



Mertoun Estate Offices

10427-CSY-ZZ-ZZ-RP-A-3000 – Heritage & Design Statement

23/01/2024



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EXECUTIVE SUMMARY

0.0 Executive Summary

0.0 EXECUTIVE SUMMARY

Purpose

Mertoun House is a Grade A listed building, located within the Scottish Borders. The purpose of this document is to enable the council, relevant authorities and key stakeholders to understand the history and significance of Mertoun House and to identify where the significance of this heritage asset remains vulnerable in relation to proposed alterations to the Estate Offices as part of the listed structure.

The findings of this document will provide an objective framework to guide decisions on the future management of the building, from its use, repair and general maintenance.

Lastly, the document identifies opportunities for enhancement in the context of the proposed alterations to the building which are covered under a separate Heritage Impact Assessment. These alterations are based on the desire of the Mertoun Estate to enhance the operability of the Estate Offices to ensure the ongoing sustainable management of the estate.

History

Constructed in the early 18th century to designs by Sir William Bruce, Mertoun House is an outstanding example of early classical Scottish architecture that is further enhanced by its double pile plan. The house has been subject to significant alteration throughout its history, notably the addition of two wings and their subsequent dismantlement in the 1950's. The Estate Offices form part of the Edwardian phase of works, undertaken between 1913-16, and, as a consequence, are of lesser significance than the earlier works.

Significance

The Estate Offices form part of Mertoun House which is a Grade A listed building as set out in the Planning (Listed Buildings and Conservation Areas) (Scotland) Act 1997. Accordingly, it therefore embodies a range of values relating to historic, cultural, social and associational aspects of its past, present and potential future use.

1.0

INTRODUCTION

1.0 Introduction

1.1 BACKGROUND

Mertoun House is located near St Boswells, in the Scottish Borders council area. The house is an early-eighteenth-century mansion originally designed by Sir William Bruce, a pioneer of early Classical architecture in Scotland. The original structure has been subjected to three phases of substantial modification and renovation, the first undertaken by William Burn and David Bryce in 1843-1847; the second by Messrs Gibson and Gordon from 1913-1916; and the most recent by Ian Lindsay from 1953- 1956. Mertoun is listed by Historic Environment Scotland (HES) in Category A in recognition of its outstanding architectural and historical significance.

Following the Marquess of Stafford and his family taking up residence in Mertoun House, CSY Architects and their associated design team have been asked to consider the sensitive refurbishment and adaption of the Estate Offices, contained within the far Northern reaches of the house, to facilitate an increase in staff numbers and efficiently deal with the day to day running of Estate operations.

The specific purpose of this statement is to outline the house's historical development; to prepare indicative, historic phasing plans of the areas of the Estate Offices that will be subjected to most extensive change during the planned alterations; and to consider the heritage impacts of the alterations. It is designed to meet the requirements of a Design and Access Statement.

1.2 SCOPE OF THE STUDY

This Heritage and Design Statement has been prepared on behalf of our client and applicant, Mertoun Estate Farms Ltd, in December 2023. In outline, the purpose of this document is to enable our client, relevant authorities and key stakeholders to understand the history and significance of the building, to identify where the significance of this heritage asset remains vulnerable and to identify opportunities for enhancement within the context of a series of conservation policies.

This document will be appended to the Planning Statement as prepared by Ferguson Planning and will inform the Planning and Listed Building Consent applications for the adaption of the Mertoun House Estate Offices. It should be regarded as the Design and Access Statement.

It is intended that the latter part of this Statement will form the basis from which educated and justifiable interventions can be undertaken.

1.3 AUTHORSHIP AND ACKNOWLEDGEMENTS

The Statement has been authored by RIAS Accredited Conservation Architect, Fraser Bell, of Cameron Strachan Yuill (CSY) Architects. CSY Architects are indebted to the co-operation of the Mertoun Estate in the preparation of this document.

1.4 APPROACH AND METHODOLOGY

Heritage Statements are a critical tool in historic and building conservation. The Burra Charter (2013) defines conservation in the broadest sense as, "all the processes of looking after a place so as to retain its cultural significance".

Implicit in the term, 'conservation', is the acceptance of change and in their Historic Environment Policies for Scotland (HEPS), Historic Environment Scotland (HES) respectively note;

"HEP 01: Decisions affecting any part of the historic environment should be informed by an inclusive understanding of its breadth and cultural significance; and

HEP 02: Decisions affecting the historic environment should ensure that its understanding and enjoyment as well as its benefits are secured for present and future generations"

Furthermore, in their document, ' Conservation Principles, Policy and Guidance for the sustainable management of the historic environment' (2008), Historic England note the term 'conservation', reflects the management of change in a manner that retains and enhances the significance and special character of a place rather than seeking to prevent all change, unjustified preservation or the slavish subscription to restoration without appropriate consideration.

In preparing this Conservation Statement, Camerons Strachan Yuill Architects (CSY), has undertaken the following:

- Analysing the Site: Inspection of the site; compilation of photographic record; assessment and cataloguing of current physical condition, where possible; inspection of record drawings, photographs and written accounts.
- Assessment: Identifying primary significances and the risks and opportunities associated with these; presenting these in an understandable format.
- Consultation: Review meetings with the client and wider design team.

The content of this report is based on the following supporting documentation:

'Managing Change in the Historic Environment: Use and Adaption of Listed Buildings' (2019), Historic Environment Scotland
Burra Charter: The Australia ICOMOS Charter for Places of Cultural Significance (2013)
Guide to the Conservation of Historic Buildings (2019), Historic Environment Scotland
British Standard 7913:2013 'Guide to the Conservation of Historic Buildings'

1.5 LIMITATIONS

Access to The Estate Offices at Mertoun House was facilitated by the Mertoun Estate with all external inspections undertaken ground-based and visual only. No opening up was done to investigate a defect or look behind existing fabric and finishes. Research for the purposes of the Heritage Statement was limited only by time available for the project, given the large resource available in local and national archives. It is understood that extensive research will have to be undertaken in the future to understand all aspects of the building and clarify matters where the present report could not find definite answers in the short time frame. The level of information contained within this report is considered to be sufficient and appropriate for the present purpose, which is to support a Planning Application and Listed Building Consent.

1.6 ARCHIVES AND COLLECTIONS

This study is based on the primary sources for the architectural history of Mertoun available. The focus of the study has been to the Estate Office of Mertoun House and its immediate context, believed to have been constructed within the 1913-1916 phase, given this is where the focus of the proposed works are to take place.

It is noted that records of the 1913-16 alterations undertaken by Messrs Gibson and Gordon are primarily held within the private archive of the Mertoun Estate. For logistical reasons, it was not possible to gain access to these at the time of writing. However, The Lindsay office papers, which are now held by Historic Environment Scotland in the National Record of the Historic Environment; which include a full plan series for Lindsay's restoration of 1953-56, have been inspected and provide a valuable insight into the area of the house in question.

A Heritage Statement, authored by Simpson & Brown Architects, prepared as part of earlier applications for works to the main house has also been reviewed. It is the author's opinion that this offers a robust and thorough assessment of the history and phasing of Mertoun House and, as such, is a reliable source.

1.7 DEFINITIONS

The following terms will be used within the Statement:

- Replica: Architectural feature reconstructed from documentary or physical evidence to be as accurate as possible.
- Replacement/Reinstatement: Architectural feature replacing an original one at its exact position, but one which is not an accurate reconstruction.
- Insertion/Intervention: Newly inserted architectural feature that was not part of the original design scheme.
- Repair: Repair work to original architectural feature.
- Restoring: Completing the original that was partially lost.

All other definitions are according to "Guide to The principles of the conservation of historic buildings, BS 7913 : 1998, BSI.

1.0 Introduction



Fig. 01 Aerial view of Mertoun House and surrounding parkland. The Estate Offices form the outer extent of the overall structure to the North West

2.0

UNDERSTANDING OF PLACE

2.0 Understanding of Place

2.1 SOURCES

The primary source for understanding the history and development of Mertoun House is the physical fabric of the building itself, which has been subject to significant change throughout its life. In considering the significance of the building, examination has been made of freely available historical information including a review of historic maps, photographs and drawings that illustrate the building sequence and development of its surrounding context.

2.2 TOPOGRAPHY AND SETTING

Mertoun House lies 2 miles east of St Boswells in the Scottish Borders and occupies an outstanding situation on a high bank overlooking the River Tweed. The house is accessed from the B6404 via a private driveway through mature parkland.

Distinguished by its impressive architectural features of the 16th-18th centuries, Mertoun is also significant for the scenic value of its woodlands and its role in nature conservation. The Tweed, which flows through the centre of the designed landscape, is recognised as a Site of Special Scientific Interest and Special Area of Conservation on account of its ecological, conservation and habitat value.

Approach to the Estate Offices is via a winding driveway that passes a number of ancillary estate buildings and terminates at a gated entranceway which encloses a courtyard offering access into the Northern Wing of the main house. The entranceway is flanked by a rusticated, sandstone ashlar wall and piers with v-joints topped by two ball finials on stepped plinths. The courtyard is dominated by the 3 storey North elevation main house, with the lower ground floor projecting into the courtyard and enclosed by a shallow, mono-pitch zinc roof. The local topography slopes steeply down from the drive to the courtyard.

The Estate Offices form part of the eastern side of the courtyard. They are contained within a two-storey building with a piend roof. At ground floor level, the majority of the external walls are finished in a rusticated, pale red sandstone ashlar with v-joints with a continuous plat band delineating first floor level that ties into the coping of the gateway wall.. Above this, the sandstone ashlar plain is topped by a projecting cornice with top moulding cloaked in lead. It is believed that a lead valley gutter lies behind the parapet course with cast iron hopper and rhones present to the east and west facades.

Openings at ground floor demonstrate diamond headed voussoirs with projecting, moulded windows surrounds present around first floor windows. Further ornamentation is observed with rusticated smooth faced quoins. Windows are predominantly six over six sash and case painted timber with smaller windows four over two configuration.

