



Historic Environment Scotland – Early direction of draft Corporate Plan

Key messages from BEFS workshop 25/06/14

SUMMARY

- The Plan needs to be ambitious, visionary and improve current practice
- The Plan needs to recognise HES as one of many players - as a supporter and enabler of others
- An overall dual presentation of 'guardian' and 'champion' could be explored
- The Plan needs to be clear over what HES has direct responsibility for, and what HES does in collaboration with others
- A strong suggestion that the PIC function be treated separately, distinct from the enabling role
- Clarity is needed over HES' role in relation to the undesignated historic environment

1 Introduction

1.1 As the Bill to create Historic Environment Scotland (HES) proceeds through the Scottish Parliament, staff within Historic Scotland (HS) and the Royal Commission on the Ancient and Historical Monuments of Scotland (RCAHMS) are working together to develop a draft Corporate Plan for the new organisation - this in readiness for the new Chairman and Board of HES, who will commence work in April 2015. The purpose of this small workshop was to explore input and reaction to the initial, quite raw, material which represents emerging strategic direction developed around the functions set out in the draft Bill. The workshop was held on 25th June 2014 with representatives from BEFS membership participating (organisations are listed below). This early engagement with colleagues in the sector also served to signal a shift towards a much more open and collaborative mode of working based on, and further building, trust between delivery partners.

1.2 Adam Jackson (RCAHMS) and Denise Mattison (HS) gave a brief overview of the process and structure of the material which colleagues were then invited to consider. Initial discussion

covered concerns over use of the term 'lead', the hope that the Corporate Plan will be ambitious, and the need for the Plan to relate to other strategies (Museums and Galleries, Tourism) and indeed link through to the National Performance Framework. These themes are picked up below.

- 1.3 Participants discussed the material provided in two break-out groups and then came together in a plenary to share feedback. Overarching points are given in section 2 below, and more detailed points under the themes in sections 3-9.

2 Overarching Points

- 2.1 *Leadership style – 'an enabler'*: The Historic Environment Strategy for Scotland 'Our Place in Time' (the Strategy) promotes a collaborative ethos and way of working across the sector. Stakeholders envisage HES as an 'enabler' rather than 'director' of activities. The Plan needs more outward focus, for example through recognising the contribution of others in delivering across every strategic priority. Participants agreed that the language in the material presented currently comes across as 'arrogant' and 'inward-looking'. The language used will need to convey the enabling and supporting role more clearly; for example the term 'collaboration' has greater resonance than 'partnership' since the latter implies more control.
- 2.2 *Ambition*: This is a fantastic opportunity to improve how HES operates and works with other players. There is a risk that the Corporate Plan may simply amalgamate functions of HS and RCAHMS, with no consideration around how care for the historic environment sector could be improved as a result of the merger. It was suggested that a vision document with strategic aims is needed, and a longer time frame used – for example ten years to align with the Strategy. An outcomes approach would help align with both the Strategy and National Performance Framework (a footer on each page could illustrate the 'line of sight' from the Scottish Government purpose, through the Strategy, to the particular Corporate Plan priority). This is a 'chance to take stock and improve'.
- 2.3 *HES' functions*: The Corporate Plan needs to be clear about which particular functions HES has direct responsibility for and which are undertaken in collaboration with others in the sector. The functions are broadly expressed in the legislation however within the Corporate Plan these will need to become more precisely expressed.
- 2.4 *Outward relationships*: The Strategy offers opportunity to recognise the particular value that the independent third sector brings. There are concerns that charities will be 'squeezed out' (reference was made to charitable activities at the Scottish Traditional Skills Centre at Fyvie, and the Scottish Lime Centre, and how the new Conservation Centre at Stirling might impact on these). Participants very much welcome an approach which recognises leadership throughout the sector, with HES playing a significant part – alongside local government and third sector players which have their own particular roles and strengths. There has been plenty of reference to 'growing the cake' in deliberations around the Strategy and HES Bill – the draft Corporate Plan is a potential vehicle for addressing issues around capacity, state aid and how HES will relate to the third sector.

2.5 *Prioritising HES' functions:* In terms of structure one group discussed a dual focus/presentation of 'guardian and champion'. Currently, the structure of the document implies equal weighting to the six themes. It was commented that theme D includes too many functions (Properties in Care (PIC), grants, regulation); that these in themselves are of an equivalent weight to other themes. The regulatory function of HS was strongly valued and one group gave prominence to this particular role. It was also recognised that the regulatory role will sit within a range of functions which will become statutory through the enabling legislation for HES. HES' responsibility in relation to the extensive undesignated historic environment was raised as an area where greater clarity is needed.

It was commented in both groups that the emphasis seems to be on the PIC function yet participants would view other functions as equal, if not higher, priority. It was suggested that the PIC function sit as a separate theme to strengthen transparency.

Identifying threats (climate change, agricultural destruction, coastal erosion) was also identified as a specific function which perhaps does not yet feature. The Plan will need to commit HES to prioritising resources within the context of identified threats.

2.6 *Audience and language:* There is a question as to who is the audience(s) for the Plan? The audience may be very wide (or more than one) and care needs to be taken over the language used. A glossary would help. Care needs to be taken around wording such as 'expert' and 'specialist' – this can be interpreted as exclusive and push readers away.

