

A photograph of a historic stone building with a large pineapple-shaped tower on its roof. The building is surrounded by lush green trees and a well-maintained garden with various flowers. The sky is blue with some white clouds.

# BUILT ESTATE ANALYSIS

**BEFS**  
BUILT ENVIRONMENT  
FORUM SCOTLAND



**NATIONAL  
TRUST *for*  
SCOTLAND**

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# ABSTRACT

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**The Built Estate Analysis, undertaken by BEFS with the National Trust for Scotland, examines the Built Estate in detail. Using the newly formed Built Estate Asset Register to assess the current estate including: what types of buildings the Trust has, where they are located, how old they are, what designations apply to them, and how they are used.**

Historically there is provision of multiple sites across a wide range of heritage and geography. The Built Estate Analysis reflects on those learnings. The analysis was undertaken in support of a review of the Portfolio and provides a crucial example of how datasets can support broad questions about the Portfolio and to support prioritisation decisions for the future.

Some assumptions about the Trust's estate are challenged by the data. The Trust's designated built assets are more likely to be designated with the highest level of protection than the national average.<sup>1</sup> The majority of buildings and structures are considered to be in Fair or Good condition. However, not all sites are, or can be, fully accessible to potential visitors.

The Trust's built assets are disproportionately located in rural areas and communities. However, the proximity of Trust buildings near population centres should be set into the context of the disproportionate impact of Trust sites in remote rural and rural areas and the scale of visitor facilities that are provided at sites.

Setting these reflections within the context of a missing national dataset for our historic and existing buildings: The current detailed understanding which the Trust has chosen to resource around its built estate is a sector leading exemplar. As an independent body, the Trust has taken pains to align to national descriptors and can take further steps to align its internal data across geographical, economic, and social descriptors for the data it holds.

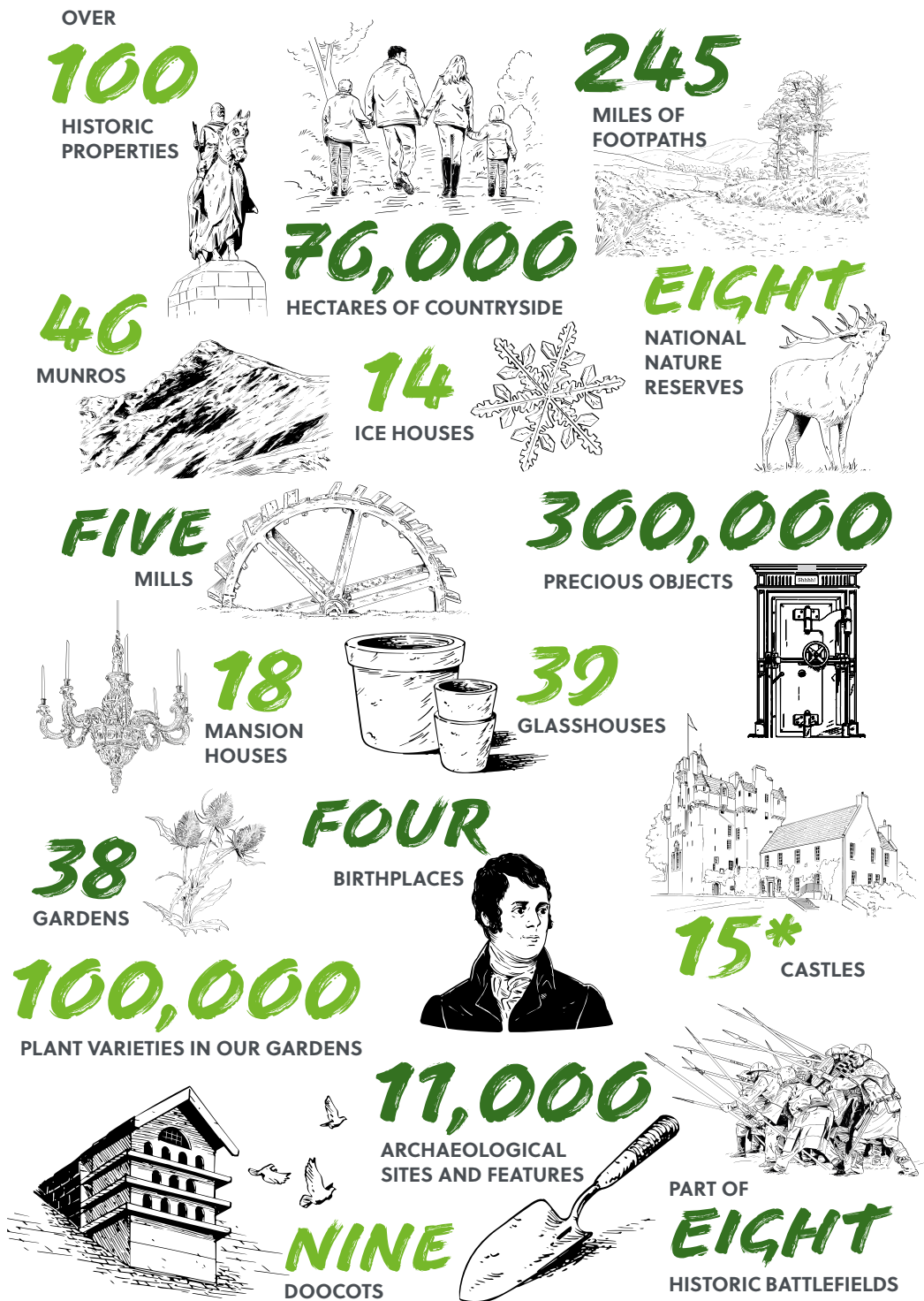
This significant body of work has added to the Trust's understanding of its portfolio. Specifically, it has shone a light on new observations that can be made of the built estate and has given the opportunity to reinforce new discussions around what, and where, future acquisitions could take place. The information within this report and the wider work of the Portfolio Review enables informed decisions to be taken around what stories of Scotland the Trust will tell next.





# 1. INTRODUCTION

NTS owns and operates a unique and complex estate. The Trust's wider heritage portfolio, and the connected intangible heritage, stands alone within Scotland in the number of visited sites and their combination of natural, built, and moveable assets.



Totals quoted reflect understanding as of March 2022.

\*Includes castles under Guardianship Agreement



The Built Estate Analysis set out to understand more about the estate specifically, and its diversity of building type and use. The analysis was undertaken in support of a review of the Portfolio and provides a crucial example of how datasets can support broad questions about the Portfolio and to support prioritisation decisions for the future. The Built Estate Register<sup>2</sup> provides information which can help to review the breadth of the built estate and provide significant insight. The Register represents the first time the Trust has collated categorisation data on the built estate with the purpose of improving understanding and helping to define a national view of the collection. While some gaps remain, the dataset is largely complete.

The process of collating the data is recorded in Appendix: *EXCO and MLG briefing PORTFOLIO REVIEW – Understanding What We Have; Built Estate Asset and Classification Register Update*.

Analysis supporting the Portfolio Review highlights how detailed datasets can support a wide range of Trust activities and are essential, enabling the Trust to ask robust questions of the current Portfolio. The BE- Register is a live database and contains<sup>3</sup> 1179 entries, categorized in a variety of ways to increase the Trust's understanding of the range, type, location, significance, condition and needs of the built portfolio estate.

The answers to these observational queries in turn shape analytical questions, which look at how the information in the BE-Register supports the delivery of the Trust's strategy. This can inform thoughts on the future portfolio, such as exploring conservation, engagement, and representation.

Specific questions might include:

- *Conservation: How does the use of a building impact it's condition?*
- *Engagement: How accessible are the Trust's buildings when mapped against centres of population?*
- *Representation: How does the BE- Register help us understand the Trust's estate in telling the varied stories of Scotland's people and places?*

Setting the Trust's buildings within a national context proved more challenging. Other than sites which

are designated, there is no national 'database' providing the essential details (age, location, materials, condition) for Scotland's historic (pre1919) and existing buildings. Information from asset holders tends to be tightly-held, and relies upon the levels of resource (and accuracy) that have been given to data management. These challenges have national consequences around planning, provision of maintenance including skills and materials, adaptation for climate change, assessing energy use and meeting national net-zero ambitions. The current detailed understanding which the Trust has chosen to resource around its built estate is a sector leading exemplar.

As part of Scottish Government efforts to better understand our historic environment, via the Our Place In Time national strategy, the Trust now have a comprehensive data set that can be shared with others. This has been designed in such a way to integrate within nationally recognised categories and will prove a valuable addition to this national effort.

If similar information was readily available across all aspects of the portfolio, and across other heritage asset holders, gap-analysis could be rapidly assessed, and the stories of Scotland as yet untold, or under-represented, could be identified and secured for the future.





## 2. FINDINGS

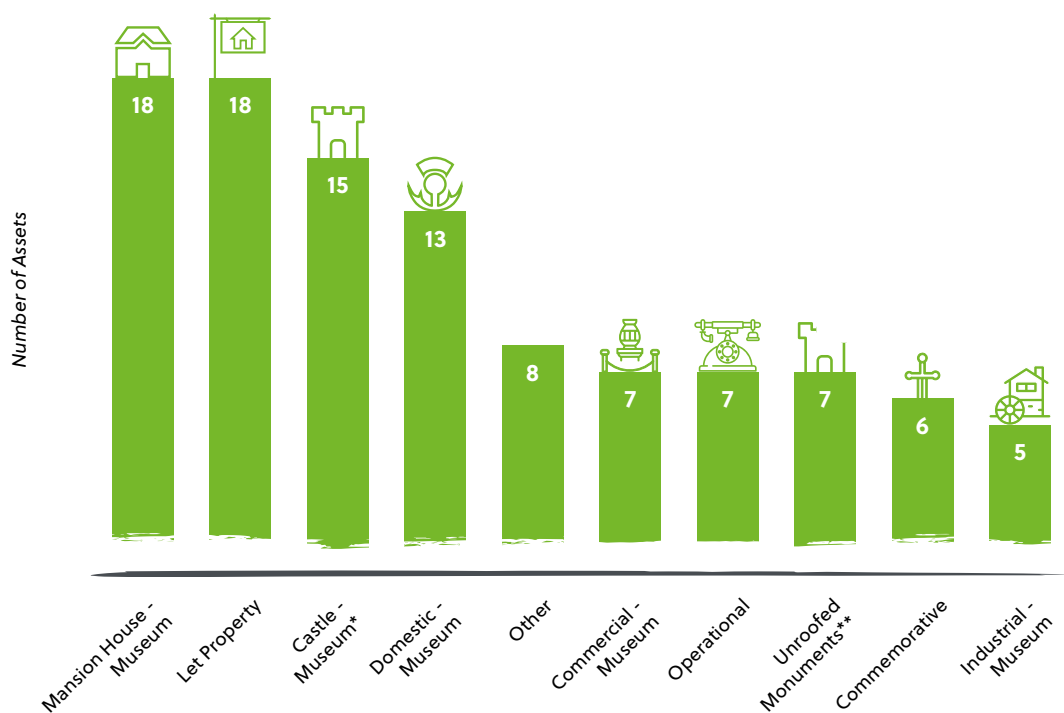
### WHAT TYPES OF BUILDING DOES THE TRUST HOLD?

Within the BE-Register, sites have been classified as either principal (the significant asset to the site) or ancillary. Within the portfolio just under 9% of buildings (8.8%) are identified as principal structures with 89% playing a secondary, ancillary role, and the remaining 2% of entries left blank.

The principal assets have been classified into broad types using categories that are used within the

sector.<sup>4</sup> Over half of the principal assets (56%) are used as museums either in castle, mansion house, domestic, industrial or commercial museum settings. Ancillary assets sites have also been classified according to type. It is not surprising to see that a large proportion of the ancillary building in the portfolio, for which an asset type has been assigned, are residential (27%) agricultural (17%) and used for service infrastructure (15%).

