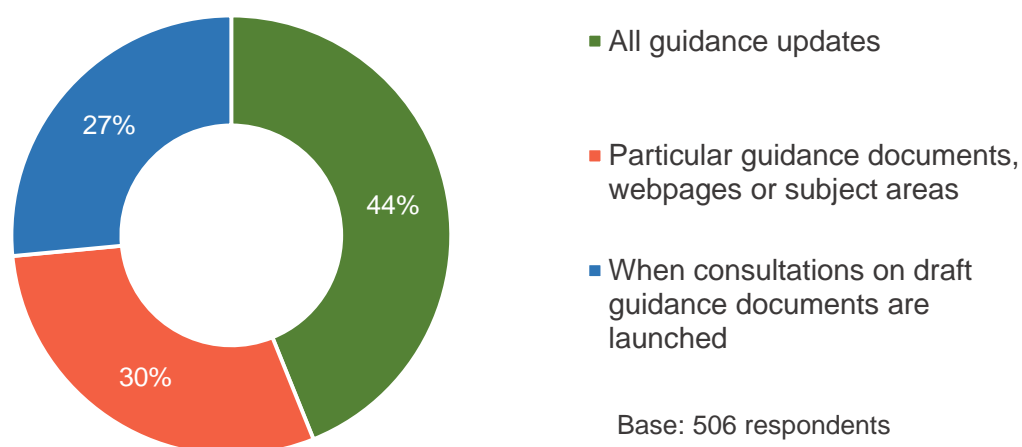
Surveyed users of HE advice and guidance were asked if they would find it helpful to have access to a series of structured online training programmes to improve their awareness and knowledge. Almost three quarters (74%) believe they would find this useful (although universities/colleges are more ambivalent, with 27% saying 'don't know') – Figure 18.

Figure 18 Potential usefulness of a structured online training programme

Base: 361 respondents
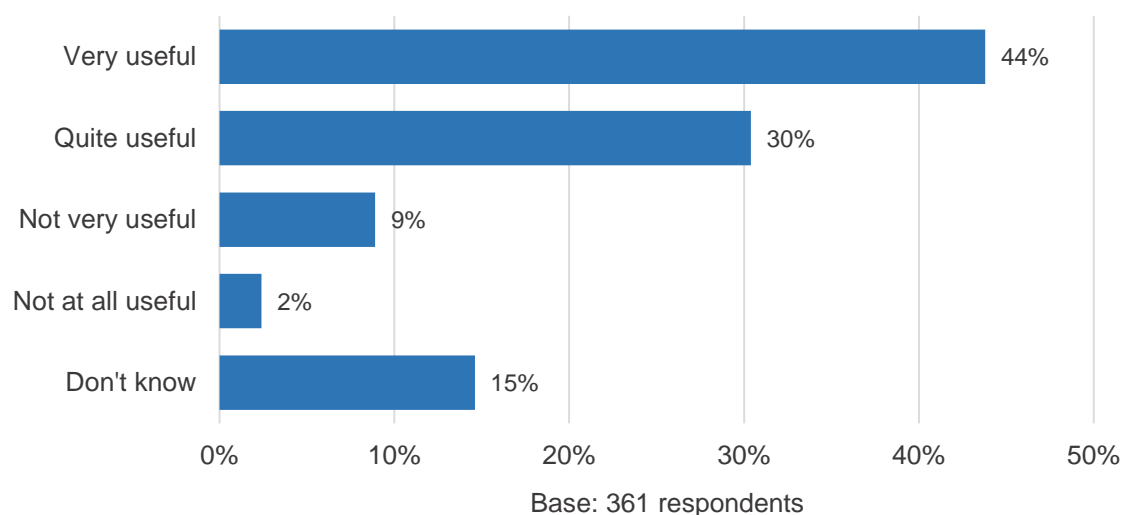
Those saying that they would find a training approach useful, were also asked what types of delivery options or platforms should be considered. The results indicate that a variety of solutions could have merit, with the most popular being online learning modules/tutorials (Figure 19).

