

PERTH AND KINROSS COUNCIL

Environment and Infrastructure Committee

14 March 2022

Service Level Agreement with Perth and Kinross Heritage Trust.

Report by Head of Planning & Development

(Report No 22/56)

This report provides an update on the collaborative working undertaken by Perth and Kinross Heritage Trust and the Council. It seeks approval of the attached revisions to the Service Level Agreement for the provision of defined services by (i) the Trust in relation to archaeological and conservation services; and (ii) the Council in relation to the provision of professional and technical support.

1. BACKGROUND / MAIN ISSUES

Partnership with Perth and Kinross Heritage Trust

- 1.1 Perth and Kinross Heritage Trust (PKHT) was set up as a partnership between Perth and Kinross District Council and the Gannochy Trust in 1988, to provide a mechanism to secure external funding for investment in the historic environment and to act as vehicle for development and promotion of heritage assets. The Trust initially also had a role in relation to investment in countryside access facilities, but this was subsequently amended following the establishment of Perth and Kinross Countryside Trust (PKCT) in 1997 to undertake this activity.
- 1.2 Perth and Kinross Heritage Trust is nationally recognised as a centre of excellence for community archaeology and a regional hub for historic building conservation and traditional building skills. With Historic Environment Scotland as additional partners through their ongoing support of the Perth City Heritage Fund, the Trust represents a successful and well established partnership of local and national organisations. The Trust's objectives align with those of the Council in relation to maximising benefits from the area's historic environment and heritage assets.
- 1.3 PKHT's vision is for: *"A Perth and Kinross that values, embraces and enhances the economic, social and environmental benefits of its historic environment"*
- 1.4 PKHT currently secures funding of approximately £850,000 per annum for investment in historic built environment in relation to historic buildings grants and outreach work currently via Historic Environment Scotland (HES), Heritage Lottery and Gannochy Trust. Most notable recent funding relates to Gannochy Trust's ongoing contributions to core activity and appointment of staff to develop proposals for area-based investment in Bridgend/Kinnoull,

Perth and managing grants from HES including contributions to the City Heritage Fund.

- 1.5 The Perth City Heritage Fund was established in 2012, following restoration of city status and covers the Perth Central and Kinnoull Conservation Areas. Funded by the Scottish Government regeneration strategy for cities through HES, the scheme contributes to economic regeneration by grant-assisting owners of historic buildings. This is for high quality repairs using traditional materials and best conservation practice supplementing support from the Council's Vacant Property Initiative and Housing improvement and repairs. Tranches 1 (2012-2015) and 2 (2015-2018) provided £1.1m of grant assistance to 48 projects, drawing in a total investment of over £2.5 million to the conservation and repair of Perth's historic buildings. Tranche 3 (2018-22) has targeted comprehensive repairs to historic tenements in multiple ownership and has seen completion and ongoing investment in significant key buildings on Perth High Street and Atholl Street.
- 1.6 The Trust have been investigating the viability of a Traditional Buildings Health Check Scheme in Perth, with support from both Historic Environment Scotland and Perth & Kinross Council. Based on an ongoing scheme in Stirling, itself influenced by a Dutch service for inspecting listed buildings, the scheme would encourage proactive maintenance of buildings and contribute to revitalising Perth while stimulating the construction industry. An Options Appraisal, funded by PKC was produced in 2021 and plans for pilot inspections, funded by both HES and PKC are planned for 2022, to drive up demand and support.
- 1.7 The Trust has delivered successful programmes of traditional building skills training since 2012, through projects like the Tay Landscape Partnership (2014-18). This is recognising the need for improvement of local heritage construction skills to assist physical regeneration as well as potential for significant social and economic benefits for academically disengaged and disadvantaged people to learn new skills in a practical working environment. The project addresses an acknowledged skills gap in the building sector along with difficulties in creating pathways between the school curriculum and industry. To date, the Trust have delivered heritage skills training to 4,645 people. New digital training platforms have extended the reach in the last year.
- 1.8 The Trust has also delivered Doors Open Days since 1996, as part of Scotland's largest free festival celebrating heritage and the built environment. It gives residents and visitors the opportunity to visit historic, civic, and interesting buildings not usually accessible to the public for free. Co-ordinated nationally by the Scottish Civic Trust as part of European Heritage Days, the event is usually delivered by local authorities across Scotland. Over 90,000 people have benefited in Perth and Kinross since 1996.