### Principal Built Asset Type



Principal Built Asset Type

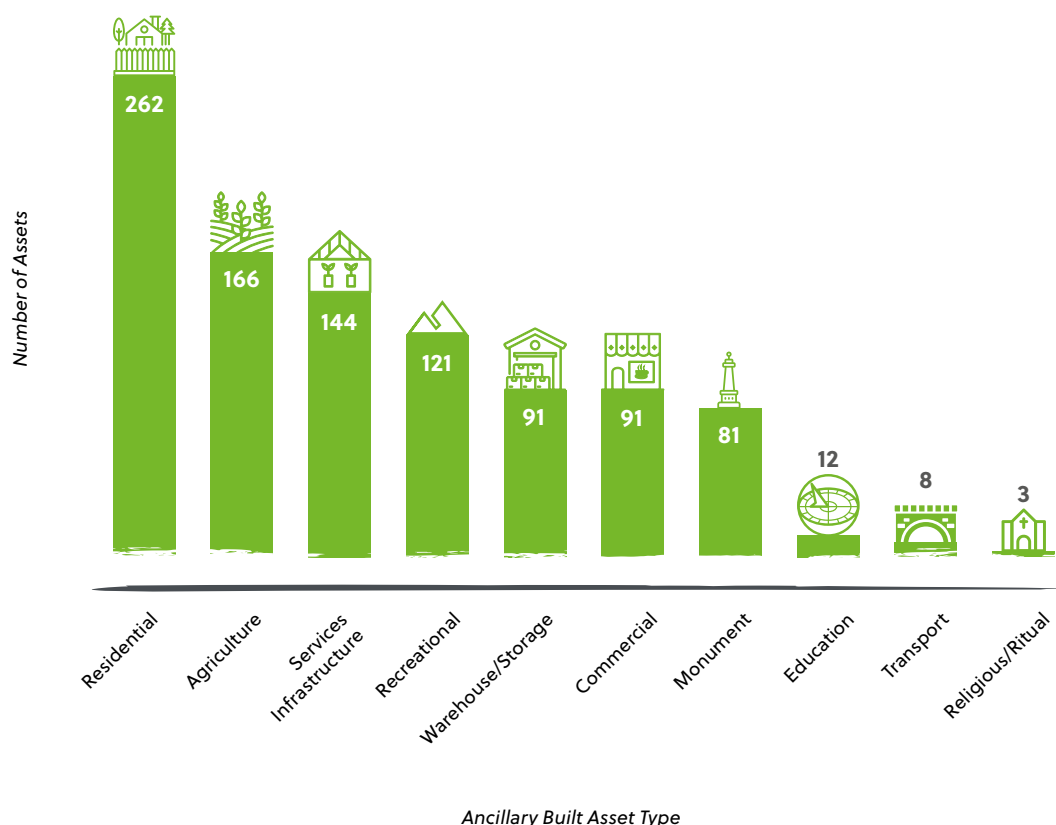
A Built Asset has been assigned as 'Principal' if it was considered to be the most important building at a given site. Principal Built Assets can also be stand-alone assets or, if considered significant, a building that is ancillary to a site at which the primary asset is deemed to not be built (i.e. a garden).

\* 5 of these assets are under Guardianship Agreements

\*\* 2 of these assets are under Guardianship Agreements



## Ancillary Built Asset Type<sup>5</sup>



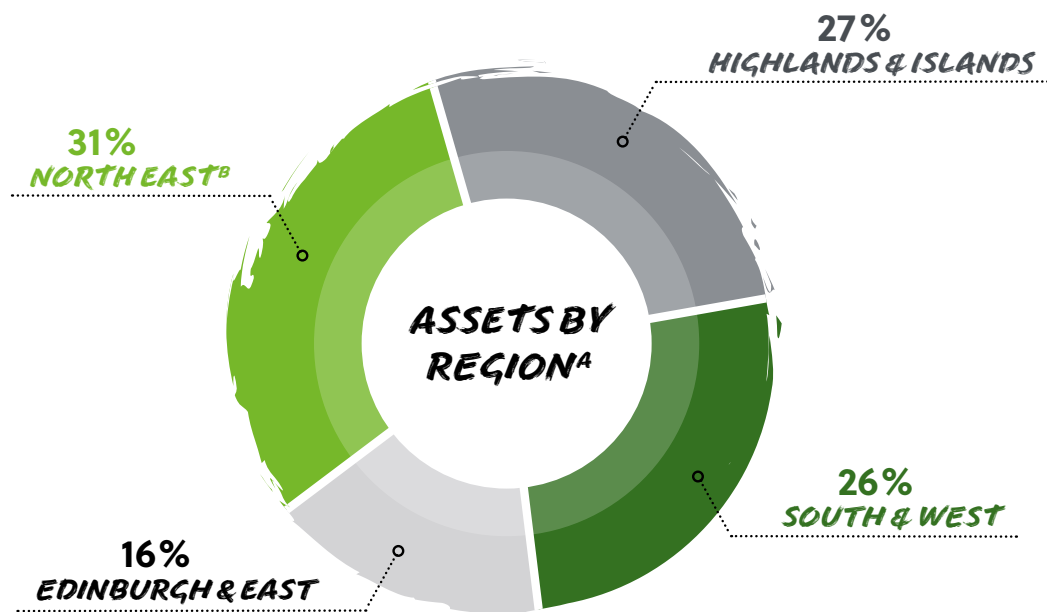
64 assets identified as ancillary do not have a complete built asset type, and nine were identified as unknown. These have been omitted from this graph.

## WHERE ARE THE TRUST'S BUILDINGS LOCATED?

The built assets are generally evenly distributed across the Trust's regions. The North-East regions contains the highest number of buildings (364 or 31%). This is likely to reflect the number of built structures associated with the functioning medium or large rural estates in this region. Edinburgh and the East (193 or 16%) contains the smallest number of built assets which is likely to reflect the lack of sizeable estates within the region and the higher concentration of individual assets associated with the

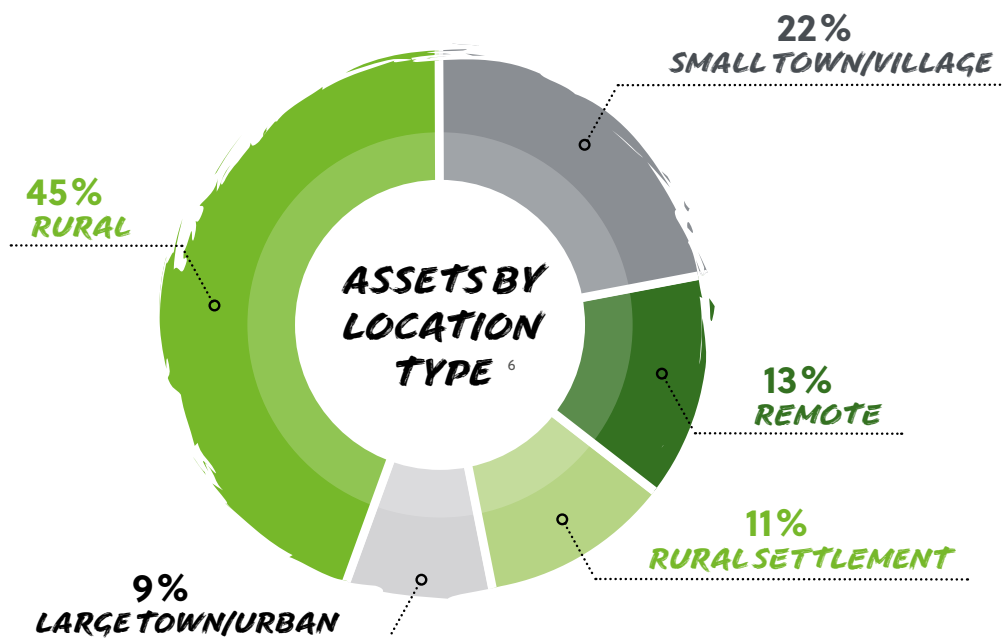
Trust. The recurring disparity in building numbers for rural and urban sites can distort the presentation of locational data when considering headlines numbers.

With that caveat, nearly half of the Trust's built assets are classified as rural (45%), which, when combined with those structures defined as remote and rural settlements, highlight that the Trust's built assets are disproportionately located in rural areas and communities (70% in total). Meanwhile, assets in Large Towns/ Urban represent only 9% of the Trust's built assets.



A Percentages are accurate as of the beginning of 2022.

B The North East includes Mar Lodge which, for purposes of operations, is often considered as an individual operating area.



A small number of built assets have not been assigned a location type.

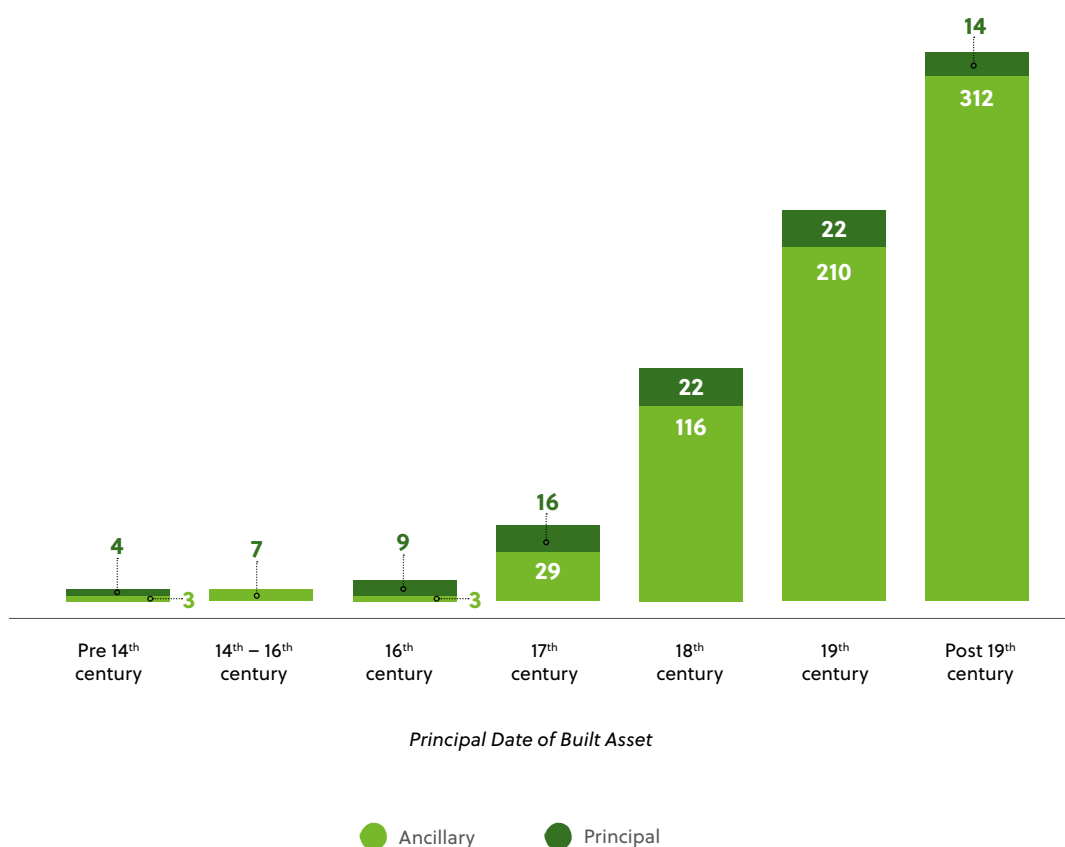


## HOW OLD ARE THE TRUST'S BUILDINGS?

Of the 767 buildings for which a principal date is recorded in the Built Estate Register, 43% were constructed principally after 1900, although this does include a large number of ancillary assets.<sup>7</sup> The portfolio contains a small number of pre-16th century

buildings (1.7% of the buildings for which a principal date is recorded) and a limited number from the sixteenth and seventeenth centuries (7.4%). The estate has a much higher percentage of buildings which can be principally dated to the eighteenth and nineteenth centuries (48%).