The piend roof is finished in moderately gauged slate laid in diminishing courses with lead hip and ridge flashings. Three sandstone ashlar chimney stacks rise from the east, west and south roofs and are topped with stepped, stone chimney caps flashed in lead with bedded chimney pots, some of which are crown headed. Painted six panel timber doors are present to the north and west elevations with the front entrance to the west elevation via a set of external steps that drop in level by approximately 600mm.

This building is connected to the main house via a single-storey garage building of similar construction, which forms an infill between the Estate Offices and projecting lower ground floor with shallow, mono-pitch roof.

The Estate Offices are set back from the surrounding sloping hardstanding by a band of stone cobbles and kerbing which assists in the weathering of stonework to an extent and provides a clear delineation between the building and contemporary surfacing of the courtyard.

Internally, it is evident that the building has been subject to much alteration and retains a spare aesthetic with plastered reveals and no corning or panelling present. Remains of a terrazzo floor, barrel vaulted ceilings to the western side of the ground floor and the tiled walls of the former game larder are the only original interior details of note.



Fig. 01 West elevation of Estate Offices



Fig. 02 Approach to Estate Offices from the North

2.0 Understanding of Place

2.3 DESIGNATIONS AND POLICY

Listing is the process by which buildings of special architectural or historic interest are protected. The listing of buildings is undertaken by Historic Environment Scotland (HES). A listing applies to the whole of the building or structure named on the listing. Buildings are assigned to one of three categories depending upon their importance.

Those listed Category A, like Mertoun, are, according to HES:

"Buildings of national or international importance, either architectural or historic; or fine, little-altered examples of some particular period, style or building type. (about 8% of total listed buildings)."

Buildings are listed because they are considered to have special architectural or historic interest, as set out in the Planning (Listed Buildings and Conservation Areas) (Scotland) Act 1997. Listed buildings are provided with statutory protection through the planning system, to ensure that special character and interest are taken into account where changes are proposed.

The protection and enhancement of the historic environment is its fundamental basis. However, there is also a clear emphasis on enabling change that is sustainable. HES is a statutory consultee in applications for listed building consent for works on category A and B Listed buildings. It provides comment and recommendations on applications for changes to these buildings to Scottish Borders Council (SBC), and guidance on whether to grant or to refuse an application. HES routinely provides comments on applications for change to A-listed buildings, and their advice carries considerable weight with local authorities, being a material consideration at determination.

In 1987, the surrounding gardens were included in the Inventory of Gardens and Designed Landscapes in Scotland. There is a separate category A Listing for the Dove Cote / Doocot dated 1576, with a Listing reference of LB15112 and Category B for the old Mertoun House which is situated in the nearby walled garden, dated 1677, with a Listing reference LB15111.

Scottish Borders Local Development Plan (2016)

The LDP contains Policy EP7 which concerns listed buildings.

The policy notes,

"The Council will support development proposals that conserve, protect, and enhance the character, integrity and setting of Listed Buildings.

Internal or external alterations and extensions to Listed Buildings, or new developments within their curtilage, must meet the following criteria:

- a) be of the highest quality,*
- b) respect the original structure in terms of setting, scale, design and materials, whilst not inhibiting contemporary and/or innovative design;*
- c) maintain, and should preferably enhance, the special architectural or historic quality of the building; d) demonstrate an understanding of the building's significance."*

National Planning Framework 4 (NPF 4)

NPF4 recognises the importance of our historic environment in defining the character of our places, and in promoting a sense of belonging and cultural identity. The planning system should protect and enhance historic assets and places and recognise their cultural heritage benefits and social, environmental and economic value.

Policy 7 of NPF 4 stipulates,

"Development proposals for the reuse, alteration or extension of a listed building will only be supported where they will preserve its character, special architectural or historic interest and setting. Development proposals affecting the setting of a listed building should preserve its character, and its special architectural or historic interest."

Mertoun House has been subject to a number of planning and listed building consent applications as summarised below.

These relate to works within the main house rather than the Estate Office building.

21/00553/LBC – Internal alterations and reconfiguration relating to the Lower Ground Floor of the North West wing of the Main House with some external reinstatement to the North West elevation.

19/00956/FUL – Internal alterations to the Main House, focussed primarily to the top floor with the creation of additional bedrooms, involving the restructuring of the roof to create a lead flat roofed area and additional dormers.

19/00953/LBC – LBC relating to planning application 19/00956/FUL.

21/01847/LBC – Minor internal alterations to the Main House first floor.

20/00598/LBC - Minor internal alterations to the Main House first floor.

2.0 Understanding of Place

2.4 HISTORICAL OVERVIEW

For the purposes of this statement, the main objective of this section is to focus on the building now containing the Estate Offices which are the subject of proposed alterations.

However, for contextual purposes, an abridged historical overview of Mertoun House has been provided below. A detailed which forms the basis for supporting documentation for previous applications noted in 2.3.

Phase I: Sir William Bruce

Mertoun House was commissioned by William Scott of Harden, following the purchase of the wider estate in 1680. The structural shell of the building appears to have been finished around 1707 with the earliest known representation of the house illustrated in plate 142 of William Adam's *Vitruvius Scoticus*, published in 1808-1810.

Much of Mertoun House's significance is founded upon its architect, Sir William Bruce (1630-1710), who remains a figure of outstanding significance in Scottish architectural history as an advocate and pioneer of the Classical style. Appointed as the Master of King's Works in 1671, Bruce's prolific career would include the rebuilding of the Palace of Holyroodhouse and Hopetoun House as well as many other notable projects such as the Merchants' Exchange in Edinburgh and Stirling Tolbooth.

Bruce's design for Mertoun House is generated from a rectangular double-pile plan with a central spine corridor. This plan-form was certainly unusual at the time, with the U- and H-plan houses deriving from Elizabethan and Jacobean approaches to planning remaining common at this time. The houses' aesthetic is defined by a restrained but accurate Italianate classical detailing with a heavy cornice and projecting pediment and a steeply pitched hipped roof with a central leaded flat, surmounted by tall chimneys.

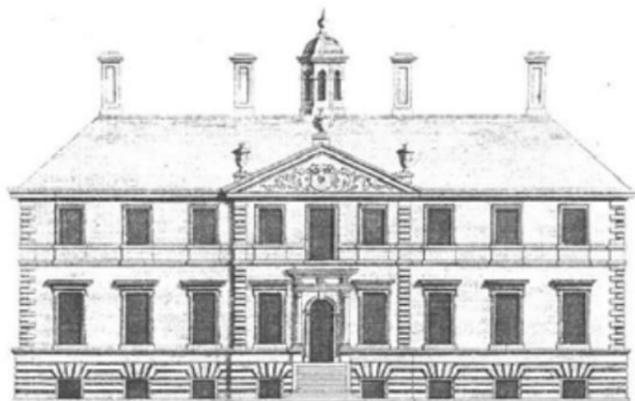


Fig. 04 Extract from *Vitruvius Scoticus* Plate 142 – Front Elevation
CSYARCHITECTS.COM

Very little is known about the original décor given the house underwent three periods of extensive reconstruction and renovation in 1843-7, 1913-16, and 1953-6, with the result that few if any original fittings remain in situ.

The external appearance of the house, however, appears to have remained largely unchanged throughout the eighteenth and early nineteenth centuries, as documented by a watercolour of 1796 from Lord Polwarth's collection. This shows the arrangement of the roof with tall, narrow chimneystacks symmetrically arranged as per the *Vitruvius Scoticus* plate.



Fig. 05 Detail from watercolour, 1796, illustrating Mertoun House

Phase II: The Burn and Bryce Additions and Alterations (1843-47)

The first major alterations to the house were commissioned by Henry Francis Hepburne-Scott, 7th Lord Polwarth, between 1843 and 1847, and undertaken by the prominent architects, William Burn and David Bryce, synonymous with Scottish country house design and alteration from that period. Burn would leave the practice in 1844 to set up on his own in London, with Bryce becoming synonymous with the popularisation of the Scotch Baronial style in much of his country house work. Interestingly, Mertoun House follows a similar path to nearby Thirlestane Castle, also originally designed by Sir William Bruce prior to being modified and altered by Burn and Bryce.

In summary, there were two main aspects to Burn and Bryce's works: the first was the addition of a substantial new wing to the east of, and directly adjoining, the existing mansion house with the second a series of alterations and renovations to the existing house.

The new wing was the most significant part of the project, expanding considerably the existing suite of reception rooms and the amount of private accommodation with the exterior constructed in a restrained neoclassical style, exhibiting the combination of high aesthetic quality and stylistic conservatism typical of Burn and Bryce's work.

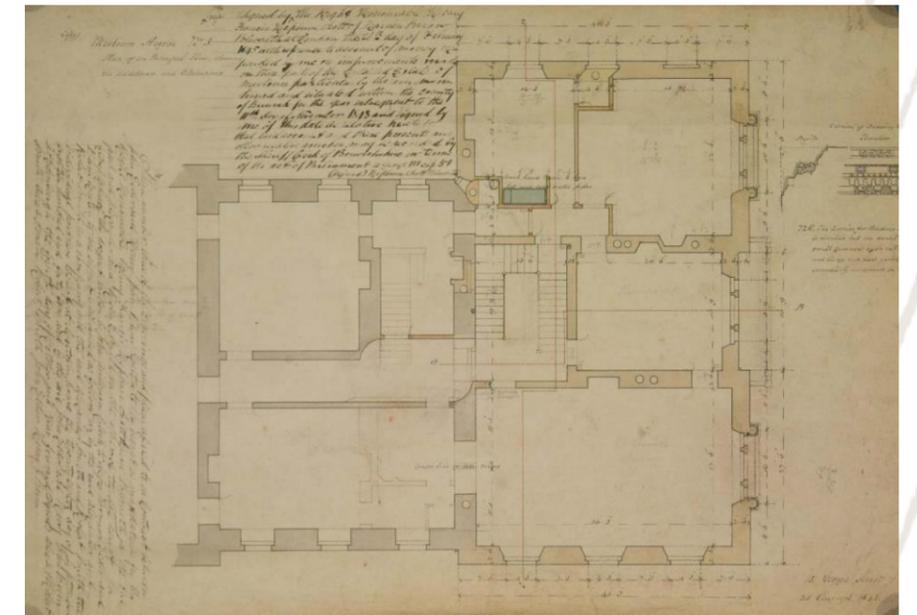


Fig. 06 Principal Floor Proposed Plan illustrating addition of new wing, 1843, Burn and Bryce

A further phase of works involved extensive remodelling to the roof of the Main House to provide servants' accommodation within the roof-space. The designs of this element of work were subject to much revision, both in the design and construction phases, with the resulting pitch and form similar to that of Bruce's original intentions contained within the *Vitruvius Scoticus* plate.