- 1.9 The Trust also further promotes local knowledge and understanding through its heritage publications and assistance with heritage interpretation and promotion on sites and locations throughout the area. Augmented digital reality platforms have been developed in Perth to link with investment and future promotion of historic collections and the area's ancient roots at the Perth City Hall.
- 1.10 Further significant support is being sought from partners for the development of the Lower City Mills as a conservation skills training centre and tourist attraction. The Council has supported this through the lease of the property to the Trust, agreed in December 2018.
- 1.11 Part of the Perth Common Good, the Category A-listed Lower City Mills, Perth saw significant investment by the then Perth and Kinross District Council and The Gannochy Trust in the late 1980s to create a working mill visitor attraction. However, by 2012, the building was inaccessible to the public and on the Buildings at Risk Register. Having agreed a 30-year lease with PKC, the Trust is in the process of securing £2.6M of external funding to fully conserve the building and its unique historic machinery. This will allow public access once again, while establishing a national hub for mills and milling, a centre of excellence for archaeology, historic building conservation and traditional building skills.

PKHT Governance

- 1.12 The Board of Trustees of PKHT Trust is now made up of representatives of the Council, Gannochy Trust and Perth Civic Trust. Councillors Donaldson and Illingworth are currently Trustees of PKHT. The Director of PKHT is currently an employee of the Council who was seconded in 2003 with subsequent revised arrangements in 2016. This also formalised human resource and governance arrangements in relation to reporting to the Trustees in respect of allocation of duties in accordance with the Trust's business priorities. Professional advice/ technical support from officers of the Council is available to the Trust from the Communities Service, in respect of conservation/cultural/heritage/planning/development and from Education and Children Services in relation to education outreach. The Trust also currently receives IT support from Corporate & Democratic Services.

Support for PKHT Services

- 1.13 The Council previously provided funding to PKHT for grants for the repair and improvement of historic buildings and the provision of archaeological and architectural services. Funding for grants was withdrawn because of agreed budget savings in 2011. However, the Council has continued to provide core funding for archaeological and conservation record management services. This supports the Council's development management service via a Service Level Agreement (SLA). Core and professional technical support services provided via the Council referred to above are broadly identified within the

SLA, along with a commitment to provide economic and development advice, and input to inform and support agreed regeneration priorities.

- 1.14 The Council and other partners of PKHT have reviewed the SLA and partnership arrangements in relation to current and required activities to support investment in the historic environment via PKHT. This concludes that there is a need to continue the services provided by each party within the SLA for three years from 2022 -2024, to reflect the provision of archaeological and conservation services as well as support broader partnership regeneration activity via the Service Level Agreement.
- 1.15 Following discussion with PKHT and the Council, the Gannochy Trust has offered to extend its additional financial contribution to PKHT. The offer related to funding support for the review of enhancement proposals in Bridgend and Crieff, subsequent development of bids for funding to secure investment in the area along with historic buildings and additional related support for traditional construction skills.

2. PROPOSALS

Service Level Agreement

- 2.1 The Trust has been extremely successful, with the support of the Council, in securing additional external funding for investment in the historic environment. This is partly due to leverage generated from the funding that the Council provides directly to the Trust via the SLA. It has also been supported by the Council's revenue and capital investment in relation to the historic environment and historic buildings.
- 2.2 As part of the planning services the Trust supports:
 - maintenance of the Historic Environment record
 - 25-45 pre-application and scoping enquiries per year,
 - detailed screening of 75-120 applications per year
 - around 40-75 conditions per year resulting in archaeological work
 - archaeological monitoring work from field to final publication
- 2.3 The Trust has helped support required major archaeology investigations associated with the A9 improvements over the last 3 years.
- 2.4 A review of business needs suggests that there is an ongoing requirement to support management of the Trust, partnership working, and costs associated with continuing provision of archaeological services in respect of archaeological advice and the Council's statutory planning function.
- 2.5 The Trust currently operates Doors Open Day without support and other cultural, archaeological, and architectural education outreach activity and events and is seeking resources to sustain this activity as occurs in other local authority areas.

