



CORPORATE PLAN 2006-9

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1 EXECUTIVE SUMMARY

BEFS is a forum of non-governmental organisations that work within the built environment sector in Scotland. Members come together through the forum to discuss issues and influence strategic policy. The forum aims to promote understanding and awareness within the sector and work towards achieving successful places through collaborative action. Over the three year period 2006-2009, the forum will work on building its capacity, act as a focus for strategic issues, encourage constructive dialogue within the membership, champion issues of common interest and represent views to decision makers and influencers.

2 INTRODUCTION

BEFS seeks to be the key forum uniting non-governmental organisations in Scotland's built environment sector on matters of strategic common interest.

Performing an intermediary role, BEFS exists to support its members by raising awareness of, and facilitating joint working on, strategic issues of common interest. Through collaborative action, BEFS influences and promotes relevant issues to policy- and decision-makers. BEFS supports the activity of its members whose remits are concerned with the creation of successful places, for the benefit of people in Scotland.

2.1 Vision

A Scotland in which our enjoyment and use of the built environment is enhanced by successful place-making, combining the best of our historic and contemporary surroundings to benefit our economy and our communities.

2.2 Mission

We will bring together organisations with an interest in the built environment to pursue a common purpose of creating and maintaining successful places which benefit Scotland's communities.

2.3 Objectives

We will achieve our mission by:

- **Building capacity within the forum structure to work collaboratively on developing successful places**
- **Acting as a focus for strategic issues to be addressed and developed**
- **Enabling constructive dialogue within our cross-disciplinary membership on areas where there is both consensus and divergence**
- **Championing policies and practices that will improve our enjoyment of the built environment**
- **Representing the collective views of our members on policy and practice to decision makers and influencers.**

The purpose of this plan is to explain the role of BEFS, the nature of its operation and give outline activities for the three year period April 2006 - March 2009.

3 REMIT

BEFS is the only membership forum operating within Scotland that brings voluntary and professional bodies in the built environment sector together, with a view to raising awareness of, and influencing, matters of strategic policy and legislation.

The structure of BEFS has been created to enable partnership working, which in itself is seen as a key outcome. This occurs primarily within its membership, which is cross-disciplinary in nature, and also with other organisations working within the sector. The strength of BEFS is the diversity of its membership; BEFS exists to facilitate and support the activities of its members, without which BEFS would not exist. Aspects of BEFS' role can be summarised as follows:

- The forum provides information on current policy matters, thereby providing a point of focus for members on matters of common interest.
- The forum develops awareness by encouraging communication between the various interests across the sector. In doing so it aims to generate understanding, trust and respect.
- The forum provides a mechanism for gaining broader support on initiatives of shared interest. A key aspect is to identify points of commonality, however at times the role is to identify where views diverge. As the focus of BEFS' remit lies at the strategic level, views are generally conveyed to an audience of civil servants, Ministers, MSPs and researchers.
- The forum provides access to a wealth of knowledge and expertise and also provides scope for faster communication than would occur otherwise.
- Through these mechanisms, the members work together to explore and promote new issues. They also work together in reacting to issues being pursued in other fora.

4 BACKGROUND

4.1 Context for BEFS

BEFS was formally established in June 2003, however the need for a linking body for built environment interests in Scotland had been recognised since the mid 1990s - BEFS being preceded by emergent bodies Scottish Environment Amenity Link and Built Environment Forum (BEF). The development of BEFS through these bodies was driven by a need for improved communication between existing non-governmental organisations – both voluntary organisations and professional institutes – and for joint working on issues of common interest. The demise of the Historic Burghs Association (a member of BEF) provided an opportunity for BEFS to take on the research and lobbying interests that had occupied that association. The new Scottish Parliament gave added impetus to develop joint working and to seek to gain influence at the strategic level, on matters of significance for the built environment sector.

4.2 Legal Status and Office

BEFS is a charitable limited company (company number SC 250970, charity number SC 034488). The BEFS office is located at:

Built Environment Forum Scotland
33 Barony Street
Edinburgh
EH3 6NX

Telephone: 0131 556 5353

Fax: 0131 556 3306

Email: info@bef.org.uk

Website: www.befs.org.uk

4.3 Members and Stakeholders

The members¹ of BEFS are its key stakeholders. There are three levels of membership: Member, Subscriber and Supporter:

- Members: full Membership of BEFS is open to organisations that are recognised by the majority of existing BEFS Members as a non-governmental organisation, national in character (Scotland-wide remit or have a significant separate or devolved Scottish identity), and have aims and objectives compatible with those of BEFS.
- Subscribers: for organisations not eligible for Membership (or who do not wish to apply) but wish to be kept informed of BEFS activities and participate as appropriate.
- Supporters: open to individuals with an interest.