2.0 Understanding of Place

2.4 HISTORICAL OVERVIEW



Fig. 07 The entrance front of Mertoun House, 1912, illustrating the addition of the new wing.

Phase III: Messrs Gibson and Gordon (1913-16)

The Scott family continued to own Mertoun until the trustee on the estate offered it for sale by auction in 1912. It was bought by Lord Brackley, the eldest son of the 3rd Earl of Ellesmere, who commissioned extensive enlargements and modifications to the house in 1913-16 by Messrs Gibson and Gordon. The most significant element of the project consisted of the addition of a further substantial wing to the north west, mirroring the footprint and external appearance of the Burn-Bryce wing to the south east, but built one-storey higher, thereby justifying the raising of the Burn Bryce wing to match and restoring symmetry to the front elevation and principal aspect.

Assessment of proposed plans indicate that it was during this phase that the Estate Offices, in their current location, were constructed. Photographic evidence and analysis of the 1912 sales brochure, suggests the presence of ancillary buildings to the north west prior to the construction of the Estate Offices.

The 1912 sales brochure notes,

“Stabling: For seventeen horses, two coach houses, harness room, coachman’s house, groom’s room, lofts etc.”

Fig. 08 confirms the presence of an ancillary building, likely single storey with loft and gabled end, adjacent to the location of the new wing. It could therefore be surmised that the new Estate Offices were constructed adjacent or in place of an existing stable block that housed the accommodation as described in the sales brochure,



Fig. 08 Enabling works as part of the 1913-16 works prior to the removal of the lateral wall to form the new wing

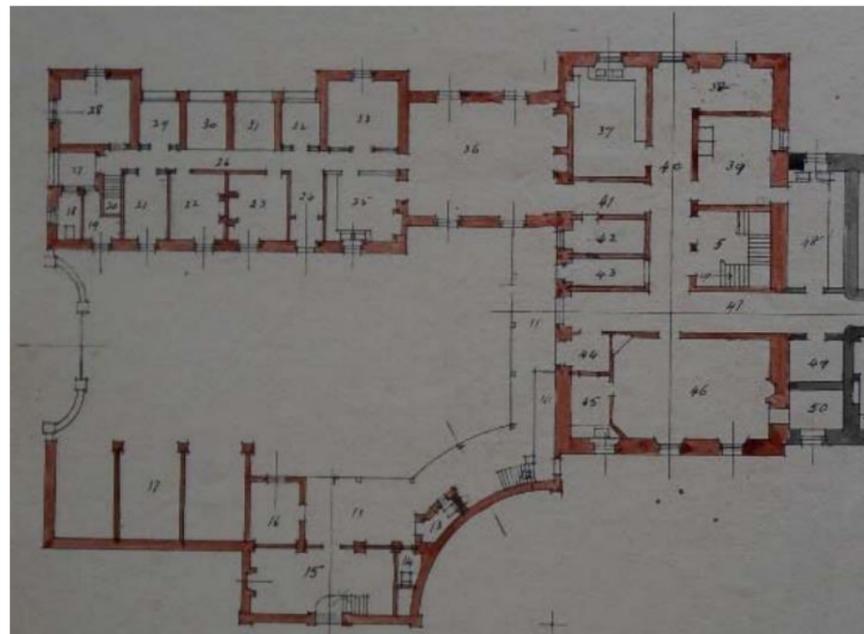


Fig. 09 Proposed Ground Floor Plan indicating the new wing and services court of which the Estate Offices form part of. (1913)

Because the new wing occupied much of the area where the offices formerly stood, it was necessary to construct a new service court and offices extending to the north west beyond the new wing.

This wing opened off the basement rooms of the main house, which housed a china room, still room, pram room and servants’ hall. As well as a large new kitchen and scullery, the wing included a sequence of store rooms and larders, and, on the floor above, bedrooms for female servants.

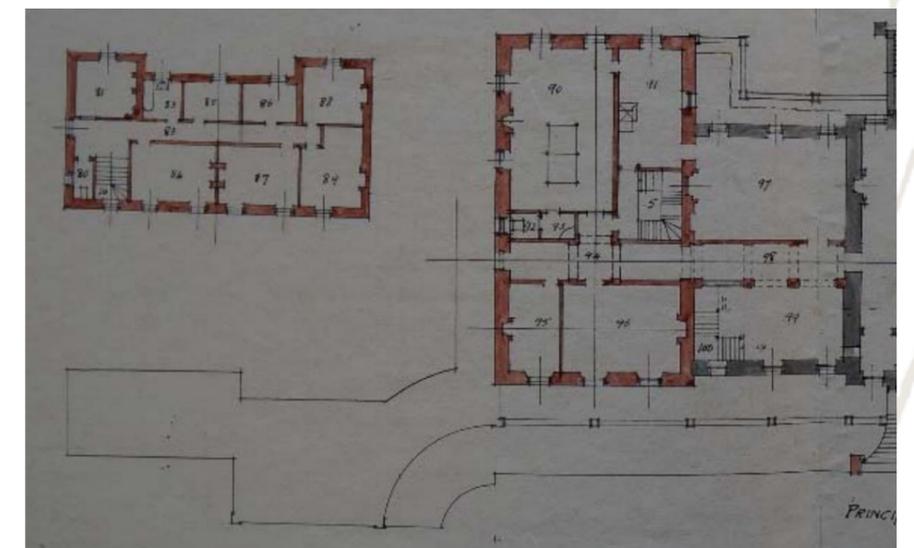


Fig. 10 Proposed First Floor Plan indicating the new wing and services court of which the Estate Offices form part of. (1913)

The proposed plans illustrated in Figures 9 and 10 represent what we understand to be the current Estate offices. Considering this building in isolation, the Ground Floor plan indicates a covered entranceway to the northern elevation with stepped access. A central spine corridor provides access to a series of ancillary rooms, some containing fire places suggesting these were intended for inhabitation.

A modest stair allows access to First Floor level with the plan form repeated, indicating habitable rooms with fireplaces accessed from a central spine corridor.

2.0 Understanding of Place

2.4 HISTORICAL OVERVIEW

The most significant structural intervention, according to historic record was the replacement by specialist contractor Diespecker of almost all the house's timber floors with their patent hollow-cast terracotta and reinforced concrete flooring system, apparently to ensure that the finished house should be as fireproof as possible.

No investigative works have been undertaken, to date, therefore educated assumptions have been made about the existing construction, based on historic research, observation and the author's experience of similar construction within this period.

It is believed that the external walls are constructed in 9" brickwork bonded directly to the ashlar facing, with potential for intermediary through stones or ties. Intermediary floors are potentially hollow core terracotta concrete or with steel filler joists with terrazzo cast directly on top or timber floor boards fixed onto battens with fly ash deafening. Slates are fixed directly to the sarking boards with penny gaps in the traditional manner with the ground floor comprised of an early form concrete slab.

Phase IV: Ian Gordon Lindsay (1953-56)

By the early 1950's, the extensive additions made in the previous phases had greatly increased the size of Mertoun House to the extent that it was believed to be financially unsustainable. Accordingly, Scotland's foremost conservation architect of the time, Ian Lindsay, was appointed to reduce the house to a more manageable size.

Lindsay's proposals went through a number of iterations, prior to settling on the removal of both wings. At basement level, significant internal alterations were undertaken to the north west wing, with further alterations undertaken throughout. External alterations include large new chimney stacks over the centres of the exterior walls at each end of the house with extensive prescriptions for reusing stonework from the demolished wings for the new lateral facades

Despite extensive alterations within the Main House, Lindsay's plans, as per Fig. 11, note that no alterations were proposed to the Estate Offices, with works to the surrounding service courtyard involving the construction of a single-storey porch containing a bathroom and storage with the adjacent stable block converted into a garage as illustrated in Fig. 12. Notes detailing the blocking up of existing doorway access from the Estate Office into the garage building can be observed to the left hand edge of the image.