Figure 19 Delivery platforms for a possible online training programme

Base: 832 responses (multi-response)

5. Conclusions

On the whole, HE's advice and guidance is well received and trusted by users with a strong level of advocacy (90% would speak highly about it to others). Users generally praise the breadth of content, which is accessed by a wide variety of audiences and for a variety of reasons, from technical professionals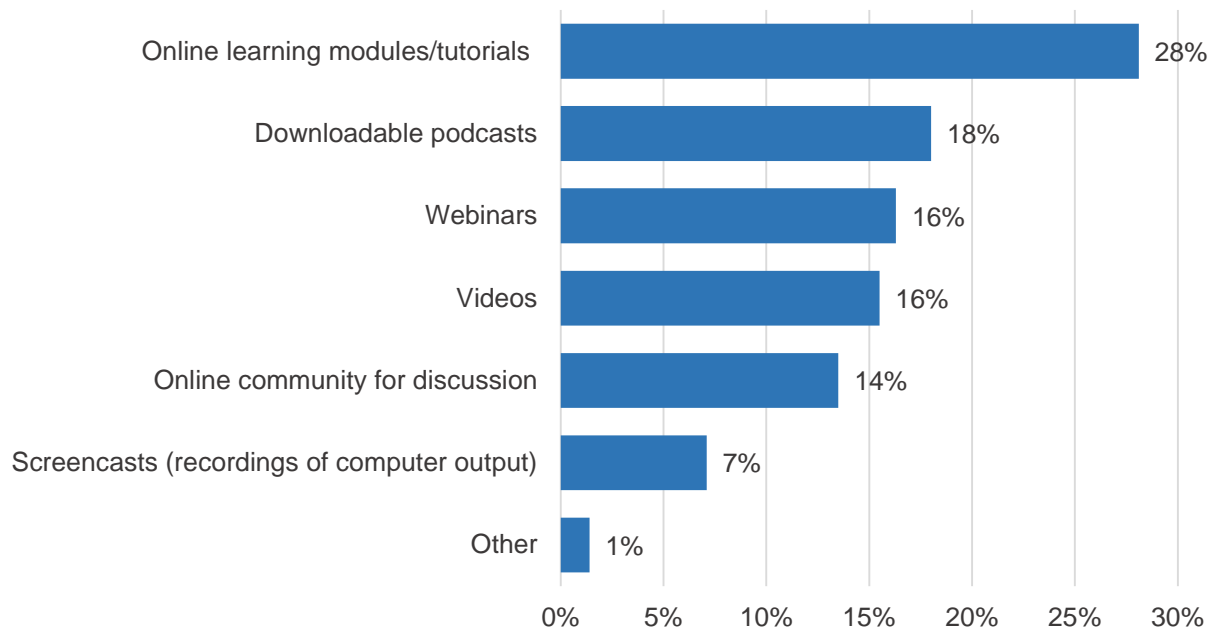 to lay users, and from local authorities to building owners and societies. Local authorities and contractors are the most frequent users and value the advice and guidance in support of planning and development-led activities, but other users make a point of accessing the guidance on a more ad hoc basis.

It is important that HE clearly writes for, and is considered accessible to, its different audiences, who bring varying perspectives and levels of prior knowledge. For the most part, the level of detail is considered appropriate, although a key issue is that documents do not always make their purpose and target audience clear. This could be one reason why minorities of users consider the advice to be too simplistic or too complex and could be mitigated by tailoring the content and writing for the intended audience.

The breadth of coverage means that there are no major concerns about gaps in content although users have put forward a range of suggestions for new and additional content when prompted. Other organisations in the historic environment generally seek to complement rather than duplicate HE's offer and there are no major concerns about duplication of content. That said, the sheer volume of available advice and guidance from a range of organisations can make it difficult for users (especially less experienced lay users) to know which to go to first. A such there is a case for greater collaboration to minimise the risk of duplication, strengthen content and improve cross-promotion.