The unique aspect of BEFS is that it seeks to include, within its membership, organisations from across the built environment sector – thereby accommodating both voluntary sector bodies and professional institutes. The BEFS membership at November 2005 is shown below.

<p style="text-align: center;"><u>Members</u></p> <p style="text-align: center;">Architectural Heritage Society of Scotland Association of Preservation Trusts - Scottish Committee Council for Scottish Archaeology Garden History Society in Scotland Historic Houses Association for Scotland Institute of Field Archaeologists – Scottish Group Institute of Historic Building Conservation – Scottish Branch National Trust for Scotland Royal Incorporation of Architects in Scotland Royal Institution of Chartered Surveyors in Scotland Royal Town Planning Institute in Scotland Association for the Protection of Rural Scotland Saltire Society SCAPE Trust Scottish Castles Association Scottish Civic Trust Scottish Stone Liaison Group Society of Antiquaries of Scotland</p> <p style="text-align: center;"><u>Subscribers</u></p> <p style="text-align: center;">ALGAO Scotland Central Scotland Forest Trust Edinburgh World Heritage Glasgow Caledonian University – Heritage Futures Homes for Scotland Natural Stone Institute Scottish Urban Archaeological Trust Ltd Society for the Protection of Ancient Buildings in Scotland</p> <p style="text-align: center;"><u>Supporters</u></p> <p style="text-align: center;">George McNeill (former Chair)</p>
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¹ member (with lower case 'm') is used to describe the three categories of membership: Member, Subscriber and Supporter. Reference to the Member category of membership uses upper case 'M'.

Each member puts forward a nominated representative to be the key point of contact between the member organisation and BEFS.

Wider stakeholders comprise organisations with which BEFS is likely to interact. Of greatest significance is the Scottish Executive and in particular its agencies and advisers: Historic Scotland; Architecture + Design Scotland; Scottish Natural Heritage; the Historic Environment Advisory Council for Scotland, and the Ministers for Tourism, Culture and Sport; for Communities; and for Environment and Rural Development.

The Scottish Parliament is another key body with which BEFS interacts – in particular the parliamentary committees: Enterprise and Culture; Communities; and Environment and Rural Development, and the cross party groups: Architecture and the Built Environment; Affordable Housing; and Construction.

4.4 Management and Staffing

Since May 2003, BEFS has employed a full time Administrator and a part-time Administrative Assistant. BEFS is managed by a Board of Directors; who with the exception of the Chair are drawn from the Member organisations. The Board meets approximately six weekly. The Board and staff perform a purely operational function, facilitating the collaborative action of the member organisations and providing direction for the network.

4.5 Activity and Operation

Key activities can be summarised as follows:

- General Meetings: these are held quarterly and are attended by the nominated member representatives. They provide a forum for discussing relevant current policy activity and for formal reporting. They are frequently preceded by a presentation on a relevant issue, followed by discussion.
- Workshops and Seminars: these bring together members and also wider stakeholders to discuss issues. The outcome is often a consultation response, a statement or publication, or a summary report.
- Working Groups: these bring together members (including Subscribers and Supporters) and also wider stakeholders, to work on agreed tasks in accordance with BEFS' aims and objectives. Working groups are task specific – once the task is completed the working group either disbands or formulates a further task.
- Providing views on relevant policy matters: most views are directed towards the Scottish Executive – further information is given below.
- Information: providing information to members on current policy issues and circulation of a fortnightly Bulletin to members and other key stakeholders. The Bulletin summarises consultations, publications, news releases and relevant parliamentary activity.
- Research: defining research needs and managing research projects.

Views put forward collaboratively through BEFS are generated by the members and remain associated with the members – a BEFS view is not held distinctly from its members. Views are conveyed in a number of ways; a response to a consultation, a statement, a news release, a report, a publication. BEFS often adopts a formal method of sign up to a view so that support for the view is clear. In some circumstances members will hold divergent views and a BEFS statement would serve to illustrate this. Members will not be able to contribute to all views put forward, but only those on which the member has a relevant locus. Members are encouraged to put forward their own views as well as contribute to a view prepared collectively by BEFS.