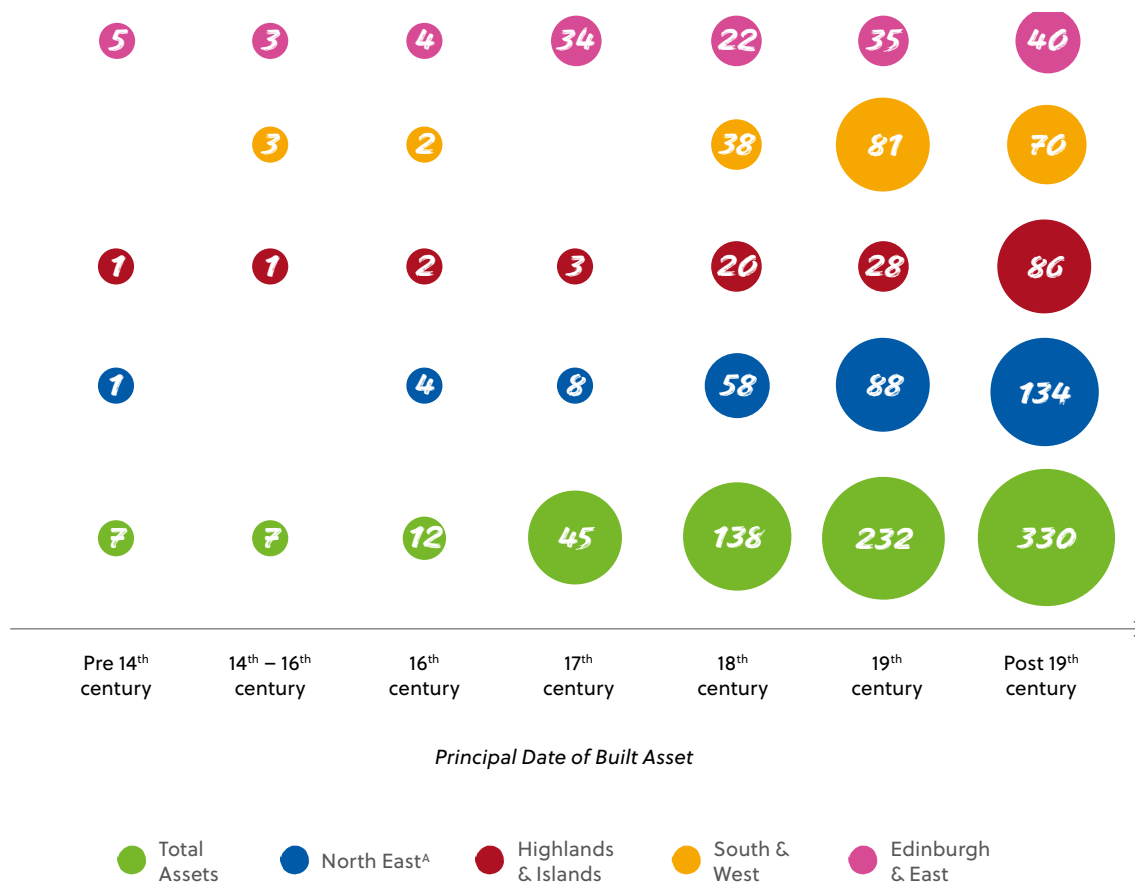
### Principal Date of Principal/Ancillary Built Assets



This graph omits the 408 built assets (Principal and Ancillary) in the Trust's portfolio that were not assigned a Principal Date and the 22 sites that were not assigned as either Principal or Ancillary.

Whilst placing this information in a national context is more demanding, within the Trust some observations can be made: the majority of the Trust's seventeenth century properties, are located in the Edinburgh & East Region, while the Highlands & Islands have a

disproportionate number of properties which date to after 1900. However, there is currently no national dataset which records the location of all historic buildings across the country.



409 Built Assets have not been assigned a Principal Date and have been omitted from this graph.

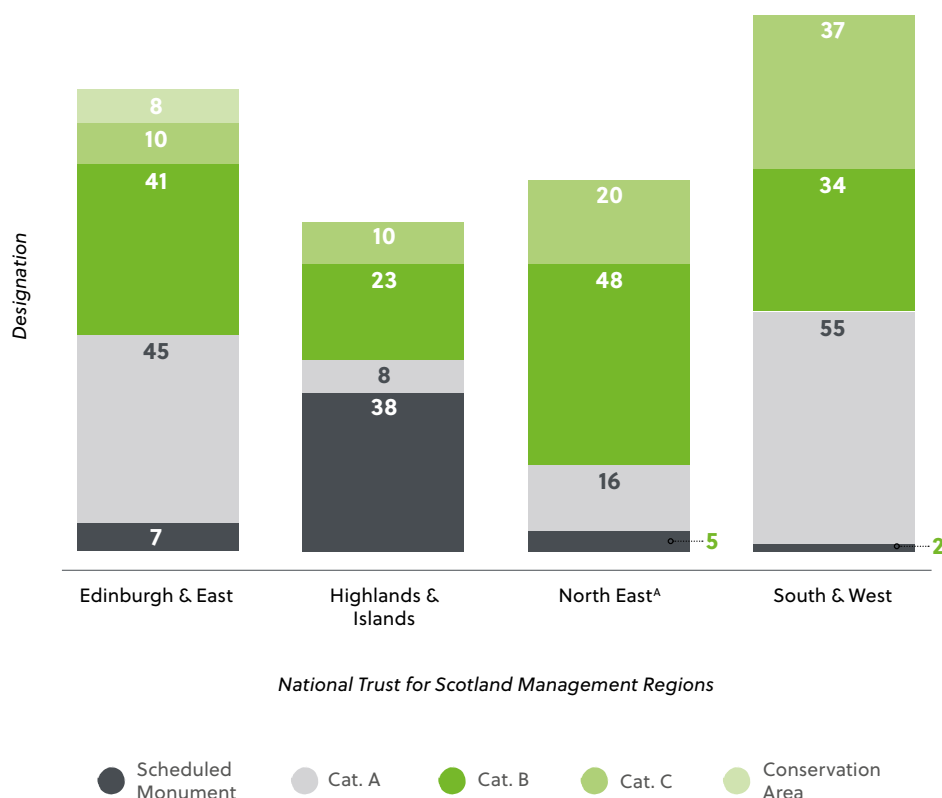
A The North East includes Mar Lodge which, for purposes of operations, is often considered as an individual operating area.



## WHAT DESIGNATIONS APPLY TO THE TRUST'S SITES?

Within the Trust, the majority (83%) of principal assets have some form of statutory designation – 55% are protected at the highest level as Category A listed

buildings with 9% as Scheduled Monuments. 30% of the Trust's ancillary structures are also designated although unsurprisingly a higher proportion are Category B or Category C listed buildings with only 6% of ancillary structures designated as Category A.



A total of 773 built assets (Principal and Ancillary) in the Trust's portfolio do not have a designation and have been omitted from this graph.

A The North East includes Mar Lodge which, for purposes of operations, is often considered as an individual operating area.

Information is nationally available for Designated buildings, with 8% of Scotland's listed buildings classified as Category A. Of the Trust's designated principal assets 66% are designated as Category A while of the Trust's designated ancillary assets 20%

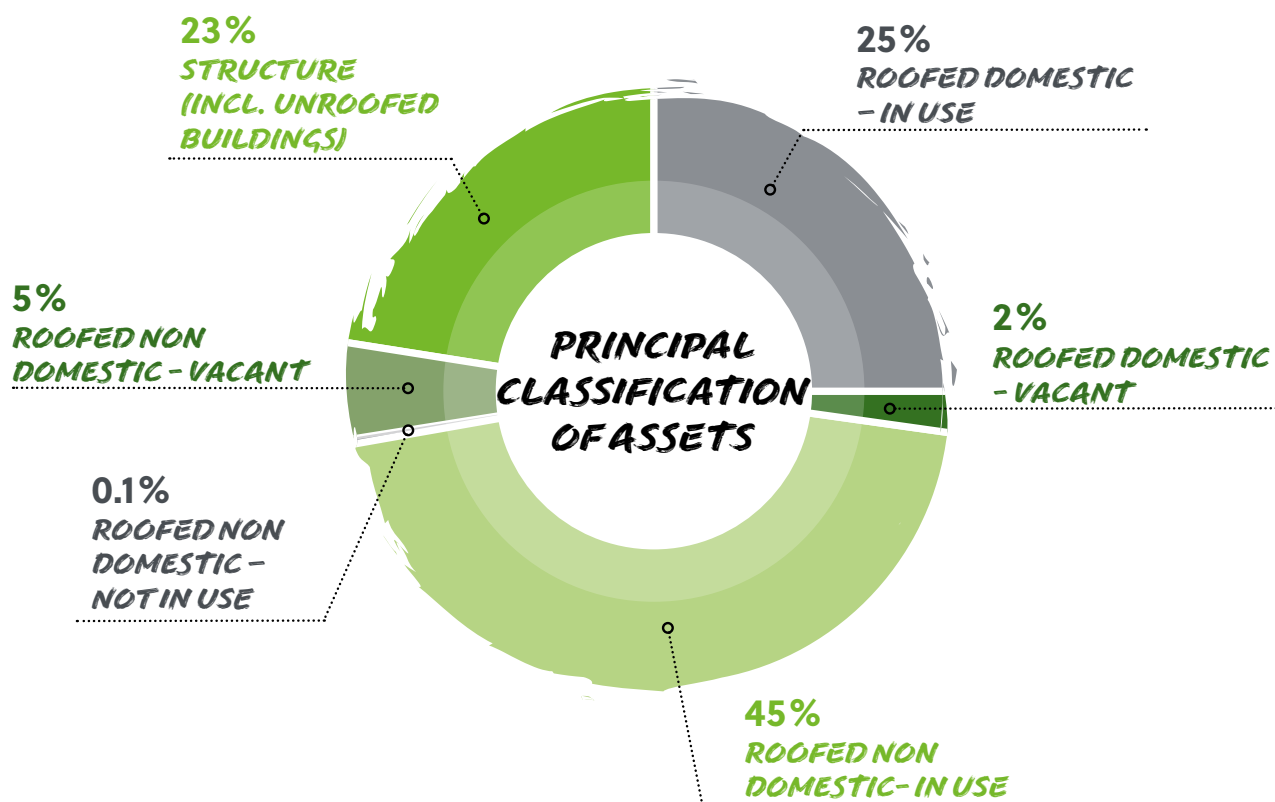
are designated as Category A. This indicates that the Trust's designated built assets are more likely to be designated with the highest level of protection than the national average.<sup>8</sup>

## HOW ARE THE TRUST'S BUILDINGS USED?

70% of the built estate (combining 45% of sites

classified as roofed, non-domestic and 25% of the sites as roofed domestic) is in use; with only 8% of the built estate classified as not in use or vacant.<sup>9</sup>

### Principal Classification of Assets<sup>10</sup>



A small number of buildings were not assigned a Principal Classification type.

Examples, provided to aid clarity, include: Roofed Domestic In Use: Harmony Hall, Melrose; Roofed Domestic Vacant: Pitmedden South Mains Farmhouse; Roofed Non Domestic In Use: Culross Town House; Roofed Non Domestic Not in Use: Mar Lodge, Old Smiddy; Roofed Non Domestic Vacant: Glencoe Leishman; Structure (incl. unroofed buildings): House of Binns Stables.