By far, the biggest issue concerning HE's advice and guidance is that individuals are unable to easily find what they need, which largely seems to be due to the way web pages and documents are categorised online. The hierarchy of different groups of advice and guidance is not obvious and the search facility on the *Advice* section of HE's website could evidently be more effective at returning the results that users would expect to see. This is likely to be one reason why the majority of users seem to be performing organic searches, such as via Google. For non-users, the main barrier to accessing HE's advice and guidance is not being aware that HE produced it. This further emphasises the need for more collaborative approaches to promote advice and guidance and maximise reach to different audience groups.

6. Shaping the Future

This chapter sets out proposed future changes and improvements that Historic England should consider making to the online accessibility, content and development/review process for its advice and guidance.

6.1 Improving access, website navigability and indexing

There is a need for HE to improve how advice and guidance is organised and made available to users online, to improve the ease and speed of access.

Firstly, this should involve developing a clearer hierarchy of advice and guidance so that users understand the relative importance and weight of specific documents. Secondly, there could be a clearer and searchable index of existing, new and forthcoming content. Thirdly, the website search tool should be improved to make this more intuitive and effective in returning accurate results where users may not know the full and exact title.

Beta-testing of a newly organised advice and guidance web portal would arguably help to ensure that approaches taken to indexing and categorising content align more closely with user needs.

HE should also consider improving how *Latest Advice and Guidance* is presented, for example by using this page purely as an index but hosting the new content in those categories where users would instinctively expect to find it, i.e. to avoid it being missed.

As a more innovative option, HE should consider developing an advice and guidance App, optimised for mobile and tablet use, allowing users to search for and quickly access advice and guidance they need, whenever they might need it. A number of workshop participants support hard copy documents continuing to be available on demand, perhaps by maintaining this on a fee-basis, for those who would find that most useful.

6.2 Better tailoring of content for different audiences

HE should focus on making the purpose and target audience of its advice and guidance clearer, to increase engagement of users (and current non-users) through more relevant content.

The sheer volume of advice and guidance available from HE's website – especially when viewed alongside material available from other organisations – risks being confusing for those users who might not know where to start, especially historic building owners and managers.

A common perception is that HE advice and guidance follows a 'one size fits all' approach and HE should consider being clearer in its messaging concerning the purpose of each piece of advice and guidance and who it is aimed at. During the research, the example was given of planning-related advice, which is arguably directed at professionals and members of the public but using concepts and vocabulary that might not be helpful for a property owner.

Better tailoring of HE's advice and guidance could therefore involve:

- Clearer communication about the hierarchy of different groups of advice and guidance so that users can understand what that means in practice, how their purposes differ and how much weight they can expect to apply to each type;

- Clearer thinking about the purpose and target audience of each piece of advice and guidance, including what that mean for the level of detail and complexity of the writing); and

- Stating the purpose and target audience(s) at the start of each piece of advice and guidance

These approaches would help to better inform each audience segment, in particular by:

- Engaging current non-users/lay users/building owners with HE's advice and guidance; and

- Enabling these audiences to grasp why HE's advice is important and the potential unintended consequences of not following that through.

There is also a call for HE to be more bold, clear and direct in its advice and guidance, making clear to users what decisions it would endorse and helping building owners in particular to think about key considerations when looking for and seeking to appoint a contractor, i.e. to help them make informed choices.

6.3 Stronger internal coordination

HE should work to ensure that its own staff involved in producing advice and guidance take a strategic and joined-up approach to responding to priority advice needs in a consistent way.

This should involve thinking strategically about what new advice is needed; who it needs to be aimed at; who is best placed to write it; how enforceable it will be (if appropriate); and to ensure consistency is achieved in the approach and writing style.

One approach to doing so could involve using 'product owners' to write the advice and guidance, which is then passed through a marketing and communications team who have a

series of 'persona guidelines' in place when adapting the written style for the target audience. In the *2014-2016 Strategic Business Plan*, the Construction Industry Training Board (CITB) describes how it has developed a series of personas to reflect the broad spectrum of its customers and has taken these forward for its website[7].