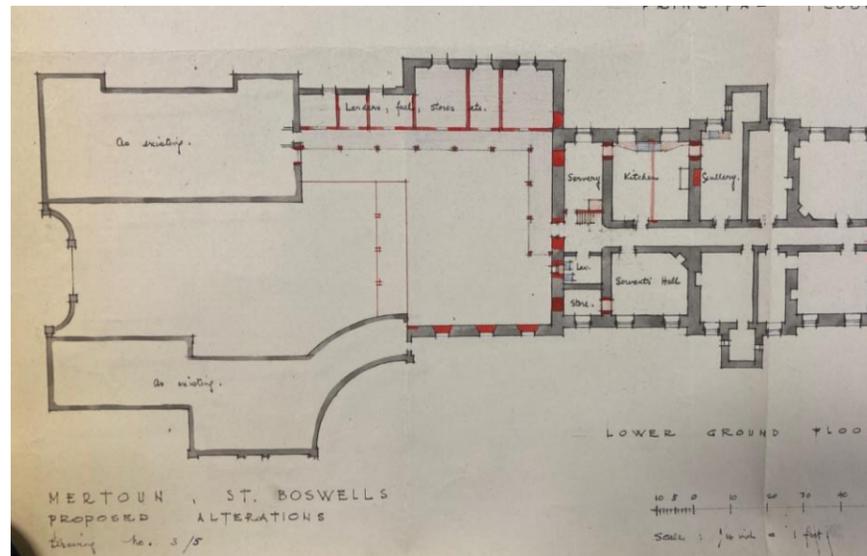


Fig. 11 Lindsay's initial proposed alterations to the lower ground floor, 1950

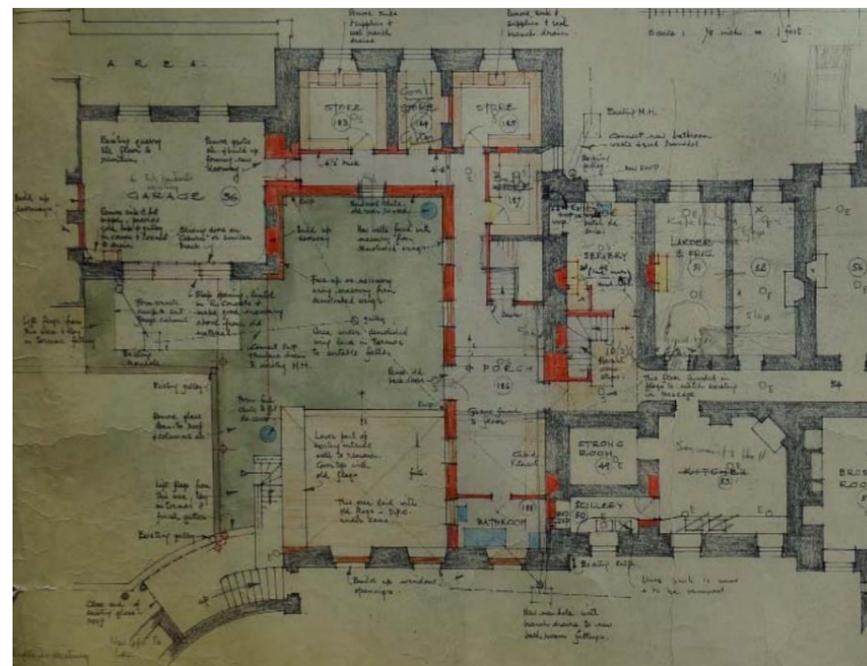


Fig. 12 Lindsay's actual proposed alterations to the lower ground floor, 1953

Phase V: External Fabric Repairs (1989)

By the late 1980's, some of the external stonework to the house was exhibiting signs of deterioration from water ingress to the extent that a programme of works was implemented to replace stonework, primarily focussed to the wallheads at the cornice and pediment. New felt coverings were also applied to the guttering and flat roof within the light well with walkway tiles applied to the roofs to avoid mechanical and sun damage.

Summary

The apparently coherent exterior of Mertoun House belies the underlying complexity of its evolution as a series of phased interventions, some significant, resulting in little of Bruce's original fabric being retained.

As an outlier to the Main House, though forming part of its overall massing and form, the Estate Offices were created as part of the Gibson and Gordon 1913-16 extensive phase of works and are therefore relatively unaffected by both the significance of Bruce's original intentions as illustrated in the Vitruvius Scoticus and the later Ian Lindsay reductive scheme.

However, it should be noted that the existing layout differs somewhat from the original drawings submitted by Gibson and Gordon, with some alterations of a relatively contemporary nature whilst others appear to be of an earlier era.

These interventions and the phasing of the works are discussed in further detail in section 2.5.

2.0 Understanding of Place

2.5 PHASING

For the purposes of clarity, the phasing and assessment of historic interventions is focussed on the Estate Offices building and its immediate environs.

Visual assessment of the Estate Offices confirms the historic record that these are part of the 1913-16 phase of works to Mertoun House, with many details atypical of Edwardian construction. These include the presence of terrazzo flooring and 9" brick internal lining to the external ashlar. Subject to confirmation through testing, the mortar within the brickwork appears to be an early form patent cement rather than lime based, typically found in buildings of this period. Furthermore, astragals to the single-glazed external windows are thicker and of a simpler profile than those typically found in earlier period buildings.

Analysis of the proposed ground floor drawing by Gibson and Gordon reveals the intention to create a covered entranceway within the north-west gable, facing the primary approach to the service courtyard, accessed via external steps with external access to what appears to be a WC and store room.

The current composition of this gable does not however reflect this arrangement. An external panelled door is set within the gable wall, which is accessed via a set of external steps with evidence of stone cobbles, now partly subsumed by modern tarmac. The diamond head voussoirs above this door and the adjacent external door, accessing the game larder, appear contemporary with the original stonework and bear no signs of alteration. Furthermore, the bottom row of panels of the six panel external doors appear disproportionate to those above, suggesting that these have been altered at some stage. This is reinforced by the formation of a partial, suspended timber floor forming a landing behind the gable door into the ground floor corridor, which sits above the quarry tiled flooring and from which the uneven bottom riser of the internal stair can be seen to be disappearing below. All of these elements suggest that internal and external levels have been adjusted following the construction of the Estate Offices, partly due to the challenging topography, with the original intended gable entrance potentially simplified prior to construction. See Figure 13.

At present, the primary entrance to the Estate Offices is via the west elevation. Originally designed as a window within the original plans, this appears to have been subject to later adaption to form the entranceway, with stepped access flanked by balusters and coping and a projecting, flat headed bay finished in v-jointed rusticated ashlar to match the existing walling. This is illustrated in Fig. 14.

No specific logic has been found for these suspected reconfigurations other than the current entrance to the Estate Offices lies behind the secure line of the gated access, which may have proven more favourable from an operational perspective. Analysis of aerial photography from 1995 confirms these alterations had already been undertaken.



Fig. 13 External door to north west gable illustrating diamond head voussoirs, cobbles and adjustment to lower door panels.



Fig. 14 External entranceway to west elevation of Estate Offices



Fig. 15 External steps to gable entrance

2.0 Understanding of Place

2.5 PHASING

Figure 15 illustrates both the extents of the Estate Offices Ground Floor to be reconfigured, with the adjacent area currently forming part of the cook's apartment, and subsequent alterations to that of the 1913-16 phase of works.

The original plan form comprising a central corridor with ancillary rooms to either side has been somewhat compromised with various openings made within the internal walls to reconfigure the spaces to suit the operations of the Estate.

A partial suspended floor has been formed within the hallway to allow occasional direct access from the north west gable door. The formation of the current primary entrance to the west elevation, through adaption of an existing window, is also apparent.



Fig. 15 Ground Floor Plan illustrating Phasing

2.0 Understanding of Place

2.5 PHASING

Figure 16 illustrates both the extents of the Estate Offices First Floor to be reconfigured, with the adjacent area currently forming part of the cook's apartment, and subsequent alterations to that of the 1913-16 phase of works.

This area was used as the butler's apartment for residential purposes, though is currently unoccupied.

The original plan form comprising a central corridor with ancillary rooms to either side is, for the large part, retained. A new internal wall has been constructed within the corridor to separate the Estate Offices from the cook's apartment whilst an enclosure has been formed around the original stair. The stair itself, whilst shown in its original location as per the Gordon and Gibson drawings, has been subject to adaption with alterations to balusters and other elements comprising its evidential significance somewhat.

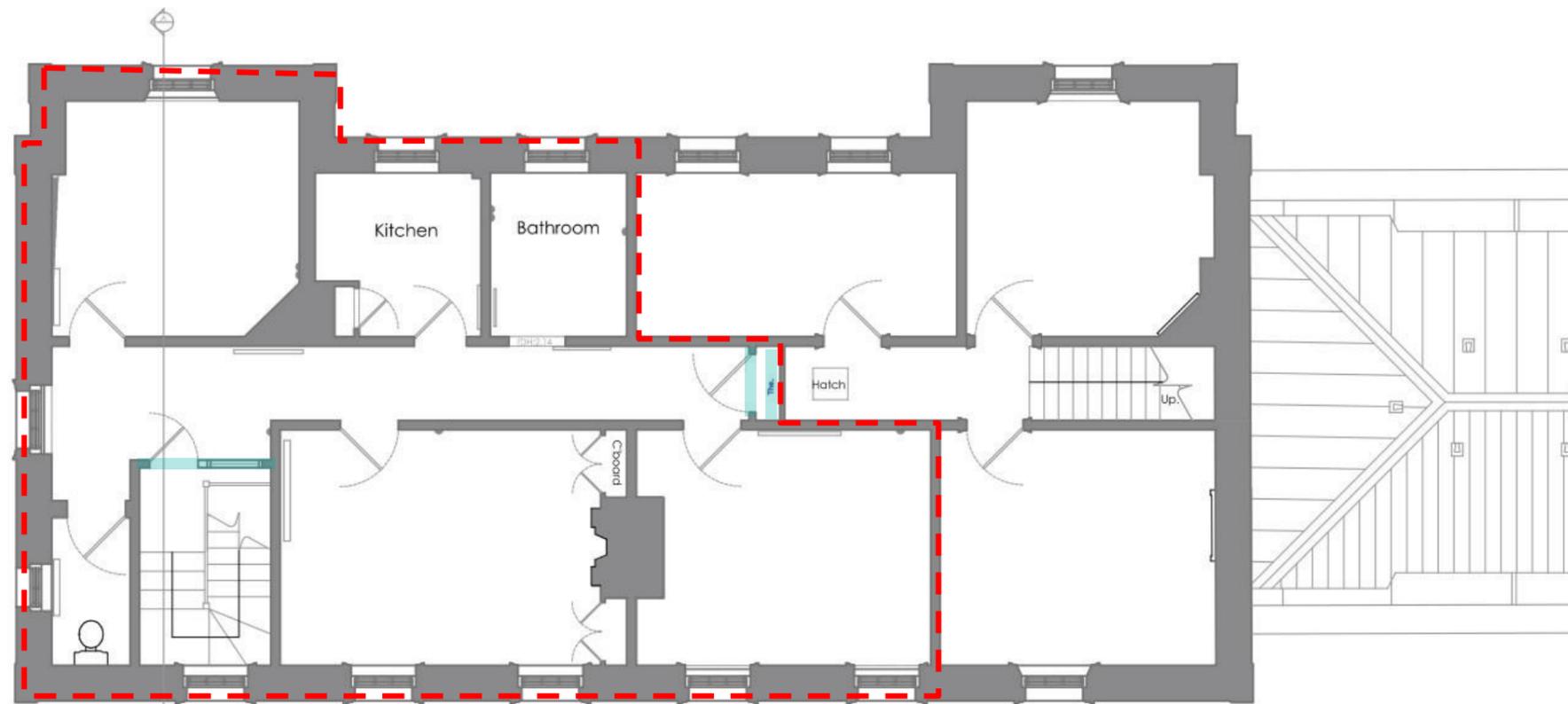


Fig. 16 First Floor Plan illustrating Phasing



2.0 Understanding of Place

2.6 ACCESS

Whilst Mertoun House gardens are open to the public between April and September, the house is retained as a private dwelling with no public access.