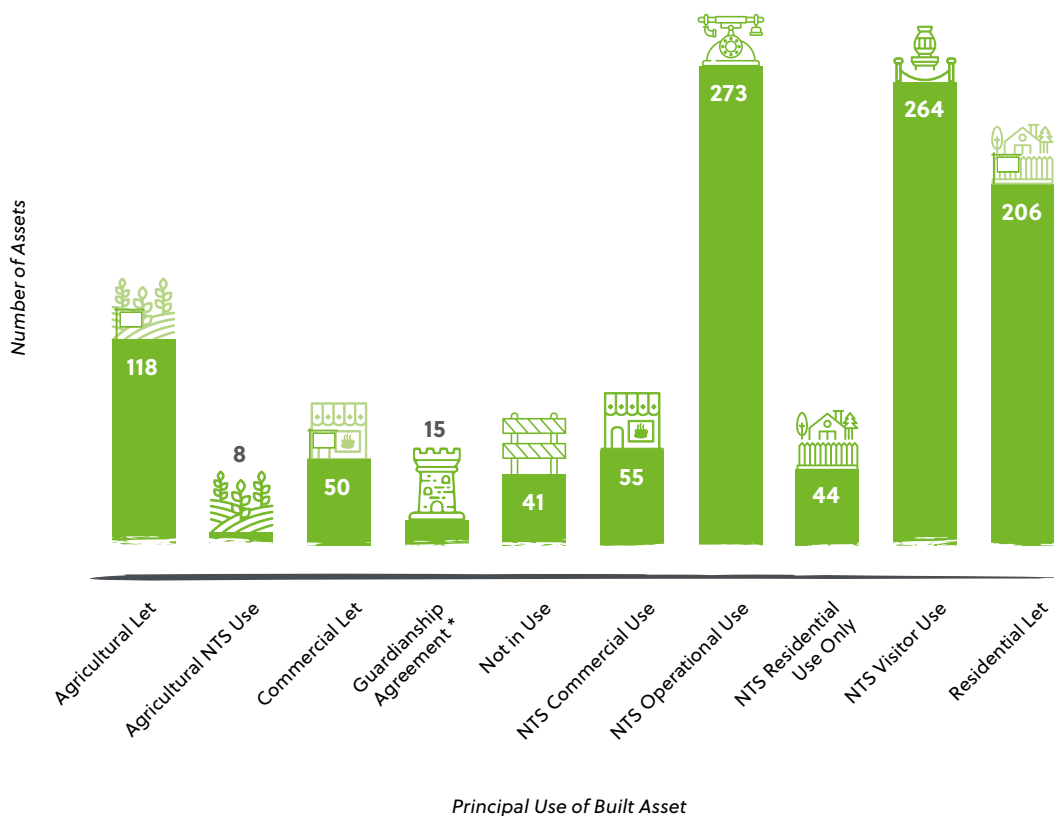
The percentages for this graph do not equal 100 due to rounding.

23% of the structures have been classified as a 'Structure' (including unroofed buildings). This category is broad and can include memorial structures, unroofed buildings and has also been used to capture structures which support the operation of a site, but which do not naturally fit into

other categories (such as walled gardens or bridges). For a historic estate this figure is unsurprising. For comparison, Historic Environment Scotland (HES) classified that 34% of their estate was roofed, with 66% calculated as either unroofed, a monument or a standing or carved stone.<sup>11</sup>



## Principal Use of Assets



Principal Use of Built Asset

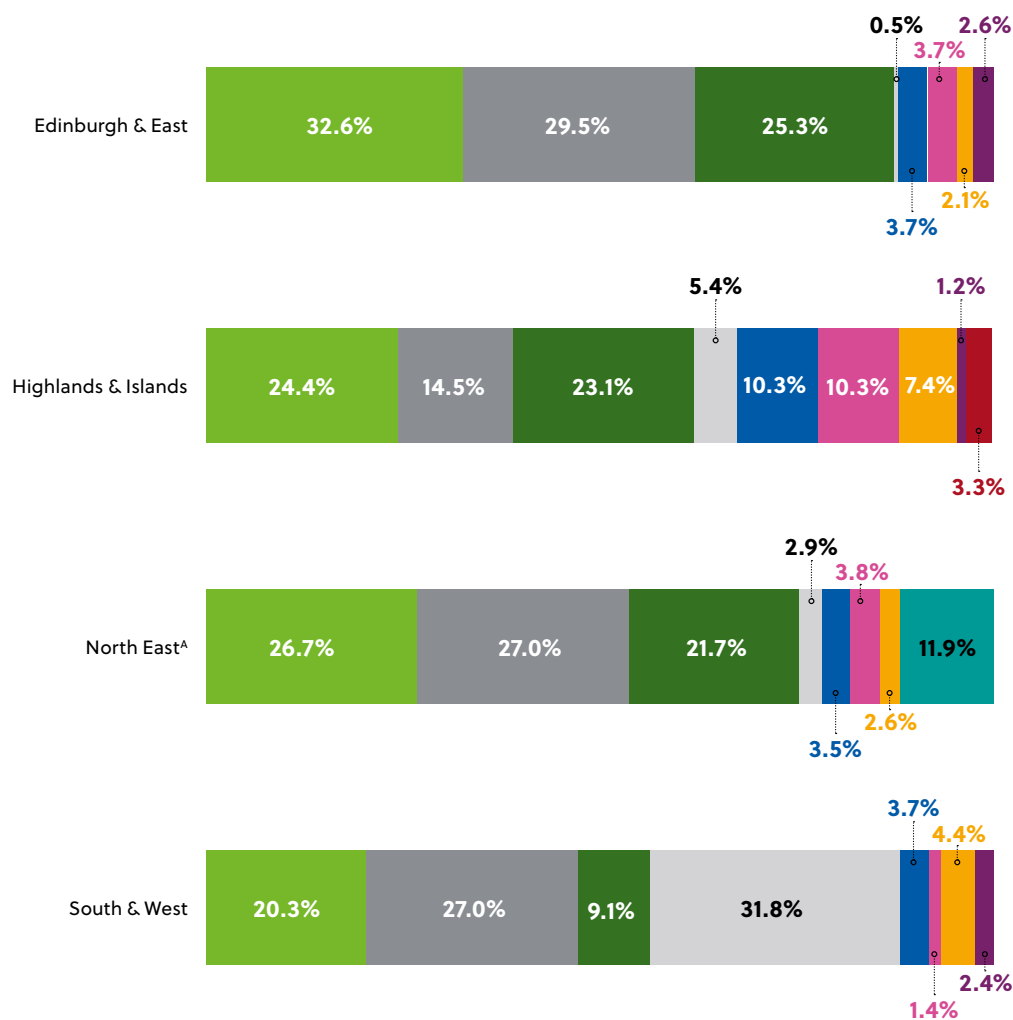
A small number of built assets were not assigned a Principal Use.

\* This total relates to the number of built assets recognised to be under Guardianship Agreements rather than the number of sites under Guardianship Agreements.

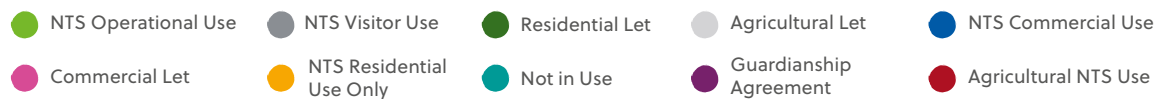
Not unsurprisingly, the majority of the buildings in the Portfolio (50%) are used primarily as a visitor attraction or for supporting operations.<sup>12</sup> The let estate including residential, agricultural and commercial leases account for 35% of structures.

There is variation in how buildings are used depending on their location. The West region, for example, has a much higher proportion of

agricultural lets when compared to other regions; principally impacted by the number of leases noted for Threave. The Highlands & Islands have a smaller proportion of buildings for the specific use of Trust visitors than other regions, while the number of operational buildings, unsurprisingly, looks to broadly correlate with the number of buildings used for visitors.

Principal Use of Assets by Region<sup>13</sup>

Principal Use of Building



A small number of built assets were not assigned a Principal Use.

\* This total relates to the number of built assets recognised to be under Guardianship Agreements rather than the number of sites under Guardianship Agreements.



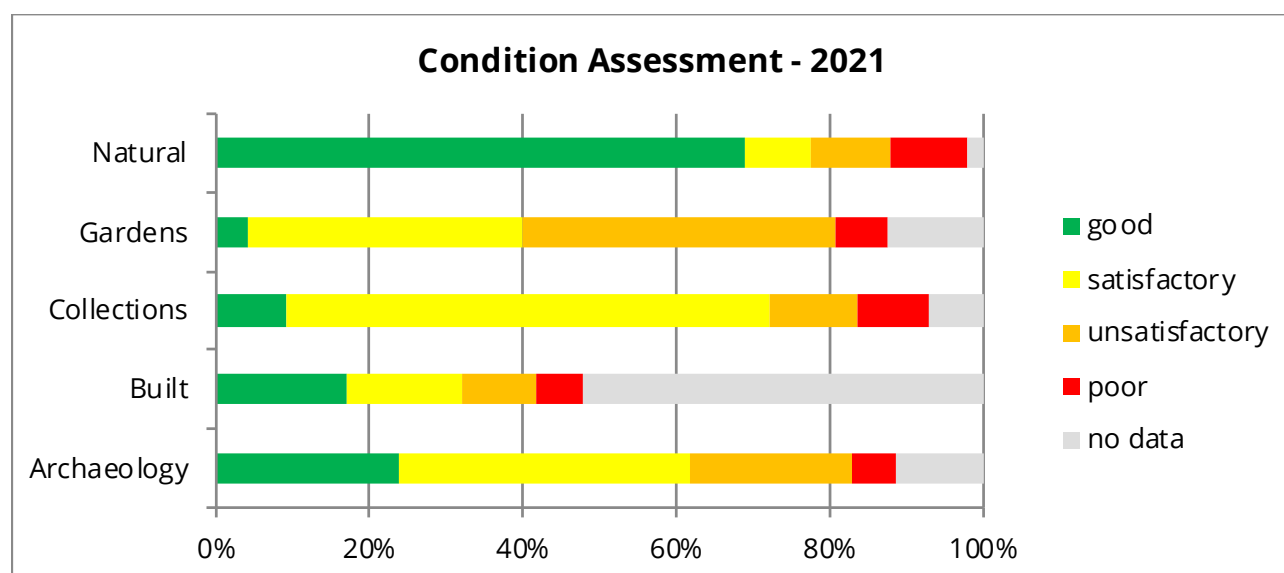
### 3. BUILT ESTATE REFLECTIONS

*How can the information in the Built Estate Asset Register support the delivery of the Trust's strategy and organisational purpose?*

#### CONSERVATION: BOTH A CORE TRUST PRINCIPLE & KEY INFLUENCE ON TRUST ACTIVITY.

The Trust reports on the condition of its built assets to support the Conservation Performance Indicator (CPI). It also reports separately on its Buildings At

Risk.<sup>14</sup> This CPI is based on condition knowledge of Category A listed assets, according to a programme of condition survey work. If the condition cannot be evidenced, or the condition survey is older than 10 years, then the structure is reported as having no data. The Built estate remains the one area with a sizeable data gap in 2021.



The CPI condition assessment for 2021 reported that there was a 52% data gap for built structures. For the data available, the following condition was reported:

	good	satisfactory	unsatisfactory	poor	Grand Total
<b>Built</b>	35.9%	31.4%	20.5%	12.3%	100.0%

Against the NTS national<sup>15</sup> condition average:

	good	satisfactory	unsatisfactory	poor	Grand Total
<b>Total</b>	29.6%	38.3%	22.8%	9.4%	100.0%
<b>KPI</b>		67.9%			

The CPI condition measure, plotted against a trend, indicates a deterioration in the condition of our 'poor' and 'unsatisfactory' rated buildings:

	good	satisfactory	unsatisfactory	poor
<b>Built - 2021</b>	35.9%	31.4%	20.5%	12.3%
<b>Built - 2020</b>	35.6%	31.1%	21.2%	12.2%

Concerns regarding this condition measure, and sizeable data gap, prompted a concerted effort to gain more condition data, with a new suite of Health Check surveys proposed during 2022/23. The Trust can therefore expect significantly greater levels of data to become available for use in this KPI, improving the accuracy of this element in coming years. At the same time, with coverage of Health Checks expanding beyond A-listed buildings, the number of assets being assessed under the Conservation KPI will also grow significantly.