6.4 Drawing on other examples of good practice

HE should consider how advice and guidance is successfully produced, disseminated and promoted by other organisations in the sector, to explore ways of further strengthening its on content and to reach a wider audience.

This also ties in with section 6.5 – Increasing collaboration across the sector.

HE could usefully take account of examples of good practice from other historic environment organisations that produce advice and guidance for their members and/or a wider audience, such as professional bodies, institutes and National Amenity Societies, as well as Historic Environment Scotland and CADW.

The drivers for other historic environment organisations to produce advice and guidance include changes in legislation, their own work which identifies gaps in available advice, other topical issues arising through their work, or as a result of what their members/customers say they need. Some take a formal approach to deciding what's needed, for example by using consultations, member surveys and/or discussions at internal committee meetings. Others develop their offer more organically through member or public interactions such as workshops and following telephone/email queries they receive.

Observed strengths from the sampled sources produced by other organisations are not dissimilar to Historic England's advice and guidance. They include:

- Use of clear sections and sub-sections;
- Bullet points to break up long passages of text;
- Checklists;
- Glossaries;
- Notes in the margins of document, i.e. to bring out pertinent facts;
- Infographics and illustrations, including diagrams, tables, photographs and maps;
- Footnotes and/or bibliographies; and
- Signposting (with or without links) to other organisations and resources; and
- Date stamps to show when a web page was last updated, in some cases including a summary of 'main updates' so a user can see what has changed

Several say they always write with the target audience in mind, requiring a 'customer focused' rather than 'product focused' approach to better capture and respond to the needs

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[7] CITB (2014) *Strategic Business Plan 2016-2016* (page 14)

and priorities of particular user groups. Examples of delivery channels which have proved effective, include:

- **Web pages and electronic PDFs** – the most popular publication format due to being relatively easy to produce and categorise, as well being optimisable for mobile and tablet devices;

- **Hard copy publications** – their prevalence seems to be reducing due to cost and the risk of documents becoming dated, with some instances of hard copy titles available only on a request or fee-paying basis;

- **E-newsletters** –especially useful for segmenting audience groups and signposting recipients to the release of new advice and guidance;

- **Social media** – helpful for promoting new releases and reaching new and specific audiences, e.g. via LinkedIn groups, Facebook and Twitter;

- **Video** – used by some organisations for providing introductions, overviews, 'how to apply' instructions and to show users how to proceed through sequences of web pages;

- **Case studies** – useful so that individuals can learn from the experiences of others who have similar interests.

Approaches that have usefully helped to promote advice and guidance include:

- Working with partner organisations, such as through networks and fora;
- Drawing on field-based advisors and ambassadors;
- Launching materials at conferences and seminars;
- Signposting through newsletters and social medial and
- Via press articles.

> **Case study: GOV.UK**
>
> Government-produced advice and guidance sources tend to be organised through a nested arrangement of categories and subcategories, with titles reflecting topics (and keywords) that users are most likely to search for, such as *Planning permission* and *Owning and renting a property.* For each topic, web pages are often divided into sections with use of a contents page with hyperlinks to section headings to enable ease of navigation.
>
> Gov.UK sources invariably include the date of publication and revision, which are especially important where underpinning policy can be subject to change. Target audiences are not explicitly referenced in these documents but the language is written in a way that seeks to be informative, clear and easy to understand.
>
> Gov.UK materials are also subject to extensive protocols covering Digital Service Standards, testing by accessibility specialists, testing by users (including disabled people, older people, and those needing to use assistive technology), and content designers are guided on use of language and sentence structures[8]. Gov.UK also advocates the use of the internationally recognised Web Content Accessibility Guidelines (WCAG) 2.0 when producing online content[9].

6.5 Increasing collaboration across the sector

By forging stronger collaborative working arrangements with other historic environment organisations, the currency, efficiency and accessibility of advice and guidance could be further improved.

HE should consider opportunities for boosting collaboration with other organisations that produce advice and guidance aimed at the historic environment, such as those mentioned in section 6.4, above.