- 2.6 Continuing this outreach activity would be of benefit within the context of the focus on Ancient Roots and linked promotion of heritage collections and assets and investment in the new cultural venue at Perth City Hall. This activity provides links to visitor experiences and training opportunities throughout the Council area supporting growth of the tourist economy and conservation skills.
- 2.7 The provision of additional advice from the Trust on area-based investment and property related conservation services has previously increased capacity and informed conservation advice and specifications associated with increased activity relating to the improvement, repair and maintenance of both public and private buildings and property. This advice has been provided in relation to review of conservation enhancement proposals in Bridgend, the Vacant Property Initiative, and housing repairs.
- 2.8 A current review is being undertaken within the context of the recently announced Scottish Government Heritage and Place Programme to determine how internal capacity and external funding could provide additional support. Rather than retaining this within the scope of the Service Level Agreement, the following services have therefore been removed and will, if possible or required, be resourced independently:
- preparation of Conservation Area Appraisals
 - development of Conservation Area Regeneration Scheme Bids
 - Historic Buildings and Monuments maintenance advice
- 2.9 The proposed SLA specification (Appendix 1) identifies the roles and responsibilities of the Trust and Council respectively in relation to proposed revised services to be provided by the Trust and the funding required from the Council. Proposed changes referred to in paragraph 2.9 above are highlighted within the Appendix.
- 2.10 It is recommended that the revisions to the SLA are supported.

Memorandum of Understanding

- 2.11 Current articulation of the Council's partnership arrangements in respect of the historic environment focuses on areas of collaboration and activity associated with direct financial contributions related to service provision within the SLA with PKHT. Previous reports referred to the development of a separate partnership working framework to allow this to be extended to include the Trust, Council, and other partners, most notably HES, to give greater clarity on broader partnership support and activity. Both the Trust and HES have been reviewing operations and support and, like all organisations, dealing with issues arising from the pandemic. Initial dialogue has taken place and it is suggested that this can be further discussed within the context of regional partnership working and place-based investment frameworks.

3. CONCLUSION AND RECOMMENDATIONS

- 3.1 Perth and Kinross Heritage Trust has been an extremely successful vehicle for providing services to the Council in respect of its conservation planning role and securing investment in the historic environment
- 3.2 It is recommended that the Council continue to secure services from the Trust to support the Council's planning function and continue collaborative working. This is to help support activity relating to area-based investment, the improvement and repair of vacant buildings, property and development and promotion of cultural and heritage assets.
- 3.3 It is recommended that the Council:
- (i) agrees the attached Service Level Agreement specification for the provision of defined services to be provided by Perth and Kinross Heritage Trust and the Council;
 - (ii) agrees to maintain dialogue on the development of a Memorandum of Understanding as the basis for broader collaboration and investment in the historic environment with Perth and Kinross Heritage Trust and other partners

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Approved

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1. IMPLICATIONS, ASSESSMENTS, CONSULTATION AND COMMUNICATION

Strategic Implications	Yes / None
Community Plan / Single Outcome Agreement	Yes
Corporate Plan	Yes
Resource Implications	
Financial	Yes
Workforce	Yes
Asset Management (land, property, IST)	Yes
Assessments	
Equality Impact Assessment	No
Strategic Environmental Assessment	No
Sustainability (community, economic, environmental)	No
Legal and Governance	Yes
Risk	No
Consultation	
Internal	Yes
External	Yes
Communication	
Communications Plan	No

1. Strategic Implications

1.1 This report supports the delivery of the Perth and Kinross Community Plan / Single Outcome Agreement in terms of the following priorities:

- (ii) Developing educated, responsible, and informed citizens
- (iii) Promoting a prosperous, inclusive, and sustainable economy
- (v) Creating a safe and sustainable place for future generations

Corporate Plan

1.2 This report supports the achievement of the Council's Corporate Plan Priorities:

- (ii) Developing educated, responsible, and informed citizens;
- (iii) Promoting a prosperous, inclusive, and sustainable economy;
- (v) Creating a safe and sustainable place for future generations.