The Estate Office offices are accessible to members of the public on the basis they have business with the Estate. Typically, this includes those visiting the estate for sport or tradespersons, employees and professionals attending for business purposes.

Parking for estate vehicles and members of the public attending on business is available directly North of the Estate Offices. All entrances to the Estate Office building are via stepped access, with the level difference approximately 650mm in places, making level access difficult without significant intervention that would impact upon the exterior setting of the heritage asset.

No public transport is available to Mertoun House with access available only via private vehicle.

2.7 GAPS IN KNOWLEDGE

As an element of arguably less significance, information relating to the Estate Offices is somewhat less detailed than records held of the Main House.

Historic photographic evidence is extensive and surviving architectural drawings are available to an extent. It is noted that records of the 1913-16 alterations undertaken by Messrs Gibson and Gordon, of which the Estate Offices form part of, are primarily held within the private archive of the Mertoun Estate. For logistical reasons, it was not possible to gain access to these at the time of writing.

Furthermore, it is clear that alterations to the Estate Offices have been undertaken since its completion in 1916, but there remains no written record of these in any publicly available archive that we can source. However, discussion with the Marquess of Stafford has confirmed that the current arrangement has been implemented for over 50 years. While the detailed on-site survey and careful investigation uncovered much information some information remains unclear without further invasive means of investigation, such as the construction of the existing floors.

2.8 CONDITION

Overall, the Estate Offices have been well maintained as part of the overall Main House, with little or no evidence of deterioration in either the external or internal fabric.

Evidence of hygroscopic salts and moisture ingress was observed, in isolated locations, to the base of the walls in the ground floor where they abut the external hardstanding as well as minor water ingress at ceiling level. However, this is not a cause for concern given the works planned.



Fig. 17 Aerial image illustrating relationship of Estate Offices to Main House, 1995

3.0

APPROACH TO SIGNIFICANCE

3.0 Approach to Significance

3.1 APPROACH TO SIGNIFICANCE

The basis of protection for places of cultural heritage significance is understanding their unique identity, expressed as a collection of values that can be enshrined by a place – in other words, what is important, and what aspects of the asset contribute to that importance.

Mertoun House embodies a range of values relating to historic, cultural, social and associational aspects of its past, present and potential future use. An overview of these helps define what makes the place special, and is therefore essential to making informed decisions about future levels of intervention, management and interpretation.

The following assessment of significance acknowledges that understanding both the tangible and intangible significances of a historic setting enables effective decision making about its future. The principles state that sustainable management of a heritage asset must begin with gaining an understanding of its cultural heritage values, and then by setting out its significance, in order to guide appropriate conservation decision making which seeks to sustain those values.

Furthermore, The ICOMOS Charter for the Conservation of Places of Cultural Significance (1988, also known as The Burra Charter), lays down the principles for assessing cultural significance, defined as *“the aesthetic historic, scientific or social values for past, present and future generations.”*

A ‘statement of significance’ of a place or building should be a summary of the cultural and natural heritage values currently attached to it and how they interrelate, which distils the particular character of the place. It should explain the relative importance of the heritage values of the place (where appropriate, by reference to criteria for statutory designation), how they relate to its physical fabric, the extent of any uncertainty about its values (particularly in relation to potential for hidden or buried elements), and identify any tensions between potentially conflicting values. So far as possible, it should be agreed by all who have an interest in the place. The result should guide all decisions about material change to a significant place.

Note that the following Summary Statement of Significance is likely to change with time, as new information becomes available. For the purposes of clarity, a Summary Statement of Significance is provided in relation to Mertoun House as a whole, with a further focus on the Estate Offices.

3.2 ASSESSMENT OF CULTURAL VALUES

BS Standard 7913 identifies four categories of primary values, paraphrased as follows:

- 1. Evidential value:** An element of an historic asset that provides evidence about past human activity, including standing structures that are easily visible, as well as those that may be hidden below ground or under water. This aspect of value is strongly related to physical remains, but may also include documentary sources, pictorial records and artefacts.
- 2. Historical value:** These aspects of significance are often less tangible than physical evidence, including associations with notable people, or historical events or developments. They often connect past people, events and aspects of life with the present, and are likely to have changed with time of shifting perspectives. Historical values are less vulnerable to change than evidential values.
- 3. Aesthetic value:** This is derived from the way in which people draw sensory and intellectual stimulation from an historic asset, including its appearance and how it lies within its setting. As such, this aspect of value is more subjective than the preceding classifications, being particularly sensitive to change over time and subject to fluctuations depending on many factors.
- 4. Socio-Communal value:** This element of value derives from the meanings an historic asset holds for those who relate to it, or for whom it forms part of a collective experience, or memory. This may include emotional links, and aspects of the site that people can relate to their collective history and heritage. It is important to remember that not all aspects of communal value are positive and can often relate to uncomfortable experiences and events. Aspects of social value are included in this category. Communal value will change over time.



Fig. 18 Image illustrating dismantlement of south east wing, 1952.



Fig. 19 Image illustrating completed scheme by Ian Lindsay, 1954.

3.0 Approach to Significance

3.3 SUMMARY STATEMENT OF SIGNIFICANCE OF MERTOUN HOUSE

As a summary, the following statement is intended to cover the wider context of Mertoun House as a whole. It must be remembered that even though the Estate Offices are of potentially lesser significance, they are still part of the overall historic fabric of Mertoun House and thus should be considered in detail.

- Mertoun House is outstanding as a major, early example of country house by Sir William Bruce; it is especially significant because of its use of the innovative double-pile plan that he pioneered in Scotland, with a pared back Classical aesthetic. On this basis, the core of the house and associated historic fabric is of outstanding evidential significance. These are limited to the entrance and garden facades, and the layout of some of the main internal walls.
- The later works by Burn and Bryce, Gibson and Gordon, and Lindsay, though of note in their own right, have been found to be of moderate significance and consequently do not merit the same level of care and protection as the surviving original fabric. The nature of each respective proposal has seen much removal of the previous phase, making archaeological assessment of the evidential fabric difficult.
- Lindsay's 1950's re-working and reduction of the wings to reflect Bruce's original intention is regarded as a skilled re-working in conservation practice of the time, balancing a desire to do justice to the history of the house with the practical considerations of upgrading the property to meet contemporary living requirements of the time.
- There is a thread of strong historical significance running through the various phases of Mertoun House in relation to the status and prominence of the architects who undertook the works.
- Mertoun House retains a strong association with the wider social and historical landscape of the Scottish Borders through its links with the Scott family.
- Despite its multiple phases of alteration, Mertoun House retains a high aesthetic significance. Lindsay's work to remove the wings of previous phases restores much of the proportional qualities of Bruce's original design, primarily the restructuring of the roof and restoration of the pedimented frontage as the dominant feature in terms of visual hierarchy.
- There is moderate socio-communal significance to Mertoun House. What there is, is limited to the household and estate staff, and the family themselves. Mertoun and its role as a local employer allow it to figure in collective memory and experience, and so be a source of communal identity. The mansion and wider estate will also figure in collective experience for the local Scottish Borders community, for whom the estate has a high profile, and which the gardens remain open to the public.

3.4 DISCUSSION OF PRIMARY SIGNIFICANCES OF THE ESTATE OFFICES

Evidential Significance

Evidential value is proportionate to its potential to contribute to the ability of people to understand the past. The ability to understand and interpret the evidence tends to be diminished in proportion to the extent of its removal or replacement. It goes without saying, therefore, that the removal/ demolition of any elements potentially reduces the evidential significance.

Constructed as part of the 1913-16 phase by Messrs Gordon and Gibson, the Estate Offices are a relatively new component of the overall historic structure of Mertoun House, which dates from around 1707.

Subject to considered, investigative works, it is believed that the Estate Offices are constructed using atypical Edwardian techniques popular at the time, with solid masonry walls comprised of dressed ashlar and bonded brick backing, concrete intermediate floors and a cut timber roof with slates nailed directly to the sarking boards.

Phasing analysis indicates that the building housing the Estate Offices has undergone much alteration to its original, internal fabric and, potentially, may have been constructed differently from the original design drawings when considering the gable entrance door.

However, the evidential value of the Estate Offices remains moderate. Surviving architectural drawings support our understanding of the physical fabric, and the archive of historic information, including photographs, provides a sound base on which to make a range of conservation decisions. All such evidence serves to enrich our collective understanding of how people have used the building. This database allows us to understand the genesis of the building through the main stages of evolution and significant re-modelling.

Externally, the suspected alterations to accommodate the primary entrance to the western façade, within the service courtyard, do not detract from the overall evidential significance of the building, with little other alteration observed other than adjustment to some external doors due to topography.

Internally, the building has evolved to meet the changing demands of the Estate. Staff accommodation has vastly reduced, with the building split into a cook's apartment and the Estate Offices. At Ground floor, internal walls have been removed further openings made with replacement sections evident within the original stair. As would be expected of a building designed to house staff and ancillary rooms, there is no ornate detailing such as corncicing or panelling. Some internal features of note do remain, primarily the remains of the Diespecker terrazzo floor and barrel vaulted ceilings within rear ground floor rooms as well as Edwardian filing in specific locations.

In summary, the Estate Offices remain of moderate evidential significance, which is somewhat compromised due to a partial loss of plan form.

Historical Significance

Constructed between 1913-16, the Estate Offices are of relatively low historical significance. Whilst they remain associated with the earlier works of Sir William Bruce through their overall encompassment in the Grade A structure, the architects responsible for their design and construction are relatively unknown in comparison.

Aesthetic Significance

The aesthetic significance of the Estate Office is moderate. While it cannot be claimed to be an architectural masterpiece, the building presents pleasant and well-proportioned facades addressing both its approach from the north and facing into the service courtyard.

These encompass diamond headed voussoirs with well executed, rusticated v-jointing across the ground floor with polished ashlar at first floor. Depth is provided in the classical manner with the incorporation of a continuous plat band at first floor level and moulded cornice with rusticated quoins to the corners.