During the creation of the BE-Register, the surveyors were given the option to report as to whether a building or structure was in good, fair or poor condition, based on their current working knowledge. In addition, the Trust operates a register of Buildings At Risk (BAR), to which the condition of those buildings or structures is poor and gives concern is added. The BE-Register also provided an opportunity to update and register any changes to the BAR.

Accordingly, data is held relating to building condition within the new BE-Register, albeit that this data cannot fully be relied on as source of accurate information. It can, however, usefully be used to draw some of the following observations:

The majority of buildings and structures reported within the BE-Register (794 – 67%) are considered to be in Fair or Good condition, with 137 (11%) in Poor condition and 14 buildings assigned as a Building at Risk. 234 (20%) buildings do not currently have condition data available within the BE-Register. This compares to the current CPI reporting where 67% of buildings and structures are reported in Good or Fair condition and 33% reported in Poor condition, with a 52% survey gap.

The discrepancies between BE-Register and CPI reporting will have variable causes. Before making any observations, it must be noted that specific condition reporting is not the primary driver for the BE-Register. Estimates of condition have been made, and any discussion around condition must reference the CPI survey programme. NTS are making improvements to its Asset Management capability, and in time, it is expected that more accurate condition data from the survey programme will be reflected in the BE-Register providing an overview that aligns with CPI reporting.

Throughout the creation of the BE-Register, the NTS has had the opportunity to capture data for very minor buildings and ancillary structures (eg kennels/timber sheds etc). Many of these will not be critical to operations. This section of the portfolio has not necessarily been reported on via the KPI condition measurement previously. Adding this mass of data to the condition assessment in the Register, will undoubtedly have increased the good/fair overall condition percentage.

The importance of accurate condition reporting is worth reinforcing. What can be highlighted from the observations in the data sets is the importance of having professional condition survey information in order to accurately define the condition of the estate. Where the Trust have professional survey data, more structures are defined in poor condition, often highlighting the complex nature of historic and traditional buildings, in that defects are often uncovered as a result of professional investigation.

This investigation, and accuracy of reporting is ever more essential, as outcomes around estate condition (in relation to all asset types) are a key driver of investment, and activity, across the wider estate. The work in relation to the BE-Register, and the wider Portfolio Review, support data-informed decision making for the future.

If we acknowledge that condition analysis can be used to help support some more general observations of the Portfolio, one question that can be asked of the dataset is the extent to which use, particularly the leasing of a site, impacts condition.

The Trust has leased property throughout its history and analysis suggests that:

- *The pattern of condition of buildings that are leased and those that are managed directly by the Trust are very similar*
- *The high proportion of 'Buildings at Risk' in 'Other' is unsurprising as this category includes 'Buildings not in Use'<sup>16</sup>*

It is also of note that the charitable purposes of the Trust foreground preservation, so it is unsurprising that condition of structures is integral to Trust activity.

The purpose of the National Trust for Scotland should be threefold:

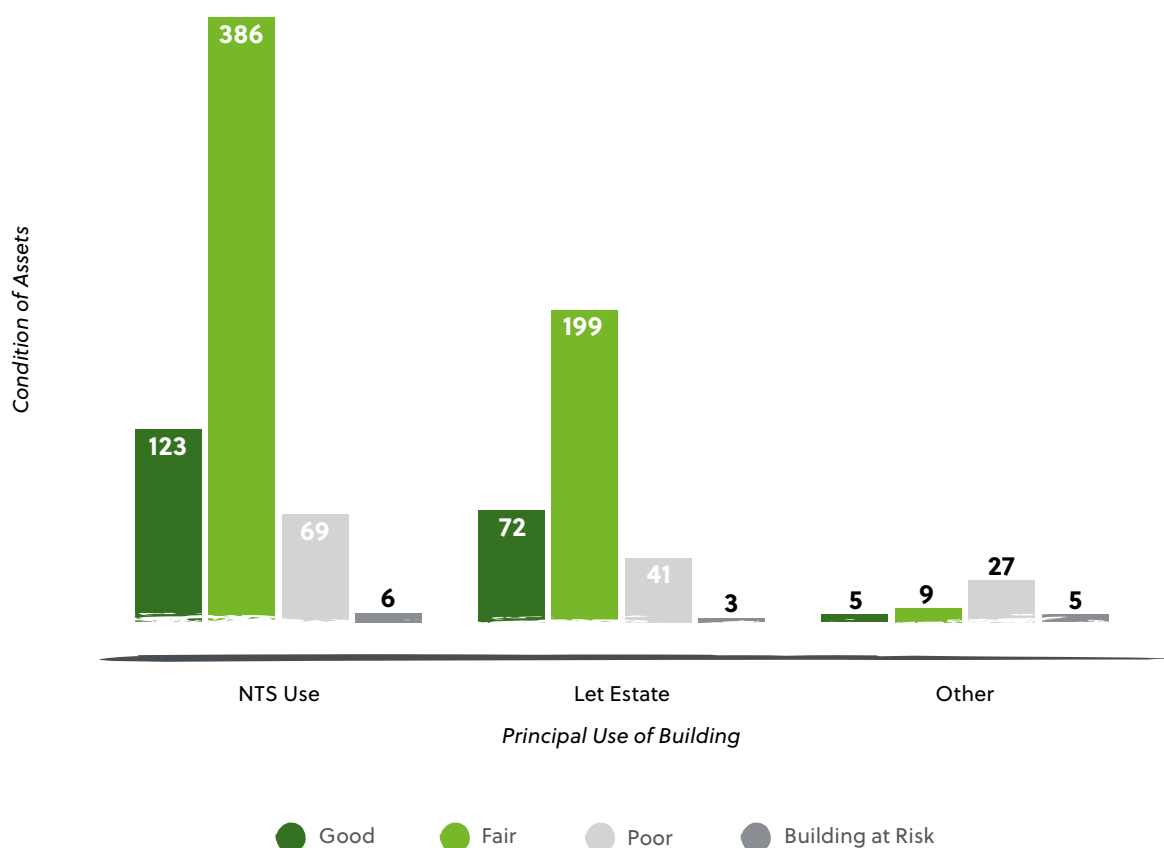
**A** 'The preservation of buildings of architectural or artistic interest and places of historic or national

*interest or natural beauty and the protection, improvement and augmentation of the amenities of such buildings and places and their surroundings*

**B** The preservation of articles and objects of any description having artistic or antiquarian interest

**C** The access to and enjoyment of such buildings, places, articles and objects by the public<sup>17</sup>

## Condition of Assets<sup>18</sup>



Built Assets noted if both Principal Use and Condition were assigned (944 assets in total).

## ENGAGEMENT: HOW ACCESSIBLE ARE THE TRUST'S BUILDINGS WHEN MAPPED AGAINST CENTRES OF POPULATION?

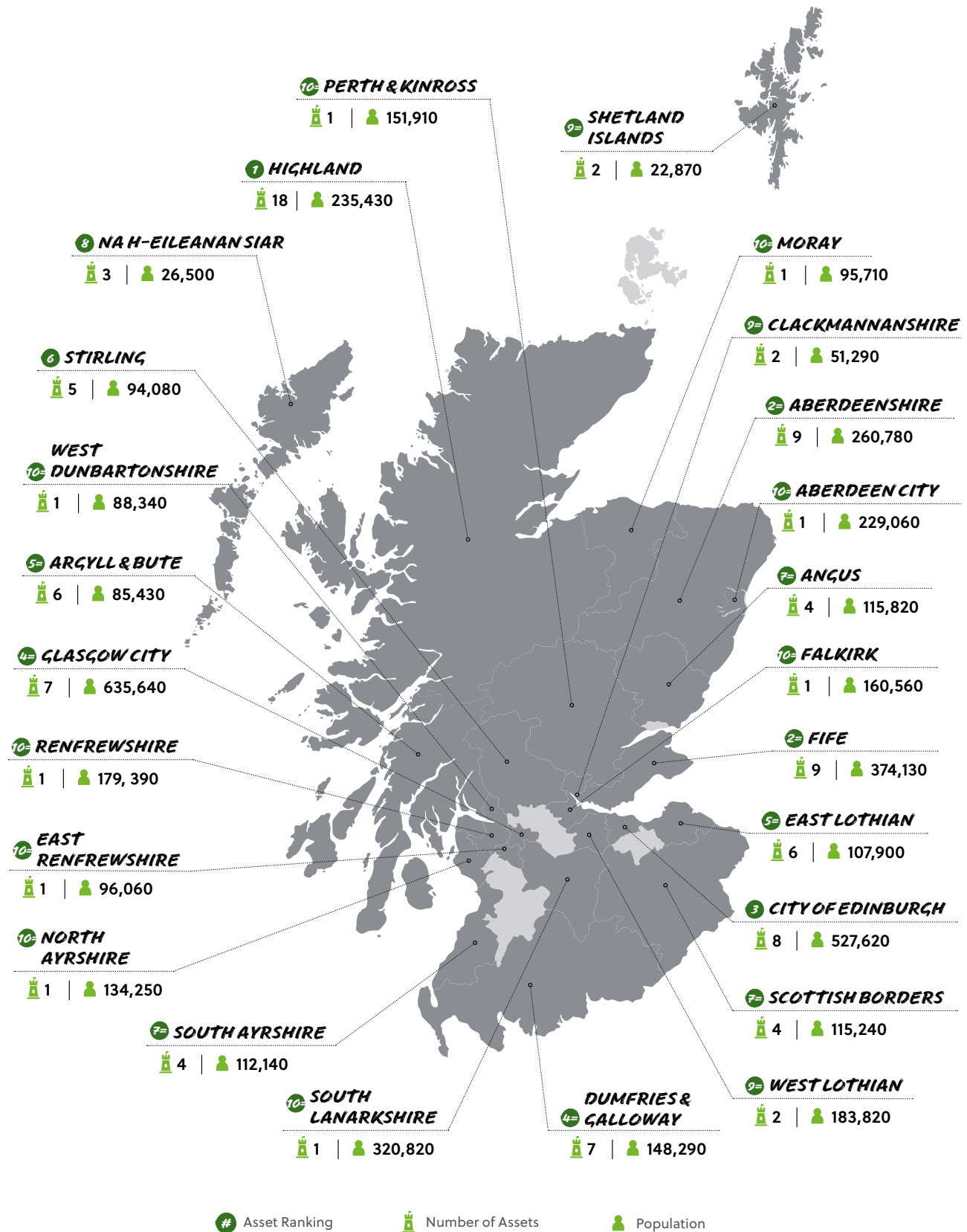
The accessibility of, and therefore the ability to engage with, Trust sites can also be considered in many ways. It is not appropriate for all Trust buildings to be accessible: many are leased or are used by the Trust for purposes which require limited access, either because of health and safety or to ensure the security of information and goods.

One form of analysis is to assess the geographic accessibility of buildings by examining their proximity

to population centres. Previously it was noted that Trust sites are far more likely to be in rural rather than urban areas.

More detailed analysis can break this down further. The visual below, maps in detail the population of Local Authorities against the number of principal built assets within the Trust's portfolio. It should be noted that the classification of principal built asset does include some sites that are part of the let estate and some sites which are under Guardianship Agreements.

## Principal Assets against Population



Population information is taken from Scottish Government, statistics.gov.scot, <https://statistics.gov.scot/atlas/resource?uri=http%3A%2F%2Fstatistics.gov.scot%2Fid%2Fstatistical-geography%2FS92000003&inactive=true> (Accessed 16.12.2022).