2. Resource Implications

Financial

Revenue

- 2.1 Costs associated with the revised Service Level Agreement can be met within the current Communities Service revenue budget as they relate to existing staff and operational cost levels as a result of revisions to service specification. The Scottish Government's Heritage and Place Programme may provide capacity for external funding support

Workforce

- 2.2 There are no immediate changes to current workforce arising from the recommendations of the report although current re-assignment of duties is under consideration to increase internal capacity for conservation related activity

Asset Management (land, property, IT)

- 2.3 There are no immediate implications in respect of asset management arising from the recommendations of the report.

3. Assessments

Equality Impact Assessment

- 3.1 Under the Equality Act 2010, the Council is required to eliminate discrimination, advance equality of opportunity, and foster good relations between equality groups. Carrying out Equality Impact Assessments for plans and policies allows the Council to demonstrate that it is meeting these duties.
- 3.2 The proposals have been considered under the Corporate Equalities Impact Assessment process (EqIA) with the following outcome:
(i) Assessed as **not relevant** for the purposes of EqIA

Strategic Environmental Assessment

- 3.3 The Environmental Assessment (Scotland) Act 2005 places a duty on the Council to identify and assess the environmental consequences of its proposals.
- 3.4 The proposal recommended in this paper has been considered under the Act and the pre-screening has identified that the proposal will have no environmental effects, it is therefore exempt. The reason for concluding this is that the recommendation in this report will have no direct environmental

effects as they relate to management and governance arrangements in respect of the relationship between the Council and Trust. Any subsequent proposals or recommendations for direct investment or revisions to planning and economic development policy will have to be fully assessed for community, environmental and economic impacts where appropriate

Sustainability

- 3.5 Under the provisions of the Local Government in Scotland Act 2003 the Council must discharge its duties in a way which contributes to the achievement of sustainable development. In terms of the Climate Change Act, the Council has a general duty to demonstrate its commitment to sustainability and the community, environmental and economic impacts of its actions.
- 3.6 The proposals and recommendation in this report will not have direct impacts as they relate to management and governance arrangements in respect of the relationship between the Council and Trust. Any subsequent proposals or recommendations for direct investment or revisions to planning and economic development policy will have to be fully assessed for community, environmental and economic impacts where appropriate

Legal and Governance

- 3.7 The Head of Legal and Governance has been consulted and agrees with the contents of this report.

Risk

- 3.8 Risk in respect of the Council's relationship with the Trust is mitigated within the management and monitoring arrangements set out in the Service Level Agreement enabling withdrawal from current arrangements if parties to not honour commitments or the required level of service is not provided

4. Consultation

Internal

- 4.1 The Head of Finance and the Head of Legal and Governance have been consulted and agree with the contents of this report.

External

- 4.2 Perth and Kinross Heritage Trust have been consulted in the preparation of this report.

5. Communication

- 5.1 The Council provide support to the Trust in relation to communication of the Trust's activities on projects and areas of mutual interest.

2. BACKGROUND PAPERS

- 2.1 The following background papers, as defined by Section 50D of the Local Government (Scotland) Act 1973 (and not containing confidential or exempt information) were relied on to a material extent in preparing the above report.
- 2.2 Service Level Agreement with Perth and Kinross Heritage Trust, Report to Enterprise and Infrastructure Committee, 23rd November 2011
- 2.3 Service Level Agreement with Perth and Kinross Heritage Trust, Report to Enterprise and Infrastructure Committee, 23rd March 2016
- 2.4 Collaborative Working to Enhance The Historic Environment, Report To Perth and Kinross Council, 22 June 2016
- 2.5 Strategic Policy & Resources Property Sub-Committee, Lower City Mill, Perth - Lease Disposal to Perth Heritage Trust, 18th December 2018
- 2.6 Service Level Agreement with Perth and Kinross Heritage Trust, Report to Environment and Infrastructure Committee, 20th March 2019

3. APPENDICES

- 3.1 Appendix 1 - Perth and Kinross Heritage Trust Service Level Agreement