

The Heritage Trust

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The Assessment Process

The Heritage Benchmark assessment is a straightforward process and follows a number of key stages:

Your organisation identifies a development site in which to apply for the Benchmark Award.

You complete an application form.

The Heritage Trust provides a quotation for undertaking the assessment. This fee will be dependant on the scale of the development.

When your organisation is ready to meet the Heritage Benchmark, your company will complete a self-assessment questionnaire endorsed by the Managing Director and is submitted to the Heritage Trust.

A Heritage Trust Auditor is appointed and an initial assessment is conducted. If necessary, your organisation responds to any problems identified in the initial assessment.

The main assessment is carried out.

If applicable, your organisation responds to any major issues identified that would prevent the auditor recommending the Benchmark certificate.

Subject to such issues being addressed, the auditor will make a recommendation. An appointed quality assurance auditor will check the assessment results and recommendation and advice the Heritage Development Trust of the outcome.

The Heritage Trusts' Chief Executive will approve the award of the Heritage Benchmark.

Development sites that have demonstrated exceptional management, execution and long term benefits to the local heritage of the area will be entered into regional and national awards. An annual ceremony will be held to celebrate and present the awards to the short listed sites.



Required documentation for successful application for the Heritage Benchmark:

- Heritage policy document
- Heritage assessment report
- Heritage management system (HMS)
- Site specific Historic Environment Strategy (HES)
- Documented mechanism by which heritage performance is reported
- Historic environment investigation reports

How to Apply:

Please click on the link below to download an application form and related documents

[Application Form](#)

[Heritage Benchmark Requirements](#)

[Self-Assessment Form](#)

[Assessment Process Guidelines](#)