Finished in a matching pale red sandstone with fine jointing, the overall impression is that of a composed building that matches much of the detailing of the Main House but is subservient in its scale and pared back ornamentation.

Internally, there is little of note in terms of historic aesthetic of note, as would be expected in a building originally intended for staff and ancillary use. However, the terrazzo floors and tiled walls are of interest.

Socio-Communal Significance

It could be argued that the Estate Offices are of moderate socio-communal significance.

Their initial construction in the early 20th century was representative of the expanding operations of the Estate and associated increase in staff, somewhat emblematic of the changing social and economic conditions that working estates across Scotland and the UK faced in the early 20th century prior to the punitive tax regime of the post-war years.

The presence of the Estates Office is an essential cog in the day to day management of the estate and is, more often than not, the first point of interaction many members of the public, in a professional capacity or otherwise, have with Mertoun.

On this basis, the Estates Office plays an important role in how the Estate interacts with the wider community of the Scottish Borders and its ongoing ability to operate in this capacity is crucial for the successful future of Mertoun.

3.0 Approach to Significance

3.5 RELATIVE SIGNIFICANCE

Where changes to the fabric of a historic setting are planned, the potential impact of that change on its significance should be identified and quantified. The impacts from change can either be direct (i.e. affecting the fabric or character), or indirect, (i.e. altering spatial qualities or relationships within its setting). Change that protects or reveals the significance should be encouraged, whilst change that has the potential to be detrimental to the significance should be avoided where possible. This will assist in the future conservation and management of the asset to protect and enhance the significance. A guide to the grading levels is outlined below;

- **Exceptional Significance:** A space or element of the site, which is of great importance, and is integral to the overall significance and character of the place. Layout and original fabric are intact, and the space or element is a strong example of a particular period or style. Any significant alteration, deterioration or demolition would be a great loss to local, regional and national heritage and would greatly diminish the overall heritage value of the asset.
- **Considerable Significance:** A space or element of the site, which makes an important contribution to the significance and character of the overall place; generally of a regional importance. Layout and original fabric are substantially intact, and the space or element is a good example of a particular period or style.
- **Moderate Significance:** A space or element of the place which contributes to the overall significance of the building but is not a key component.
- **Neutral Significance:** A space or element which neither contributes, nor detracts from the significance of the place.
- **Negative:** A space or element which detracts from the significance of the place.

The elements or spaces have been subsequently graded according to their sensitivity to change, as outlined below;

- **Very High:** Even minimal change or alteration has the potential to negatively impact upon the significance of the building.
- **High:** Some small degree of change or alteration is possible, without having negative impact upon overall significance.
- **Moderate:** A reasonable degree of change is possible.
- **Low:** The space is not of special importance and a considerable degree of change is possible.

3.6 THREATS TO SIGNIFICANCE

There are currently a number of issues which threaten the significance of the heritage asset.

- **Estate Operations:** It is anticipated that the expansion of operations within the Mertoun Estate will bring specific pressure to ensure that the Estate Offices are capable of housing additional staff and accommodating suitable office accommodation. The core of successful conservation is the management of change in a sustainable manner to pass on cultural value to future generations and, in this regard, good conservation practice comes from an open, flexible and forward-looking approach, based on an informed understanding of the building and wider context. It is abundantly clear that the successful future of the Estate Offices as a base of operations and, by association, the wider Mertoun Estate, will require a degree of flexibility and innovation in order to balance both its ability to operate efficiently without affecting its significance as a heritage asset.
- **Climate Change:** Our historic environment is on the front line of climate change. We need to take significant and urgent global climate action to protect our past for the future. The need for climate action has never been clearer. We are in a climate emergency and our historic environment is already feeling the impacts. The historic buildings in which we live, work, learn and socialise are also under pressure. We must all make radical changes in response. Though the Estate Offices of Mertoun House are well maintained, consideration may have to be given in the future to addressing issues such as managing increased rainfall and/ or improving the thermal performance of the building without impacting upon its evidential and aesthetic significance.
- **Access:** Whilst this is a Grade A Listed building and need not conform to the current disability access requirements, the existing topography around the Estate Offices makes it difficult to envisage how level access could be provided without compromising the setting of the heritage asset. A level difference of 650mm between internal floor and external ground level would see a significant ramp and/ or platform lift installation. Several historic alterations have been made internally in an attempt to offset the level difference however these, for the most part, are incongruous and present trip hazards.

4.0

HERITAGE IMPACT ASSESSMENT

4.0 Heritage Impact Assessment

4.1 INTRODUCTION

As stated by BS 7913, The purpose of heritage impact assessments (HIAs) is to gain an understanding of the effect of development and changes on the historic asset, and how the impact of change might be mitigated.

HIA's can be carried out at various levels of scale and complexity, from the effects of building works on a small structure to the effects of major development in a world heritage site.

HIA's should identify the significance of the element concerned on the relative scale of values, the nature of the proposed change, an assessment of whether the change needs to be mitigated and, if so, how this can be achieved. The mitigation measures should be justified on the basis of the heritage asset's significance.

4.2 OVERVIEW

The proposals are based on the need of Mertoun Estate to expand, enhance and future proof its current Estate Offices on the basis of an increase in estate operations and subsequent need for additional staff.

The alterations are almost exclusively internal and are broadly comprised of the removal of some internal walls, stair and sections of floor and construction of new internal walls, stair and associated fixtures and fittings. Furthermore, the first floor area, currently serving as residential use, will be absorbed into the overall Estate Offices as part of the expansion.

A design philosophy has been developed that offers a useful summary into the context and conservation-led philosophy behind the proposals. This philosophy identifies the following over-arching objectives that form the driver for intervention within the heritage asset:

1. To safeguard the significance of the building and its setting from future decay by ensuring an ongoing viable, permanent use within the context of the wider estate.
2. To retain the special character of the building within its setting.
3. To preserve the character and authenticity of Mertoun House based on the compatibility of the brief with the building's heritage.
4. An exemplary approach to environmental sustainability whilst taking cognisance of the particular requirements historic buildings require in relation to breathability.

To follow is a detailed critical analysis of the proposed changes to the building in the form of an assessment of each individual intervention.

The purpose of this analysis is to manage the change methodology as advocated within BS 7913 and Historic Environment Scotland's, Managing Change in the Historic Environment Guidance Notes.

Each analysis will be undertaken as follows:

Proposal: A brief description of proposal together with an assessment to establish whether there is enough information to comprehensively understand the impact of the proposals on the character and historic significance of the building.

Impact: Consideration of the effects of the proposal on the authenticity and integrity of the heritage values attributed to the building.

Reversibility: Whilst the quality of the architecture and intended specification is intended to last the test of time, this is not always a given. Should the proposal not perform as expected, consideration is given to the ease of reversibility so as not to prejudice alternative, future solutions.

Mitigation: Consideration of the necessary actions to mitigate the impact of loss of any element of historic significance resulting from the proposals, such as recording or archiving.

Compensation: Consideration of any consequential conservation-based benefits resulting from the proposal.

Outcome: Evaluation of the anticipated outcome of the proposal given the information available.

4.0 Heritage Impact Assessment

4.3 OVERVIEW OF INTERVENTIONS

The proposed interventions are driven by a desire to upgrade the existing Estate Offices to a contemporary standard and spatial requirement that reflects the expanding operations of the Mertoun Estate. Whilst the core function of the building will remain unchanged, the proposals are intended to both provide an improved experience for public visitors and also the working environment for current and future staff employed by the estate.

The interventions are broadly comprised of the following:

A./ Removal of the existing stair and formation of a new stairwell, including new internal walls.

B./ Removal of partial suspended floor and internal screens from hallway and office areas.

C./ Works to former game larder, including new slapping and reduction in floor level.

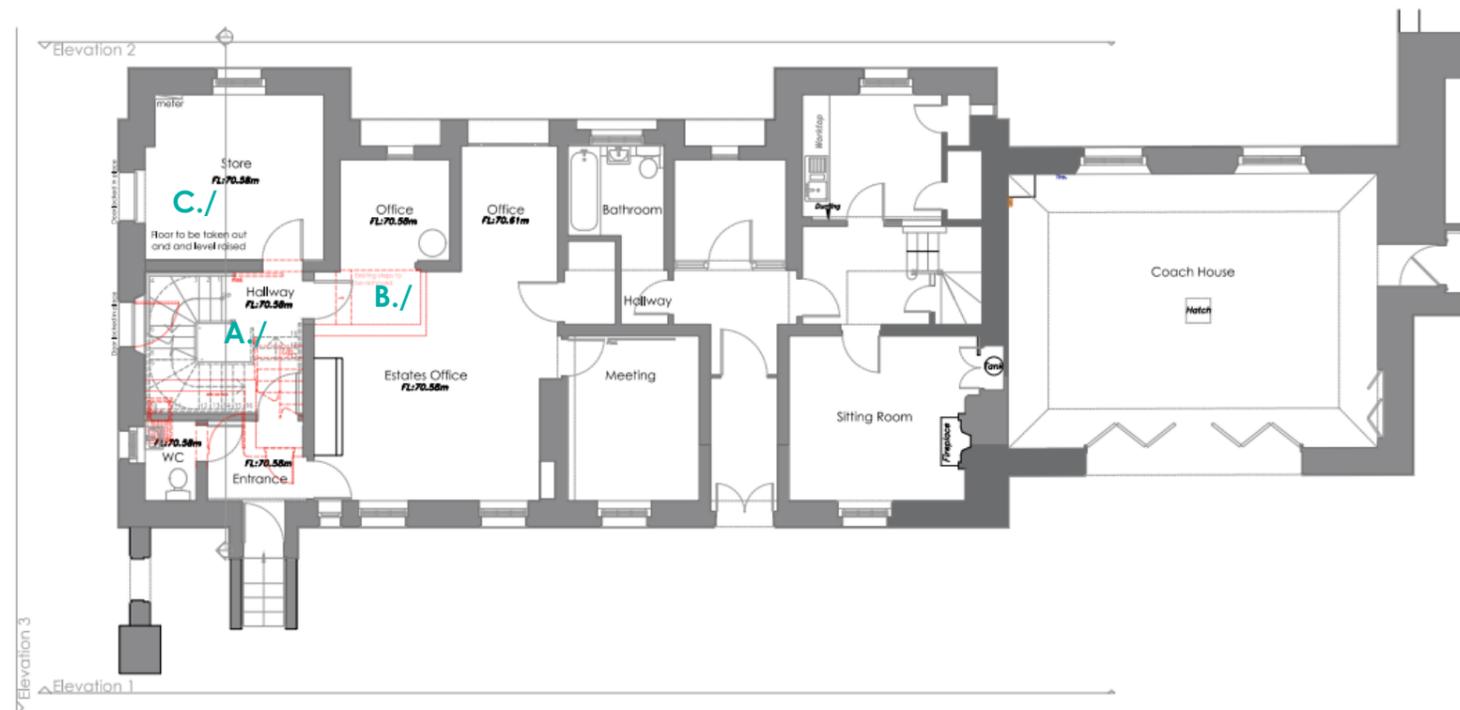
D./ Proposed glazed screen and doorway into meeting room.