By starting with an audit of what is currently available, stronger collaboration could help to:

- ensure a more complementary advice and guidance offer;

- collectively identify where there are knowledge gaps and what specific advice and guidance will be needed in the future;

- strengthen the credibility of advice and guidance through a more joined-up and potentially 'mixed-badged' offer;

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[8] Gov.UK Service Manual – available at: https://www.gov.uk/service-manual/helping-people-to-use-your-service/making-your-service-accessible-an-introduction
[9] Available at: https://www.w3.org/WAI/intro/wcag.php

- determine which organisations have comparatively stronger links to particular audiences and therefore provide the best opportunities for disseminating and raising awareness about any new advice and guidance as it gets published;

"We really need a strong and coordinated approach to producing guidance, to avoid duplicating effort and to enable more powerful endorsement."

<div align="right">Professional body</div>

Based on the desk research and initial interviews, other historic environment organisations say that they generally seek to complement – rather than duplicate – HE's advice and guidance by providing additional material to plug gaps and/or support the interests of their own members. This includes, for example, helping building owners to make choices and navigate challenges when facing repairs to a historic building. On the issue of duplication, one argument is that a range of perspectives on heritage matters can be helpful given the subjective nature of the discipline. Another view is that there is a risk of saturating and confusing users with too much information.

6.6 Identifying and prioritising new content

Based on ideas and suggestions from users, supported by its own intelligence, HE should consider introducing new advice and guidance topics that users say they need, or improve signposting/tagging where this already exists but may not be obvious.

A list of new and additional advice and guidance topics requested by survey respondents is presented in Appendix 2. Clearly, resources would prohibit HE being able to respond to all requests and it is possible that some will relate to advice and guidance that is already available, indicating an awareness gap that potentially needs addressing.

HE should therefore consider from the list which new topics look potentially viable as new content. Onward development should take account of earlier recommendations for better tailoring of content to the target audience and working collaboratively both within and outside of the organisation to help strengthen the content and promote to users through different member groups.

As an additional suggestion Historic England should consider reviewing the effectiveness of its advice and guidance in the planning process and appeals decisions, i.e. to determine whether it has carried the weight expected.

6.7 Wider consultation on new topics

HE should consider being more widely consultative across the sector when developing advice and guidance, to avoid a situation where content is occasionally perceived as rushed and questions raised concerning its accuracy.

Several users mentioned HE's Advice Note covering Curtilage, which was recently withdrawn following concerns around its implications for farm buildings within the curtilage of listed farmhouses. HE's response to doing so appears to have been well received, although the feeling is that wider consultation at the outset would have been more beneficial.

HE might also consider adding a 'Comments' button or email address to its web pages, enabling users to easily flag up to the document owner any apparent inaccuracies or other observations with ease.

6.8 New registration facility for user updates

HE should consider establishing a registration system so that users can subscribe to updates about new and upcoming advice and guidance. This would help to improve awareness and engagement.

The research has identified that more than three quarters of survey respondents (77%) would be interested in registering for updates if such a feature were to be made available via HE's website, with most in favour of email updates.

This could be facilitated via a registration form online, with several options covering aspects such as:

- new advice alerts;
- consultation opportunities; and
- general updates/information.

6.9 Development of training tools

There may be merit in developing a series of structured online training modules, using a variety of delivery platforms (e.g. online tutorials, webinars, videos and podcasts) and these should be clearly pitched to their target audience. Additional research could help to identify potential content, delivery solutions and what else already exists in the marketplace.

Almost three quarters of survey respondents (74%) say they would find it useful if HE made available a series of structured online training programmes for imparting advice and guidance. Online modules and tutorials are the most popular delivery option.

It is important to note that the idea of such a scheme was asked directly of survey respondents and, had that not been the case, it is unclear if the suggestion would have been raised. Workshop participants are generally warm to the idea, for example producing and hosting videos of face-to-face training events that might otherwise only reach a small audience, as well as running bite-sized 'masterclasses tailored to a particular target audience.