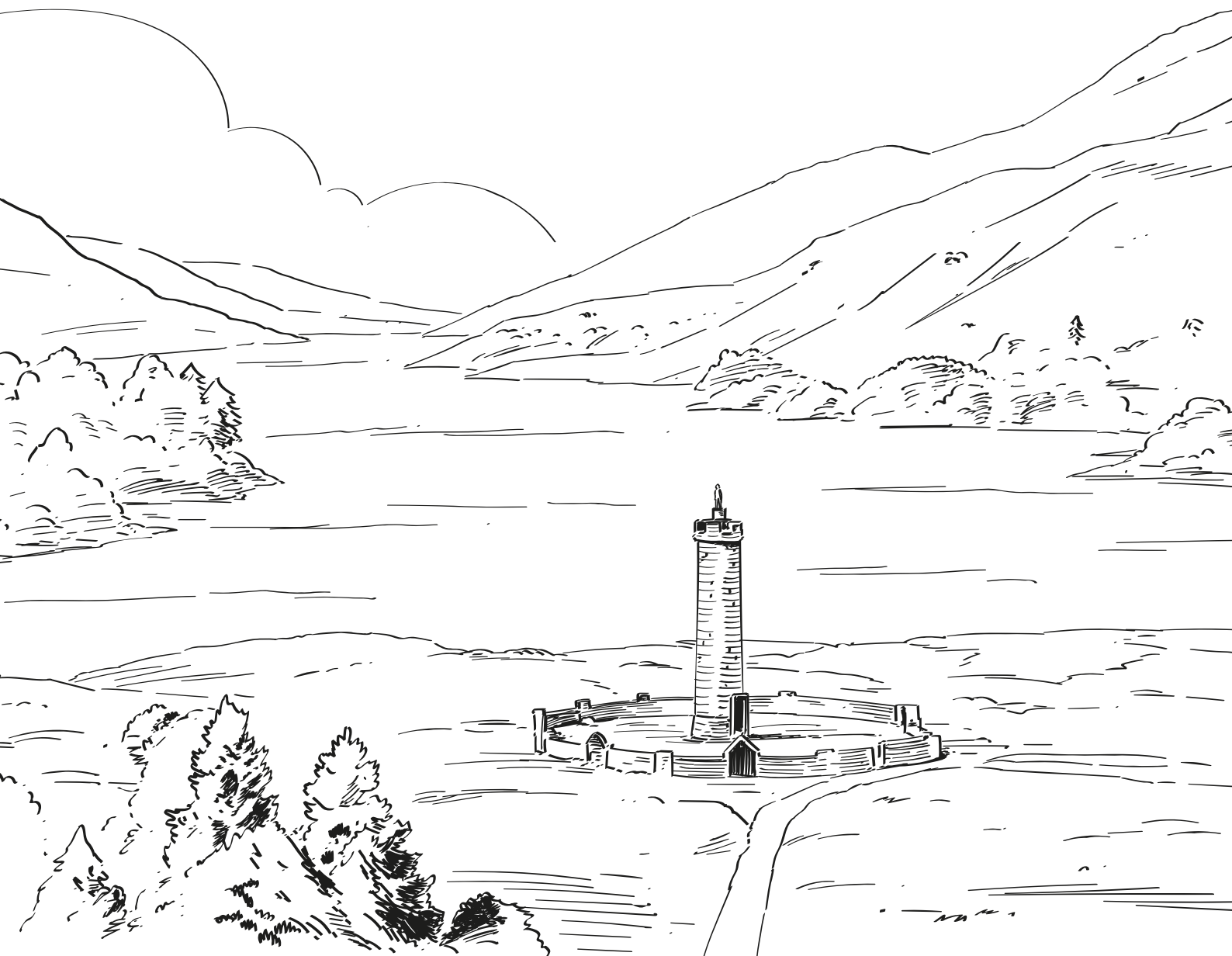


Headline observations include:

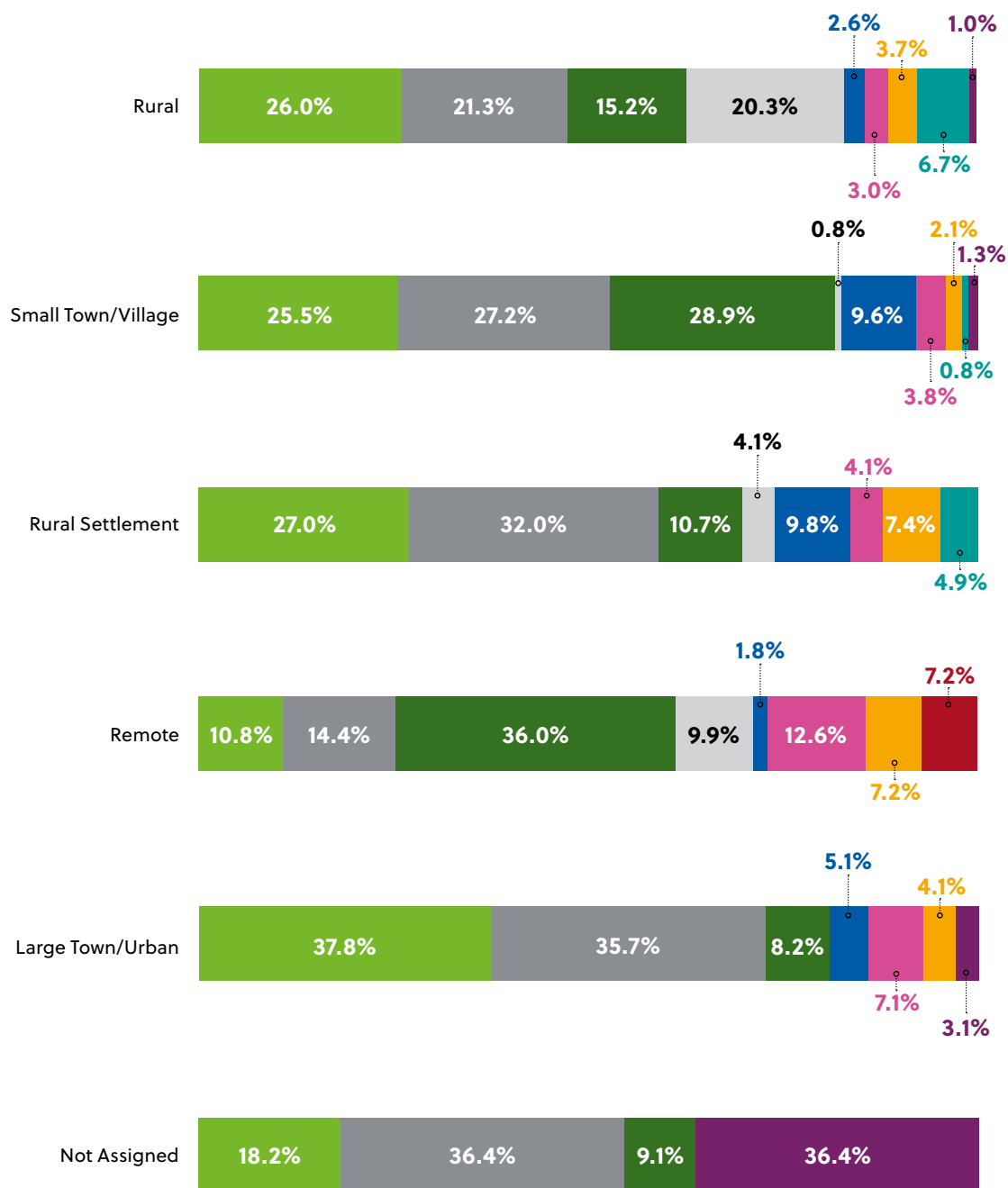
- *The 1st and 2nd most populous local authorities (Glasgow City and City of Edinburgh) do not have the largest number of principal built assets. However, they do have a relatively high proportion (3 and 4= respectively)*
- *The 4th most populous local authority (North Lanarkshire) contains no principal assets while the 5th and 8th most populous local authority (South Lanarkshire and Aberdeen City) contains only one principal asset.*

Looking at all of the Trust estate, buildings in an area can be focused around a relatively small number of sites. This is particularly true in the North-East region, where there are a number of large estates. Meanwhile, the high number of buildings in Dumfries and Galloway and the Highlands & Islands, are concentrated in relatively small geographic areas; and the Central Belt region, spread across a number of local authorities, has a sizeable number of small sites.

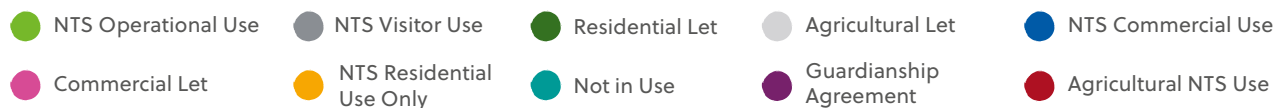
The majority of sites within Large Towns/ Urban areas are used for either visitor or operational use. While there are proportionately fewer sites in urban areas, these are more likely to be at sites which are accessible to the public.



## Principal Use of Asset against Location Type



Principal Use of Assets



Of course, proximity to population centres doesn't necessarily predict levels of visitation. The size of sites and the facilities they offer impact their appeal to visitors. The smaller sites in the Central Belt tend to have a more limited visitor offer and therefore draw a relatively small number of visitors than larger sites, even if they have a relatively large immediate population catchment; while sites with more facilities can encourage repeat or overseas visitors.

This is supported by the *Socio-Economic Impact Assessment* (2021) which has highlighted that Trust sites in remote areas have a disproportionate impact on their local economies. 46% of the Trust's direct employment at gated properties, for example, was calculated to occur within remote or accessible rural areas, while more than £14 million of the Trust's direct expenditure occurs within or supports remote or accessible rural areas.

Remote areas proportionately have the smallest number of built assets primarily used for visitor use when compared with other location types, but the built assets that are in use for visitors are more likely to provide a significant, large-scale visitor offer.

Headlines:

- *Not all Trust sites are, or can be, fully accessible to potential visitors*
- *The Trust's buildings are geographically dispersed across Scotland*
- *There are Local Authority areas that contain no Trust buildings although the majority, excepting the Orkney Islands, are located in close proximity to other Local Authorities that do have a Trust presence*
- *The proximity of Trust buildings near population centres should be set into the context of the disproportionate impact of Trust sites in remote rural and rural areas and the scale of visitor facilities that are provided at sites. Location alone cannot determine the value of a site and additional factors need to be captured to represent a holistic understanding of a site's importance.*

This analysis only starts this discussion and additional analysis could also look to use GIS to map properties against Government information, such as population centres, transport networks, Scottish Index of Multiple Deprivation data, or Travel to Work Areas, in the future.

## **HOW CAN THE BUILT ESTATE ASSET REGISTER HELP US SITUATE THE TRUST'S BUILT ESTATE WITHIN THE STORIES OF SCOTLAND'S PEOPLE AND PLACES?**

Information contained with the BE- Register can also be used to relate the Trust's portfolio to a national context. Buildings can be analysed, for example, by their principal date of construction or their Designation status. As we saw earlier in this paper, 43% of the Trust's buildings with a principal date recorded are from after 1900. This analysis challenges the assumption that the Trust holds little in its portfolio from the twentieth century.

The Built Estate Register collates a significant amount of information and allows questions to be asked that could not have been asked before. Bringing together data covering range, type, location, significance, condition and needs of the built portfolio estate, will always highlight gaps and further questions.

Analysis of condition, for example, was made by the assessor and represented their best understanding of the site at the time. There is some suggestion of regional variety which might in part, be impacted by the understanding of the assessor. This can be mitigated by providing checklists which ask specific yes/no style questions, rather than rely on assessment of condition as poor/fair/good. This approach is being rolled-out by the Church of Scotland General Trustees to get a better assessment of the condition of their estate.