E./ Proposed new door within first floor corridor.

In addition, the following general interventions are proposed:

F./ Environmental upgrades to historic fabric

G./ Provision of new services and adaption of existing services. This includes the installation of extract fans to kitchen, bathroom and WC.



Proposed Ground Floor Plan

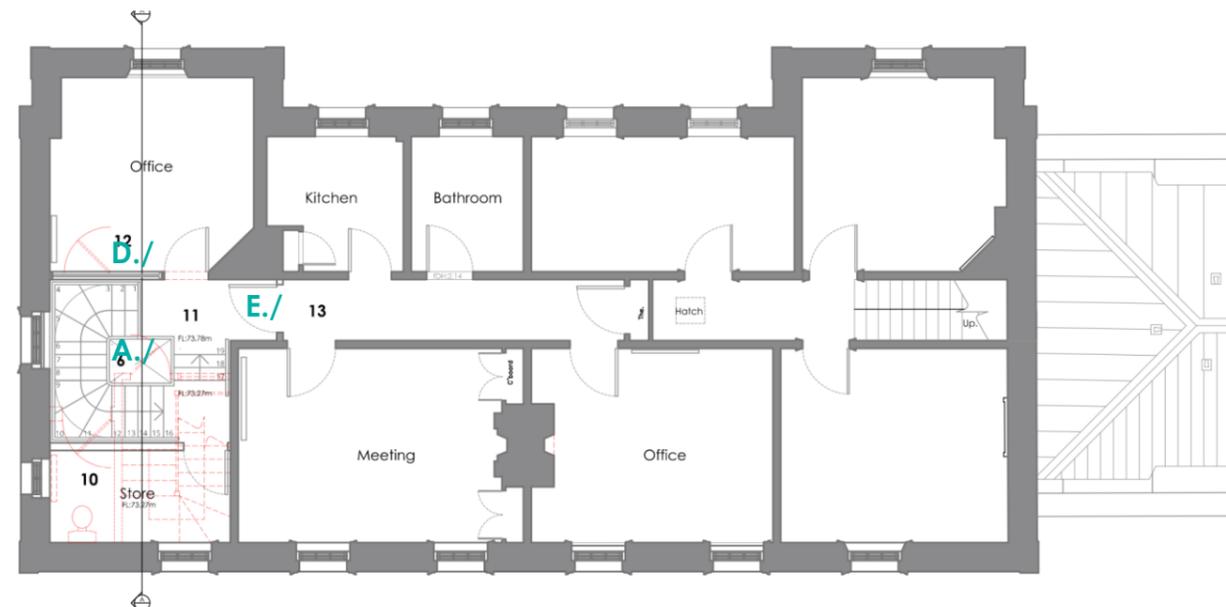


Fig. 20 Overview of Interventions.

4.0 Heritage Impact Assessment

4.4 ASSESSMENT OF INTERVENTIONS

A./ Removal of the existing stair and formation of a new stairwell, including new internal walls.

Proposal: To remove the existing stair and associated internal walls to form a new, compliant stairwell and entrance lobby with associated WC.

Impact: The proposal will see the careful dismantlement and removal of the existing, timber stair, demolition of an internal masonry wall and an opening within the first floor to accommodate the new stairwell and associated store room accessed via a half landing.

The proposal has the potential to impact on original historic fabric and will affect the overall plan form of the Estate Office Building.

The intervention is focussed within an area that has already been subject to some adaptation and one which deviates from the original drawn intent as per Gordon and Gibson's proposals. Furthermore, the focus of these works to the north-west corner of the building allows the original plan form, specifically at First Floor, to be retained with central corridor and rooms to either side.

Though the existing stair appears to be original, it has been subject to some alteration and therefore its overall evidential significance is somewhat compromised.

The new stair, due to a necessity to comply with current regulations and offer safe egress as part of the first floor becoming part of the Estate Office, is larger to overcome the 3.2m level difference. It is intended that this will be formed from steel plate with timber infill treads and will follow the established conservation philosophy of assertive contrast through its contemporary aesthetic. Impact to the gable façade and associated external panelled door is offset by retaining the door in-situ and carefully lining the internal face of the wall. At first floor level, a new store is formed by the insertion of a half-landing.

The removal of the existing fabric required to undertake this work is deemed to be of low significance in the wider context of the Main House and loss of evidential significance through historic alteration.

Reversibility: Though it is acknowledged that the removal of the existing stair and internal walls cannot be reversed, the retention of the external door to the north west gable and considered detailing of the stair and its fixings to existing fabric mean that it could be removed in the future and the external door reinstated.

Mitigation: As a mitigatory measure, the original stair should be accurately surveyed, drawn and photographed to ensure a detailed record exists of its original components. The careful dismantlement and safe retention of original components for future use elsewhere within the house should also be considered.

As previously noted, the proposal of a new stair within the location of the existing stair ensures that the overall, original plan form is not compromised.

Compensation: The insertion of the new stair will allow the building to become compliant in terms of a dedicated escape from the proposed upstairs offices to a place of safety and forms part of the overall brief of providing a modernised working environment for estate employees. The proposed works allow for an enlarged entrance lobby and secure direct access into the stairwell, thereby providing a more efficient layout that future proofs the functionality of the Estate Offices whilst avoiding the removal of historic fabric of considerable evidential significance.

In addition, the proposed layout of the stairwell allows the existing external panelled door to remain in-situ and, if necessary, be reinstated as an entrance at a future date.

Outcome: The proposal seeks to remove the existing stair and associated internal walls to form a new stairwell and enhanced entrance lobby to improve the operability of the Estate Offices and provide adequate future-proofing for increased staffing levels that will contribute towards the ongoing sustainable future of the Mertoun Estate.

In the wider context of the Mertoun House as a whole, the Estate Offices are of moderate significance given their later construction from 1913-16 and lying out with the original works by Sir William Bruce.

It should be remembered that the Estate Offices have been subject to much alteration within their short lifetime as a consequence of the Mertoun Estate adapting to changing socio-economic conditions, such as the mass reduction in servant accommodation, for example. Therefore, it could be considered that this intervention is the latest example of this ongoing pattern and somewhat necessary for the Estate to sustain growth.

Overall, the plan form remains unaffected and the evidential significance of fabric affected remains low due to historic alteration. Specific considerations have been made to avoid any impact to the external fabric and therefore overall aesthetic significance of the Estate Offices as part of Mertoun House.

On this basis, it is hoped that the formation of the new stairwell is considered acceptable.

B./ Removal of partial suspended floor and internal screens from hallway and office areas.

Proposal: To remove the section of non-original suspended timber floor and timber glazed screens from the ground floor hallway and office area respectively.

Impact: The proposal will see the removal of non-original fabric of no evidential significance but care must be taken that it is done in a manner which does not affect fabric of evidential significance.

Reversibility: n/a

Mitigation: n/a

Compensation: The presence of the suspended timber floor appears to be an attempt to resolve the challenging topography around the building and currently facilitates access from the north west gable external door, though this is rarely used and is not the primary entrance to the building.

Overall, its removal will improve accessibility around the ground floor area, allowing a consistent floor level to be achieved that will be negotiable by those who are ambulant disabled and will omit trip hazards and improve overall legibility. These improvements align with the Mertoun Estate's desire to create a sustainable and inclusive working environment without compromising the significance of the heritage asset.

Outcome: The proposal is deemed acceptable on the basis that it removes non-original fabric and improves the overall legibility and accessibility of the existing building through the achievement of a consistent floor level.

4.0 Heritage Impact Assessment

4.4 ASSESSMENT OF INTERVENTIONS

C./ Works to former game larder, including new slapping and reduction in floor level.

Proposal: To convert the former game larder, now disused, into a storage area and form level internal access into it through a new slapping and reduction in internal floor level.

Impact: The proposal has the potential to impact upon fabric of moderate evidential significance. The room, though now used for storage, is finished in plain, ceramic Edwardian tiling with quarry tile floor. Based on the period of construction, it appears these are bonded directly to their respective substrates using a patent cement mortar. This aesthetic is reflective of a typical ancillary room and its former use is somewhat apparent due to this.

The ground floor of the former game larder sits 230mm above the established, consistent floor level of the ground floor. In order to ensure level access from the stairwell, it is proposed to form a slapping within an existing internal wall to form a doorway. The existing floor will be required to be broken out and a new floor slab constructed at a lower level to tie through with the remaining ground floor.

This work will see the loss of some historic fabric of moderate evidential significance, notably the quarry tiles and some wall tiling where the slapping is formed.

Reversibility: n/a

Mitigation: Prior to the commencement of works, it is proposed that a full drawn and photographic record survey of the game larder is undertaken, including a record of the floor tiling layout, to ensure an accurate record of original fabric is retained.

Subject to testing, it may be possible to salvage the quarry tiles from the floor, though this may prove difficult due to the strength of existing bond and brittleness of the tile. Consideration should also be given as to how the exposed sections of internal wall are finished appropriately due to the proposed lowering of the slab.

The proposed slapping within the internal wall will require making good where the surrounds interface with the tiling and a strategy of expressed detailing emphasising the contemporary nature of the opening may be more appropriate than attempting to unsuccessfully match the existing tiling bond and tile. It is proposed that the external door access is closed over and a management strategy is implemented to avoid its use.