Based on users' suggestions for topics. the following 'top five' have emerged and would be worthy of consideration, perhaps as an initial pilot:

- Conservation principles, including an 'idiots guide';
- Setting of heritage assets;
- Assessing significance in practice;
- Listing in practice;
- Non-designated heritage assets how to use this legislation, e.g. for agricultural barns.

Options for making training content particularly attractive could include modular content and tutorials (possibly with quizzes; as well as webinars and other practical 'how-to' training. For professionals, Massive Online Open Courses (MOOCs) could be developed to assist heritage professionals with Continuous Professional Development (CPD). While some kind of accreditation or certification from HE could potentially carry weight, the value and currency of such an accreditation would need to be carefully considered from what might essentially be a very short course.

Consideration should also be given to whether any such training programme should be marketed more towards professionals and/or amateurs, with one interviewee questioning whether that would be asking too much of volunteers. One local authority made the point that that online training for professionals is already well catered for in the market and arguably reaching saturation point.

Examples of existing tools produced by other organisations are provided below.

Case study:	Case study:
The Royal Town Planning Institute (RTPI) has established 'RTPI Learn'[10], a virtual learning site to support planners increase their knowledge of planning, online. The resource offers free modules for planners, including a mixture of text, web links, video clips and diagrams as well as interactive quizzes with instant feedback. RTPI Learn modules can count as CPD for RTPI members.	**The Institute for Historic Building Conservation (IHBC)** has a dedicated online 'Toolbox'[11], which sorts resources into the following categories: • Research Notes; • Guidance Notes; • Standards and Guidelines; • Publications; • Consultations; • Self-Starters; • IHBC Conservation Wiki; • Perspectives and Feedback; and • Caring for your Home.

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[10] Available at: http://www.rtpi.org.uk/education-and-careers/rtpi-learn/
[11] Available at: http://ihbconline.co.uk/toolbox/

Appendix 1. Survey Respondent Profile

Table 5 Survey respondent groups

Cluster group 1	Main role	No. respondents
Building Owners & Managers	Owner or manager of a heritage asset (for example, historic building, scheduled monument, registered park or garden)	19
Local Authorities	Local authority/National Park archaeologist	51
	Local authority/National Park built environment/conservation officer	81
	Local authority/National Park planning official	8
Contractors & Consultants	Contractor - archaeology	23
	Contractor - buildings	22
	Consultant - planning	29
	Consultant - archaeology	9
	Consultant - conservation	49
	Government department or agency	12
	Professional association	5
Universities & Colleges	University or college	11
Societies & Community Groups	National amenity society	9
	Local society or community group	27
Others	Government department or agency	
	Professional association	
	Independent researcher	13
	Student	5
	Member of the public	33
	Other	17
Total:		**423**
Cluster group 2	**Main role**	**No. respondents**
Planning Specialists	Local authority/National Park planning official	8
	Consultant - planning	29
Archaeology Specialists	Local authority/National Park archaeologist	51
	Contractor - archaeology	23
	Consultant - archaeology	9
Buildings/Conservation Specialists	Local authority/National Park built environment/conservation officer	81
	Contractor - buildings	22
	Consultant - conservation	49
Total:		**272**

Appendix 2. Suggestions for New/Additional HE Advice and Guidance

The following list sets out survey respondents' suggestions for new/additional advice and guidance (cf. section 6.1). Every effort has been made to combine/collate suggestions   on this list and it is possible that some suggestions may relate to advice and guidance which already exists but is unknown to the respondent in question.