The Built Estate Register and the Social and Economic Impact Assessment report, which drew on information linked to visitors, do not currently utilise the same regional terminology because they were working from different data sources and for different purposes and audiences. Ensuring alignment and agreement for future research and reporting will enable more accurate analysis for the future.

However, The Trust as an independent body has taken pains to align to national descriptors and can take further steps to align its internal data across geographical, economic and social descriptors for the data it holds. It is also vital that the BE- Register is maintained and updated to reflect any changes to, or reassessments of, buildings within the Portfolio.

The data in the Built Estate Register cannot be utilised entirely independently of other information held by the Trust. Analysing the physical location of a site, for example, while potentially offering considerations for the future portfolio, cannot on its own determine the 'value' of a site to the Trust.

A more holistic understanding (considering further cultural, social, economic, and environmental factors) of a site is needed in order to make this assessment and this discussion is highlighted within Values Framework and the Portfolio Review Report delivered as part of the BEFS-NTS partnership, scope of work.

Situating the Portfolio within a national context is also limited by the information that is available. There are avenues, particularly related to GIS datasets, that the Trust can pursue.<sup>19</sup> However, there are also significant gaps in broader sector knowledge which limit conclusions that can be made about the Trust's Portfolio. The Trust is, for example, able to map the age of many of its build assets across the country. However, while there is national headline information connected to historic buildings, such as that 19% of occupied dwellings in 2019 were constructed prior to 1919 (and were therefore considered historic),

more detailed datasets around specific age, type, material construction, and condition are not currently available.<sup>20</sup>

Depth of knowledge about existing buildings supports, for example, modelling around future materials and skills needs. As a significant holder of traditionally built and designated sites the Trust is well placed to add detailed knowledge of their own sites to national conversations, encouraging other asset holders to take a similar approach; and work in collaboration across the sector to support those coming needs.

Highlighting what data is not available nationally, only demonstrates the depth of knowledge the Trust currently has about its own estate. This knowledge will need to be unified, maintained, and preserved, with asset management systems, and digital preservation measures considered. Alignment to Scottish Government data sets has also been suggested for the future. This could go further than the Trust and connect with information from Historic Environment Scotland the National Archives of Scotland and the Registers of Scotland. Actions to this end could be a pivotal part of the next National Strategy for the Historic Environment which is about to be formed.

Taking a glance at other asset holders enables the scale of the Trust's entire portfolio to be seen within a wider context, the Trust being one of the few 'owners' to have significant holdings across an incredibly wide variety of asset types







Asset Type	NTS	HES	NatureScot	Scottish Wildlife Trust	Woodland Trust Scotland	Forestry and Land Scotland	RSPB Scotland	John Muir Trust	Local Authorities	Church of Scotland	Historic Houses [owned privately]	Private	Network Rail	Scottish Canals
Castles	●	●	◐								●	●		
Historic Houses	●	●							●	●	●	●		●
Gardens	●	[If linked to built site]							●		●	●		
Industrial Heritage	◐	●				◐						●		●
Historic Infrastructure (i.e. bridges)	[if connected to existing sites]	●		◐		●			●		●	●	●	●
Religious sites	◐	●							●	●		●		
Battlefields	●					●			●			●		
Memorials	●	[If linked to built site]				◐			●	●	●	●		
Sites of Special Scientific Interest (SSSI)	●		●	●	●	●	●	●			●	●	●	●
Special Areas of Conservation (SAC)	●		●	●	●	●	●	●			●	●		
Special Protection Areas (SPA)	●		●	●		●	●				●	●		
National Scenic Area (NSA)	●			●		●	●	●			●	●		
National Nature Reserve	●		●	●	●	●	●		●			●		
Local Nature Reserve (LNR)	●			●		●			●			●		
Scheduled Monuments	●	●	●	◐	●	●	●		●		●	●		
Ramsar	●			●		●	●					●		
World Heritage Sites	●	●		●					●				●	

● Present    ◐ Present but Limited

## 4. CONCLUSIONS

This significant body of work has added to the Trust's understanding of its portfolio. Specifically, it has shone a light on new observations that can be made of the built estate, and has given the opportunity to reinforce existing perceptions, namely;

- 1 There is no national 'database' providing the essential details (age, location, materials, condition) for Scotland's historic (pre1919) and existing buildings. These challenges have national consequences. The NTS now has a more comprehensive data set it can share with others.
- 2 The North-East regions contains the highest number of buildings (364 or 31%).
- 3 Nearly half of the Trust's built assets are classified as rural (45%) and are disproportionately located in rural areas and communities (70% in total), and are likely to reflect rural history and activities.
- 4 The Estate has a much higher percentage of buildings which can be principally dated to the eighteenth and nineteenth centuries (48%) and a much smaller percentage (1.7%) of pre-16th century buildings.
- 5 The majority of the Trust's seventeenth century properties are located in the Edinburgh & East Region, while the Highlands & Islands have a disproportionate number of properties which date to after 1900.
- 6 The majority (83%) of principal assets have some form of statutory designation – 55% are protected at the highest level as Category A listed buildings and 30% of the Trust's ancillary structures are also designated.
- 7 The Trust's designated built assets are more likely to be designated with the highest level of protection than the national average. Although patterns of designation do not map evenly across the country.
- 8 70% of the assets are classified as roofed and in use, 23% classified as a structure, 8% classified as vacant.
- 9 50% of the portfolio is used primarily as a visitor attraction or for supporting operations. The let estate including residential, agricultural and commercial leases account for 35% of structures.
- 10 The South & West region has a much higher proportion of agricultural lets when compared to other regions.

11 The 1st and 2nd most populous local authorities (Glasgow City and City of Edinburgh) do not have the largest number of principal built assets.

12 There are proportionately fewer sites in urban areas, although those that are more likely to be used by visitors than as let properties.

As a conservation charity, what the Trust holds, and how it is cared for and maintained, is a significant driver of economic investment within the Trust. The information on condition, age, and spread of location, further understood through this process supports future decision making around resources.

What the Trust holds is highly designated, signifying that a high cultural value has been attributed to many specific buildings and sites. This prominence may be of note when considering a national picture and advocating for significant sites within wider prioritisation discussions.

Whilst acquisition is limited by both availability and resource, the information within this report and the wider work of the Portfolio Review enables informed decisions to be taken around what stories of Scotland the Trust will tell next. Those stories may reflect places where rural communities once flourished; under-represented groups (women, minorities within Scotland); areas where socio-economic change has reshaped our places through heavy industry; or the 'new heritage' formed after World War II, and now left to tell the stories that fewer people remember.

All examinations of the BE-Register have been at either Trust Regional level, or national scale. There remains significant opportunity using this data, and other social and economic research completed by the Trust, to interrogate what we know about what matters to people at a local level.

Examining age, location and designation is the start of wider considerations that could site Trust properties as: National icons; sites of particular technological innovation; highlight individual and social connections with cultural movements or the arts; as well as explore the interaction of people with place – both what has been left 'wild' landscape and what has been formed as places of work, industry, and enjoyment, as well as homes. This, aligned to Portfolio gap-analysis developed from the Values Framework approach, enables the Trust to consider how it does, and how it wants to, tell more of the Stories of Scotland.

# REFERENCES

- 1 SHEA 2016 <https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=bac8296b-fcd4-4fdf-8617-ab9e009235db> : (Accessed 23/02/2022).
- 2 Built Estate Register, or the BE-Register, will be used as a reference to, *The Built Estate Asset Register*
- 3 At time of report production, March 2022.
- 4 This classification is based on standard HES/RCAHMS nomenclature and has been adopted as a standard classification set for Our Place In Time strategy. Four sites described as Principal have not yet been assigned an Asset Type.
- 5 64 ancillary sites do not have a built asset type complete.
- 6 A small number of buildings were not assigned a location type.
- 7 35% of entries for principal date of construction have been left blank. This often reflects the fact that data does not exist for this type of analysis and some structures, such as infrastructure, may be difficult to date and time consuming to assess.
- 8 SHEA 2016 <https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=bac8296b-fcd4-4fdf-8617-ab9e009235db> : (Accessed 23/02).
- 9 This figure reflects the current position. There will be variety of time due to the moving of tenancies and other operational changes.
- 10 A small number of buildings were not assigned a principal classification.
- 11 <https://www.historicenvironment.scot/media/4626/hes-baseline-condition.pdf> (2015) - Accessed 23/02/22
- 12 This analysis is focused on the identified principal use of the building. However, it is important to recognise that a building may be used for more than one activity: a shop might be contained within a castle, for example, or a holiday let within a mansion house.
- 13 Not all buildings were assigned a Principal Use
- 14 A Building At Risk being defined as Policy 2018; 1. Is vacant and has no identified use 2. Is in poor condition and suffering from poor maintenance 3. Is at risk of threat that will cause loss of fabric.
- 15 Natural, Gardens, Collections, Archaeology
- 16 Of the 46 built structures included within this category, 40 are classified as 'Buildings not in Use.' The remaining sites are the Guardianship Agreement sites for which a condition rating has been recorded. Buildings might not be in use for a wide variety of purposes, often linked to a change in use, although condition can also clearly play a role.
- 17 National Trust for Scotland Order Confirmation Act (1938) - available via: <https://www.nts.org.uk/our-people/trustees-and-governance/our-constitution> (Accessed 29/10/21).
- 18 Analysis only includes sites for which both Principal Use and Condition have been recorded - 944 sites in total.
- 19 Situating the location of assets alongside Scottish Government datasets relating to, for example, transport networks, Travel to Work Areas, or the Scottish Index of Multiple Deprivations. Historic Environment Scotland (HES) has also developed a GIS dataset mapping Designations across Scotland which can be used to situate the Trust's knowledge within the national context.
- 20 <https://www.gov.scot/publications/scottish-house-condition-survey-2019-key-findings/pages/4/> (Accessed 13/03/22).

*This report forms part of a suite of six documents relating to the Portfolio Review*

- **EXECUTIVE SUMMARY**
- **PORTFOLIO REVIEW: Insights, Values & Evaluation** – report
- **BUILT ESTATE ANALYSIS: Report**
- **INSIGHTS: Examining Trust portfolio Data**
- **INSIGHTS: Values Framework: applicability and operational potential** – including Toolkits
- **INSIGHTS: Built Estate Analysis & Framework applicability and learnings**

*All data and comments were formed in late 2021- early 2022. All data was checked, and any presentation of that data is done in good faith, and to the best available knowledge, as taken from a variety of sources as was available at the time. Further actions should be based on the data available at the time of decision making, referencing the sources presented here – and considering any new information which may be pertinent.*

*BEFS extends thanks to all those within the Trust who have enabled access to information and given of their time and expertise. Particular acknowledgement is due to Stuart Brooks and Bryan Dickson who enabled and drove this project. Thanks also to Kirsty Haslam, Research Manager within BEFS, for her work on this project.*

# APPENDIX

## PORTFOLIO REVIEW - UNDERSTANDING WHAT WE HAVE; BUILT ESTATE ASSET AND CLASSIFICATION REGISTER UPDATE

<b>Nature of Meeting:</b>	Executive Committee
<b>Date of Meeting:</b>	01 February 2022
<b>Name of Paper provider:</b>	Stuart Brooks, Head of Conservation & Policy
<b>Purpose of Paper:</b>	Decision & Discussion
<b>Time required for discussion:</b>	15 minutes
<b>Paper Classification:</b>	Confidential
<b>Any prior approval or comment from any other forum or committee:</b>	Executive Committee
<b>Approval required or Decision to be taken:</b>	No
<b>If yes, state details:</b>	For Information and to support recommendations
<b>Actions that will be taken if approval granted and by whom:</b>	
<b>Has a Risk Assessment been completed?</b>	N/A
<b>If no, why not?</b>	
<b>If yes, are details included within the paper?</b>	

### Executive summary

Good progress has been made with the development and population of a comprehensive Built Estate Asset and Classification Register. This effort has brought together a variety of data sources, populated missing data and has established a visualisation method in order to support more effective buildings management. It is an essential first step towards improving our Asset Management Systems.