Compensation: The proposal retains the overall external appearance of the Estate Offices, retaining their aesthetic significance, whilst allowing a greater degree of flexibility and operability internally, thus ensuring their current location which contributes to the overall narrative of the evolution of Mertoun House.

Outcome: The proposal seeks to convert the former game larder into a store with direct internal access. It will involve the removal of some historic fabric of low to moderate significance but does not affect the overall authenticity of the original plan form.

The works will see the improved overall operability of the Estate Offices and allow its proposed expansion to remain within their originally intended location, thereby avoiding further compromise elsewhere within the house.

Through the measures suggested such as detailed recording, potential salvage and considered detailing of openings it is hoped that this intervention is deemed to be acceptable.

D./ Proposed glazed screen and doorway into meeting room.

Proposal: To remove the existing internal wall and door at first floor level and replace with a glazed screen and door to form a new meeting room.

Impact: It is acknowledged that the proposal will see the removal of an original internal wall and doorway that is of moderate evidential significance. The overall plan form of the Estate Offices remains relatively unaffected with the works focussed around the new stairwell.

The remaining internal walls that sub-divide the corridor from the adjacent rooms allow the overall evolution of the plan form to be read are of primary aesthetic and historical value in terms of overall significance.

Reversibility: n/a

Mitigation: Consideration should be given as to how the new glazed internal wall and door are read as an intervention within historic fabric. It may be appropriate that the nibs and downstand of the original wall are left and that the glazed screen is regarded as an insertion as oppose to complete removal of the wall. This would allow the contemporary element to be 'read' within the original wall. Current proposals illustrate a desire to retain some privacy, with the glazed element reduced to the upper half of the wall. This approach, whilst still accommodating structural work, would see the retention of at least half of the original wall.

Compensation: The logic for this intervention stems from a desire to create a contemporary and efficient working environment, with improved natural light levels. The insertion of hardwood frames and glazing fulfils this element of the brief and retains a meeting room at first floor level, allowing for future proofing in terms of the day to day operation of the Estate Offices.

Outcome: The proposal is deemed acceptable on the basis that whilst it removes minor elements of original historic fabric the overall authenticity of the plan form is retained.

E./ Proposed new door within first floor corridor.

Proposal: To insert a new glazed door within the first-floor corridor for the purposes of security and

Impact: The impact of this intervention remains minimal, resulting in neither loss of historic fabric nor that of overall historic plan form. Historic intervention has already taken place within the corridor to close it off to form the separate cook's apartment.

The remaining internal walls that sub-divide the corridor from the adjacent rooms allow the overall evolution of the plan form to be read are of primary aesthetic and historical value in terms of overall significance.

Reversibility: Careful detailing of the junctions between the new frame and internal walls should determine that it can be removed in the future with minimal impact on historic fabric.

Mitigation: n/a

Compensation: Currently unused, the rooms to the First Floor are intended to become offices to accommodate the additional staff and efficient working environment required to ensure the ongoing successful management of Mertoun Estate. The insertion of the new door provides a potential 'secure line' between the meeting room and office space, a common condition of most contemporary offices.

Outcome: The proposal is deemed acceptable on the basis that it will not affect historic fabric and will enable the use of upstairs rooms as offices to ensure the ongoing management of Mertoun Estate.

4.0 Heritage Impact Assessment

4.4 ASSESSMENT OF INTERVENTIONS

F./ Environmental Upgrades to Existing Historic Fabric

Proposal: As part of the restoration of the heritage asset, a number of outline strategies could be proposed relating primarily to the upgrading of existing historic fabric to improve energy efficiency.

Impact: The strategies have the potential to impact upon historic fabric and must be considered in the context of how historic buildings perform environmentally. For all their apparent simplicity, old buildings are surprisingly complex and diverse. Vernacular buildings, in particular, demonstrate a sensitivity to regional climate in both form and orientation. Traditional forms of building construction take up moisture from their surroundings and release it according to environmental conditions. Buildings of traditional construction also tend to have greater thermal inertia than their modern counterparts; heating up and cooling down more slowly through the use of thick, solid masonry walls. This ability to 'buffer' moisture and heat helps to even out fluctuations in humidity and temperature. In simple terms many such buildings were designed with passive ventilation which ensured air flow around building elements helping disperse water vapour and keeping the fabric free from excessive moisture and subsequent decay. The materials used also allowed the free movement of water vapour within the structure. It can be concluded that despite their apparent rudimentary nature, historic buildings often deal with energy conservation using considered and sophisticated means that is not always immediately apparent. Breathable thermal upgrades should be proposed to the existing walls. The method used should be largely determined by the extent and condition of the original fabric that remains. Where original linings have been lost, more recent dry linings can be removed and replaced with insulation, either directly to the masonry ('on the hard') or, where space allows, the wall can be framed with timber to hold insulation in place. In general, thinner materials such as calcium silicate based insulation board, are best applied directly to the masonry, whilst thicker materials such as wood fibreboard and hemp board are best held in place with framing. Where appropriate, glass in new sash and case or casement windows can be specified as thin or slim profile double glazing.

Reversibility: n/a

Mitigation: In order for an appropriate assessment to be made, further detail is required to understand how each of the proposed environmental upgrades affects historic fabric and overall significance. This includes appropriate means of assessment when considering the upgrade of historic masonry walls using WUFI Numerical Simulation Assessment as per BS EN 15026: 2007.

Compensation: Upgrading of historic fabric, if done correctly, will aid in the protection of and ensure the extended lifespan of the building for many years to come.

Outcome: The principle of environmental upgrades is considered acceptable, subject to further detail and detailed survey of elements for replacement e.g. thick masonry walls.

G./ Provision of new services and adaption of existing services.

Proposal: The proposal will involve the potential, partial re-wiring and re-plumbing of the building in addition to the provision of new services to provide a contemporary level of comfort. Furthermore, new extract terminals for fans to the ground floor WC and first floor bathroom and kitchen will be required.

Impact: The proposal has the potential to impact upon historic fabric in areas of moderate and low significance via the damage caused by poorly planned services routes and mountings. This can include but is not limited to:

1. Chasing/ notching existing historic masonry and timbers to facilitate the service routes, thereby damaging historic fabric and, in extreme cases, compromising the structural integrity of the building.
2. Little aesthetic consideration given to the mounting of fittings or implementation of poorly considered surface, mounted service cabling.
3. Poor installation of concealed services resulting in damage to historic fabric and latent defects.

On the basis of the above, co-ordinated and careful opening up works should be implemented during the early phases of the project to plan and agree service routes that avoid affecting historic fabric of significance prior to first-fix M&E installation. Notching and cutting of historic timbers should not be undertaken under any circumstances and the chasing of masonry walls avoided where possible. Where expressed masonry is to conceal service routes, brickwork should be carefully removed, cut back and toothed in to avoid unsightly joints that break coursing and detract from the aesthetic significance of the building. Consideration should also be given to the provision of wireless systems, where possible, to mitigate the impact to historic fabric.

The installation of mechanical extract vents, a necessary requirement for Building Control purposes, will see the careful installation of these via flush roof vents within the slate roofs, with powder coated grilles to match. This strategy is deemed to be of less impact than attempting to core through the ashlar walls, specifically to the GF WC which would result in either the gable or west facing elevation, which addressed the service court, impacted.

Reversibility: Wireless systems and, in certain circumstances, surface mounted fittings, where aesthetically appropriate, avoid the cutting and notching of historic fabric and can be removed with little impact.

Mitigation: It is proposed that a detailed survey and opening up works are undertaken to agree and plan service routes that avoid historic fabric. Any historic fabric uncovered during the course of this early works should be diligently recorded for posterity. Powder coating of external grilles will

Compensation: If undertaken as set out above, new services will mitigate the chance of destructive defects to the heritage asset such as old wiring increasing fire risk or historic, corroded pipework increasing the risk of leaks.

Outcome: The proposal seeks to undertake new services provision throughout the heritage asset, potentially affecting historic fabric of varying significance. Subject to adherence to the considered methodologies set out above, this intervention is deemed to be acceptable on the basis that mitigation has been considered.

4.0 Heritage Impact Assessment

4.5 SUMMARY AND CONCLUSIONS

This document is intended to demonstrate that there is sufficient information, subject to detail, to comprehensively understand the impact of the works on the character of the listed building, and that the consequence of the proposals has been assessed.

The sustainable future of Mertoun Estate relies partially on the ongoing use and subsequent necessary adaption of this building. The proposals will not result in the loss of historic plan form with existing external historic fabric remaining almost unaffected.

The impact on the setting of building, specifically in the wider context of its position in relation to the main house and wider estate is not considered to be affected.

The proposed alterations and interventions are intended to be of a quality of design and execution which can be appreciated both now, and in the future, and will contribute to the historic evolution of the building in forthcoming years. This, however, is acknowledged as being subjective and no guarantee that the proposal will stand the test of time.

This document demonstrates that the nature of the proposals is such that they will not prejudice future alternative solutions. The proposals retain the historic character, significant features and heritage values attributed to the building and wider context.

The proposed interventions have been sensitively designed in a deferential manner and will improve the legibility of the heritage asset. The proposals preserve and enhance the historic character and appearance of the heritage setting and when considering the overall impact of the accrued level of intervention, the author is of the opinion that the proposals retain and enhance the cultural significance of the listed building whilst satisfying the conservation principles of legibility and authenticity.

In summary, we consider the proposals present no significant risk in terms of unnecessarily compromising the significance of the heritage asset and that the following objectives have been met in so far as:

- 1.) there is sufficient information comprehensively to understand the impacts of the proposal on the significance of the place;
- 2.) the proposal would not materially harm the values of the place, which, where appropriate, would be reinforced or further revealed;
- 3.) the proposals aspire to a quality of design and execution which may be valued now and in the future;
- 4.) the long-term consequences of the proposals can, from experience, be demonstrated to be benign, or the proposals are designed not to prejudice alternative solutions in the future.

It is hoped that these carefully considered proposals can be supported on the basis that they will significantly enhance the legibility of the chronology of the building and also put the building, and wider estate, in good sustainable order for the future.

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