Aspects of the fishing industry such as fish cellars, capstans and shellfish baths
Advice about the role of 'Local' asset designation in Neighbourhood Planning
Advice on HE policy formulation to ensure authorities are best exploiting the "public benefits" aspects of development management i.e. delivering museums/gallery space, better interpretation, securing restoration of heritage assets etc.
Advice on the process and appropriateness of article 4 directions with some case studies
Advice tailored specifically for Local Authority Conservation Officers
Agri-environment
Alterations to local interest buildings
Appeal preparation
Applications for buildings covered by Assets of Community Value (ACV) status
Archaeo-botany
Archaeology and radiography, including digital
Assessing National Importance through NPPF
Assessing non-designated assets where they may be of equivalent significance to scheduled monuments
Assessing significance of specific asset types
Assessment of harm to the significance of heritage assets - to provide greater clarity on the suitability of methods used
Basic and clear guidelines for new listed building owners
Basic 'how to' guidance for Councillors on assessing conservation/heritage significance
Battlefield archaeology
Conservation statements for projects that will involve repairs or conservation or interventions to historic timber frame buildings
Conserving metalwork
Coping with electric vehicles and driverless cars in historic towns
Curtilage
Damp affecting historic buildings/assets
Dating architectural features
Design advice on acceptable extensions
Development technologies and their application to archaeology
Differentiating between substantial harm and less than substantial harm to heritage assets
Digest of recent decisions on appeals or where other local authorities have made particular

decisions or have adopted policies in respect of various conservation/heritage issues
Digital data archiving/management
Documenting, evaluating, and assessing impacts to industrial sites
Effective advice on heritage at risk
Effective and appropriate use of volunteers in archaeological project work
Engaging consultants
Enhanced outcomes from conservation plan-led management
Essential training for newly elected local authority members
Examples of good church conversions and historic/modern shop fronts
Flooding of historic buildings - especially working with insurance firms
Guidance on how the HE Designation team and planning terms work together
Heritage Project Management, for example when an Urgent Works Notice is served and the local planning authority needs to procure the services of architects/contractors
Heritage Statement templates
Historic mortar specifications and properties
How to engage with local authorities
How to protect non-designated heritage assets
Identifying, documenting, evaluating, and assessing impacts to cultural heritage landscapes
Initial post-excavation processes by material type (pottery, animal bone etc), including cleaning, packing in the field, handling, identifying material for more detailed analysis (burnt-on residue etc.)
Landscapes - space in and around settlements, settlement fringes, entrances and approaches to settlements
Listing of post-1914 buildings, especially churches and buildings in the public realm
Materiality - including weatherboarding
More clarity on assessing the setting of heritage assets as part of Environmental Impact Assessments
More detailed advice regarding rural planning with particular reference to the setting of conservation areas and highways
More detailed and illustrated guidance on particular building types, with them emphasis on architectural history and understanding
More information on why individual buildings have been added to the listing register
More links to other institutions directly influencing policy, heritage, management and governance in relation to the historic environment
More on Industrial Heritage (alongside titles already covered such as Railway Warehouses)
Nothing specific to suggest but guidance will need to be kept up to date and new areas added as issues and situations arise.
Period-specific advice
Practical advice to householders
Practical Building Conservation series could be made into advice so the cost isn't a barrier to people using the best possible information to guide repair decisions
Production of, and what is acceptable for an assessment of, significance. This should defend why an assessment is needed and why poor quality assessments do not assist effective

managed change.
Proprietary materials and products, particularly those that are replacing traditional materials, e.g. when it is appropriate to use mastic
Protection of non-designated heritage assets
Radiocarbon dating
Repair Guides (5 books) should be available for free
Repairs to Grade II Listed buildings, including information for owners on the dangers of engaging contractors will little or no experience of working with historic building fabric
Retention of character in conversions
Roles of Heritage Professionals
Sampling strategies and case studies
Selection of lime products for use in conservation and restoration
Signage and advertising in a heritage context
Simple guide to enviro sampling for non-specialists
Small domestic structures associated with subsistence living, such as bulb plots, goose houses, bee boles etc.
Solar farms
Stone types, uses and sources
Technical guidance on all historic materials- in particular where modern interventions are proposed, and the effectiveness of these interventions determining if a building is curtilage listed
Thatching and the importance of long-straw
Thermal efficient windows - impact monitoring
Townscapes
Treatment of human remains
Undertaking cost-benefit analysis
Upgrading and replacing fire doors
Use of heritage in delivering economic development
Use of hot lime (as there has been a recent revival in this technique)
Village/town morphology