This paper provides information on the process of gathering this data and its operational usability. A report on the observations of what the data tells us will follow.

### 1. Introduction and Background

This paper provides a summary of the work undertaken during 2021 in order that we better understand the Built Estate and should be read in the overall context of supporting the Portfolio Review, and in relation towards improving our Asset Management Systems.

In 2018 EXCO approved the 'Buildings Conservation Policy and a Framework for Improvement' (2018). Contained within this was the action of 'improving our classification and condition knowledge to present a national picture and help decision making' for the built estate. A follow up paper in 2019 assessed that building management data existed in various disparate data sources and proposed the creation of a single register of property information. Improving our condition knowledge has been previously reported on and is work in progress.

A consultant report 'NTS Built Estate Asset Register & Classification Report' (Dec 2021) is appended and should be read in conjunction with this paper. The following provides an overview of the actions we have taken towards improving our built estate data, and makes recommendations towards improved management.

Understanding what we own is an essential foundation for any Asset Management System. This register completes an important first step.



## 2. Creation of the Built Estate Asset and Classification Register

Following an initial Fife properties trial that concluded in March 2020, and with the appointment of consultants **Adams Napier Partnership**, combined with NTS building surveyor resource, we have now created a comprehensive register.

This register comprises 1192 entries collated onto an Excel spreadsheet. This information is categorized in a variety of ways to increase the Trust's understanding of the range, type, location, significance, condition and needs of the built portfolio estate.

The development of register has involved internal consultation with Buildings, Estates and others. External consultation has been mostly through Historic Environment Scotland who have in recent years, developed a bespoke Asset Management System and have usefully provided lessons learned during our processes.

The processes and definitions used to create the register are summarised in Adams Napier Partnership 'NTS Built Estate Asset Register & Classification Report' (Dec 2021) (appended)

This exercise has flagged several areas where improvements to data management can be made. Our consultants recommend the following;

1. *Establish corporate definition of what constitutes a 'structure'. If considering inclusion within a national perspective, this will require discussions with external stakeholders to ensure consistency.*
2. *Discussions should consider the most appropriate method of creating and ascribing unique asset codes and grid referencing for each 'structure'.*
3. *Establishing grid references will make the register transferable/compatible with a GIS enabled Asset Management System that likely the most appropriate tool to enable sustainable asset management for the NTS.*
4. *Gaps and inconsistencies still remain. Resource is required to identify missing assets and / or consistency of those already inputted. For example, ensure all bridges are included, and if other assets such as car parks and garden statuary are to be included.*
5. *Review the current categories and classifications and remove any repetition and/or classifications not required.*
6. *Engage with internal and external stakeholders for feedback to establish if other classifications are required and how best to develop future asset management that is compatible with other heritage bodies.*
7. *If 'class use', as defined under Town and Country Planning legislation, is needed as a classification within the asset register, additional resource will be required to ensure this information is accurately represented.*
8. *Consider how best to establish significance.*
9. *Review each category and where necessary update blank information. For example, principal dates and designation entries.*
10. *Further discussions with internal and external stakeholders to identify suitable software, especially if inclusion within a national perspective is considered desirable in future.*
11. *Consider additional resourcing to increase the range of Buildings Team classifications and information contained within the asset register. Access to, and analysis of maintenance registers, 10 year planning, survey information, drawings, photographs and project information could be used to aid future conservation performance indicators.*

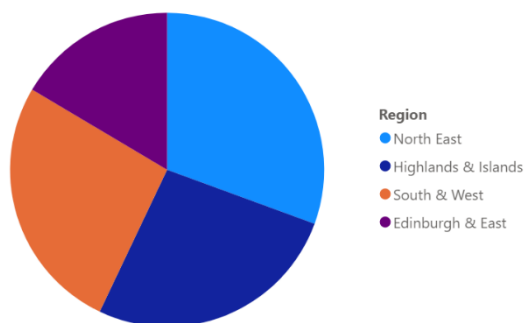
These recommendations for improvement will be considered across principally the Buildings, Estates and Heritage Planning functions to ensure alignment and avoid duplication of effort.

## 3. Presentation of the Register

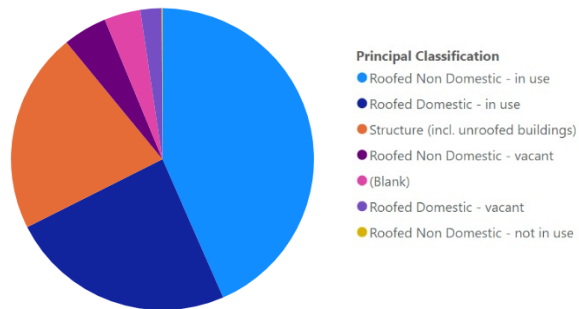
In addition, through Scottish Government Analytical Exchange Programme, the appointment of consultants **Accenture**, provided further recommendations to support the presentation and usability of this complex data set. They concluded with recommendations to use Microsoft Power BI to create an interactive dashboard and visualization tool.

Some typical extracts from the report are illustrated below, and a further report on the analysis of the data (ie what it tells us) will follow.

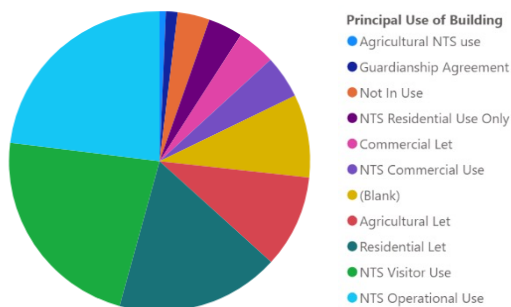
Built Assets by Region



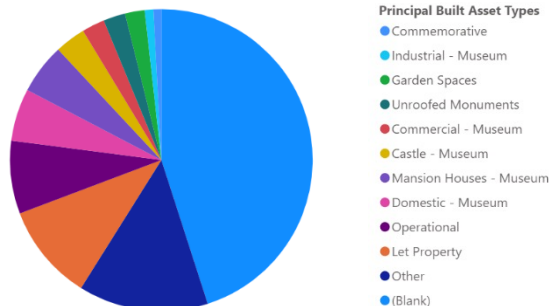
Built Assets by Principal Classification



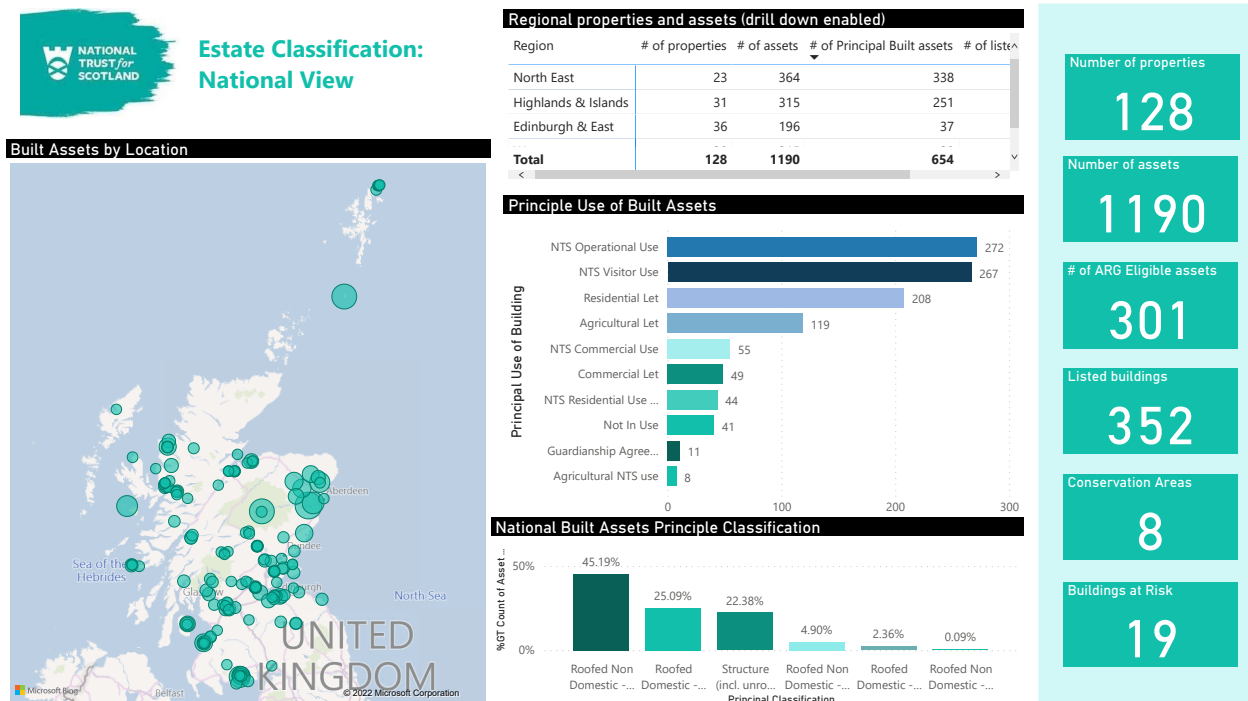
Built Assets by Principal Use of Building



Built Assets by Principal Built Asset Type



Extracts from 'NTS Built Estate Asset Register & Classification Report'



Example of Power BI dashboard; Estate Classification

#### 4. Outcomes from the Register

We now have a comprehensive data set which contains pertinent buildings management data in one place. This register currently has 1192 entries and can be used in a number of ways, these being principally;

- *Single asset building management; view data on a single building or asset*
- *Regional/national building management; arrange a dashboard of data to help understand a regional or national perspective*
- *Conservation Performance Index; arrange a dashboard of data to aid CPI reporting*

The register has been created to ensure maximum adaptability; the format will enable a GIS user interface to be developed or can be integrated into other NTS GIS initiatives. The format provides the primary foundation towards any future integrated Asset Management System.

This register can be adapted and adopted for other functional department needs. The addition of columns within the overall spreadsheet could provide a place for other key asset management information to support, for example, insurance management, natural heritage management and others. It is recognised that other departments use a variety of data sets to enable asset management (eg. Estateman), however a master excel with a GIS entry portal could provide a variety of users a useful management summary. This should be considered as NTS develop its Asset Management capability. Control of data and access to the single source of truth requires careful consideration and potentially dedicated resource.

As part of Scottish Government efforts to better understand our historic environment, via Our Place In Time strategy, we now have a comprehensive data set that can be shared with others. This has been designed in such a way to integrate within nationally recognised categories and will prove a valuable addition to this national effort.

#### 5. Conclusions and recommended actions

EXCO are asked to note the fact that we now have a comprehensive record of our built estate that will **significantly aid our buildings management**. This record has been collated in such a way that will allow for future adaptation and potential integration into different systems and should be seen as an essential foundation component for any developing Asset Management System.

EXCO are asked to note the several improvements and data management issues that **require resolution** and work has begun to develop this across principally the Buildings and Estates functions, to ensure alignment and avoid duplication of effort. (ACTION HEAD(S) OF BUILDINGS AND ESTATES Q1 2022 and ongoing)

As with any data gathering exercise **ongoing management** (cleansing, gap appraisals etc) of the data will be required to ensure accuracy – this will be undertaken initially by the Buildings Administrator. (ACTION HEAD(S) OF BUILDINGS Q2 2022)

EXCO are asked to **note** that through the Buildings Administrator, we **have the ability to create a dashboard of reports** that can provide information at a property, regional or national level. Awareness of this capability should be issued to regions and properties. (ACTION HEAD(S) OF BUILDINGS AND MLG)

It is **recommended that a data sharing forum** is established within relevant property management functional departments and regions with the aim to improve knowledge transfer and better manage a single source of truth. This should lead to the development of an integrated Asset Management System and requires dedicated resource (ACTION EXCO to consider









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## Built Estate Analysis