The main method of communication within the Forum outwith meetings and events is by email. Information is also held on the website. Further detail on operational matters can be found in the BEFS Operating Practices.

4.6 Finance

In March 2003, Historic Scotland committed to core fund BEFS £45, 000 annually on an indicative basis for three years. This commitment has been rolled on, on a yearly basis, so at January 2007 BEFS holds an indicative offer of funding to 31 March 2008. During the course of 07-08 Historic Scotland will be requiring BEFS to review its system of financial management, moving from the more traditional core/project funding approach towards a system of full cost recovery.

Members pay an annual subscription – total membership income in 2005-06 was £6, 407 (2004-05: £6, 305). Turnover for 2005-06 was £78, 087 (2004-05: £52, 417, 2003-4²: £40, 363). Further detail can be found in the accounts which are available on the website.

Over the course of the period 2006-09, BEFS aims to accumulate a reserve to the level of three months worth of operating costs, with a view to increasing this to a six months worth if possible.

5 REVIEW OF ACTIVITY

5.1 Review Autumn 2002 – Summer 2005

The inaugural meeting of BEFS took place on 29 August 2002, and in February 2003 BEFS received a lump sum grant from Historic Scotland to establish an office.

Activity during the first two years was largely reactive – responding to Scottish Executive consultation documents and bedding in operating methods. The use of workshops (as a means of bringing together Members to discuss consultation documents) and seminars (to provide information on relevant issues) became key activities, along with the fortnightly issue of a Bulletin that provides information on relevant policy and parliamentary matters.

BEFS also worked with the Historic Environment Advisory Council for Scotland (HEACS) to facilitate stakeholder engagement on the important issue of heritage protection legislation, by arranging seminars on the current review of legislation in England and Wales and also on the need to review the Scottish legislation.

A significant achievement was the preparation, and launch in June 2004, of an advocacy document called 'The Bigger Picture – Investing in Scotland's Historic Environment'. Advocating the views of twenty-six stakeholder organisations which had been gathered via a series of workshops, the document called for the creation of a Scottish Historic Environment Auditing Framework. The document was submitted to HEACS, which went on to make a case to the Minister for Culture for the development of an ongoing process of audit. BEFS was pleased to hear the Ministerial announcement in May 2005 lending support to the creation of a new process of historic environment auditing in Scotland.

Other achievements included:

- the preparation of a briefing document on the value of the historic environment which was circulated to MSPs prior to a debate on the subject;
- the commission of phase one of a piece of research which sought to map built environment interests and activity in Scotland;
- the facilitation of a workshop, held at the Scottish Parliament in June 2005, which considered the primary role of a sustainable built environment and gathered views from a wide variety of stakeholders. A report was passed to the Scottish Executive to inform the drafting of a chapter on the built environment within the Scottish Sustainable Development Strategy.

Further information on activities can be found on the website.

During the period from August 02 – July 05, Membership increased from fourteen Members and one Subscribing member, to seventeen Members and six Subscribers.

² Figure for 2003 - 2004 is for a slightly shorter period: 11 June 03 – 31 March 04.

Membership has been weighted towards historic environment organisations although it is commonly understood that the aspiration of BEFS is to accommodate organisations from across the built environment sector.

5.2 Perceived Benefits

Consultation in the Spring of 2005 revealed that members value BEFS for the following reasons:

- **Exchanging Views and Raising Awareness:** Through the Forum, members gain an opportunity to hear views from other disciplines within the sector – thereby generating greater awareness and understanding of different perspectives on an issue.
- **Developing Policies:** Participation in workshops can help members formulate their own views on policy issues.
- **Keeping Members Up-to-Date:** Information received through BEFS helps provide focus for members on current policy developments.
- **Networking:** Through regular meetings, events, and email contact, BEFS provides an opportunity for regular contact with other member organisations within the network.
- **Influencing National Policies:** The work of the Historic Environment Review Taskforce - which gathered views from relevant stakeholders, promoted these to the Government and secured a shift in policy - was cited as a key achievement for BEFS, and a good illustration of its value and method of operation.

Historic Scotland observed that BEFS is very well placed to develop relationships and promote a holistic approach to the built environment, and to fulfil an independent lobbying role on strategic issues when necessary.

5.3 Perceived Limitations

The consultation also revealed a number of limitations that BEFS faces:

- **Capacity:** Involvement in BEFS activities is voluntary and time limited.
- **Funding:** The funding base is narrow and needs to be broadened.
- **Profile:** BEFS is known within the historic environment sector and now needs to widen its profile - particularly in relation to the Parliament and parts of the Scottish Executive beyond Historic Scotland.
- **Membership:** The balance of membership has been weighted towards historic environment interests although BEFS seeks to represent interests across the built environment sector. Within the members, the amount of 'trickle down' beyond the nominated representatives has been variable.

6 ACTIVITIES 2006 - 2009

It is assumed that funding from Historic Scotland will continue at the current level throughout the period, that existing members will remain members, and that the staffing level will remain the same or increase slightly in order to support the development of project work. The activities outlined below may well change in response to any change in circumstances.

Activities for the period 2006 - 2009 broadly fit into the following areas, which align with the key objectives given at 2.3:

1. Continue to Expand the Membership

This will help BEFS build its own capacity and generate cross-disciplinary working. BEFS will:

- 1.1 Approach potential members (including Subscribers), targeting gaps within the current membership

2. Develop and Implement Communication Methods Within the Forum

This will help BEFS build capacity and generate cross-disciplinary working. BEFS will:

- 2.1 Market BEFS within the Forum by creating a more varied range of communication methods – to encourage wider participation
- 2.2 Develop a methodology for setting up working groups and tying group tasks into BEFS priorities, reporting, and work planning

3. Continue to React Strategically to Issues of Significance

This will help BEFS provide focus, generate cross-disciplinary working and represent member views. BEFS will:

- 3.1 Continue to monitor policy development activity for members
- 3.2 Develop and adopt a more strategic approach to responding reactively on behalf of BEFS members, to ensure high quality high impact responses
- 3.3 Continue to draft responses to consultations, statements etc. which identify points of consensus and also of divergence within the membership
- 3.4 Continue to facilitate workshops and seminars that enable members and other stakeholders to develop awareness and understanding
- 3.5 Continue to put forward delegates to other for a
- 3.6 Monitor impact of BEFS' activities to determine effectiveness in influencing policy formulation, supporting members and generating awareness

4. Proactively Explore and Promote Issues of Common Interest

This will help BEFS provide focus, generate cross-disciplinary working, represent member views and champion issues. BEFS will:

- 4.1 Develop a framework for exploring issues raised by the members – moving from issue towards outcome
- 4.2 Embed built environment issues into other policy agenda, for example by developing a series of shared strategic statements and a policy for the built environment
- 4.3 Focus attention on the following key themes for the built environment in Scotland, by exploring, researching and promoting issues associated with each theme (activities will be prioritised according to external influences, requirements identified and availability of resources):
 - The social and economic importance of identity and sense of place in Scotland's towns and cities
 - Establishing a shared vision for Historic Environment Record Services
 - Producing and maintaining quality in the public realm and urban greenspace
 - Establishing values and effective policies for cultural landscapes
 - Integrating new development into the historic environment
 - Raising standards in housing design
 - Built environment and education
 - Built environment and sustainable development
- 4.4 Monitor impact of BEFS' proactive efforts to determine level of influence on legislative development and policy formulation

5. Continue to Raise the Profile of the Forum Within the Policy Arena

This will help BEFS build its own capacity and put BEFS in a better position to represent views and champion issues as necessary. BEFS will:

- 5.1 Seek opportunities to engage with Architecture + Design Scotland, Scottish Executive Departments and other key stakeholders

5.2 Ensure publicity material, statements, reports etc are up to date and easily available

6. Diversify the Funding Base

This will enable BEFS to develop its activities in a broader range of policy areas and increase activity overall. BEFS will:

6.1 Define and develop projects in order to seek funding, and identify additional income streams

6.2 Develop financial management system to apply the model of full cost recovery in costing activities and seeking funds

6.3 Increase membership income by expanding membership

7. Ensure the Good Governance and Operation of the Forum

This underlies the achievement of all the objectives. BEFS will:

7.1 Continue to improve operating procedures in line with legal requirements and best practice

7.2 Seek new office accommodation to support operational needs

7.3 Prepare successive Implementation Plans

7.4 In the Spring of 2008, carry out a quinquennial review to review organisational structures

Through annual Business Plans developed each Autumn, tasks will be assigned to each financial year and financial implications assessed.

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