3 Comments on A: Identifying and Recording the Historic Environment

3.1 There are opportunities to improve how we identify and record the historic environment, for example:

- How we prioritise recording – including comments that the Scottish 10 initiative is relatively expensive
- A chance to address inconsistencies – for example in relation policies on charging and copyright.
- An opportunity to look at how we handle designations (specific reference to listing)
- An opportunity to think strategically about how we value historic environment – in particular how local communities value the historic environment. This is especially relevant in the context of diminishing resources.
- Sharing expertise and recognising the contribution of others eg local museums
- Maintaining a sustainable core dataset
- Prioritising the Buildings at Risk Register
- Codes of practice – an opportunity to look at commitments to professional standards

4 Comments on B: Understanding and Interpreting the Historic Environment

4.1 It was suggested that there are too many commitments under this theme and there is overlap with the theme above. Participants considered how HES could come across as an enabler of activity. For example participants saw HES as ‘an enabler of printing activity’ rather than ‘the public sector publisher’. There are others who are also doing ground breaking research. This theme could highlight a commissioning role for HES. The term ‘audience’ implies passive engagement – whereas using the term ‘participants’ would be more inclusive. The Arts and Humanities Research Council’s Independent Research Organisation (IRO) status of RCAHMS should feature here. There is a question as to who has the principle responsibility for research – and funding of this. Reference was made to Scotland’s Urban Past which is pushing boundaries through sharing skills and knowledge.

5 Comments on C: Learning About, and Educating Other About, the Historic Environment

5.1 Again the enabling role was discussed and reference made to a ‘participation ethic’ with different players leading on different activities. The Heritage Lottery Fund has for example driven developments in education practice. There are other strategies that are relevant here for example the Community Learning and Development Strategy. There is a need to develop skills and capacity in the right places. Physical and social accessibility are key issues.

6 Comments on D: Protecting and Conserving the Historic Environment

6.1 As outlined under overarching points at 2.5 above, it was felt that this theme covers too many functions. More specifically, there are opportunities to improve how we protect and conserve, for example:

- Opportunity for improved transparency around grants
- Ensuring that the mechanisms are in place, and used, in supporting local authorities in decision-making
- The relevance to the preventative spend agenda should figure more strongly – the sector has long advocated a ‘stitch in time’ approach which is well expressed through the term ‘safeguarding’. References were made to mothballing, VAT regime and prioritising investment towards repair work over large scale ‘vanity’ projects.

6.2 This theme should identify HES’ wider policy responsibilities, such as commitments under international charters; role as a consultation authority under Strategic Environmental Assessment; and also integration with other strategic policy documents such as the Archaeology Strategy, National Planning Framework, Scottish Planning Policy, the Tourism Strategy and Museums & Galleries Strategy. Clarity is sought on the meaning of the term ‘Conservation Principles’ – this being an important key commitment.

7 Comments on E: Managing and Promoting the Historic Environment

- 7.1 The terms 'promote' and 'manage' do not necessarily sit comfortably together. Greater mention could be made here of the contribution to the preventative spend agenda. There are linkages with the cross-cutting theme of mainstreaming. The relationship between the Historic Environment Policy Unit (HEPU) and HES was also raised. One group identified that promotion must not focus purely on the Properties in Care but that the role should encompass wider promotion of the historic environment (which could include promoting PICs within the context of the wider historic environment). The opportunities here are perhaps more around collaboration rather than partnership – especially through relationships with private owners.

8 Comments on F: Collecting and Exhibiting (Historic Objects)

- 8.1 There are overlaps here with theme A – identify and record. It was queried as to why objects are treated separately since the definition of the historic environment in the Strategy encompasses objects. There is considerable potential for collaborative working within this theme, especially through locating objects in places where they have relevance. There is a lot of attention placed on digital work – potentially at the expense of ongoing curation and active curation of 'analogue' collections. The Plan should make a commitment to long term curation – also care is needed with the wording, for example 'to curate' (not 'build') a dynamic collection. An assessment of the existing collection would be a welcome commitment. There is also a reference to aerial photography which seems quite specific for an overarching commitment.

9 Comments on G: Cross-cutting

- 9.1 The independent advisory role was discussed: points covered the relationship between the Historic Environment Policy Unit (HEPU) and HES; the role of BEFS and potential for HES to join BEFS. 'Championing' cuts across all themes – this term is used in preference over 'lead'. An operational policy function will need to sit within HES. Sector skills and capacity were also highlighted as an underlying cross-cutting thread. A key commitment to place-making is really the 'point of doing it all' – this is seen as an outcome that cuts across all themes.

10 Summary

Overall participants found the content of the material presented to the workshop broadly relevant and hinting at possibilities. Overarching points to feedback are as follows:

- the Plan needs to be ambitious, visionary and improve current practice,

- the Plan needs to recognise HES as one of many players - as a supporter and enabler of others,
- an overall dual presentation of 'guardian' and 'champion' could be explored,
- the Plan needs to be clear over what HES has direct responsibility for, and what HES does in collaboration with others,
- a strong suggestion that the PIC function be treated separately, distinct from the enabling role,
- clarity is needed over HES' role in relation to the undesignated historic environment,
- participants very much welcomed the collaborative approach to developing the Plan and early sight of this material, and look forward to ongoing involvement as thinking evolves. The corporate planning process offers a mechanism for enabling people to contribute to plans for the new body.

11 Acknowledgements and participants

The event was organised by Built Environment Forum Scotland with support from Historic Scotland.

Thanks go to everyone who participated in the workshop, and in particular to Adam Jackson (RCAHMS) and Denise Mattison (Historic Scotland) for speaking, John Pelan and Jo Robertson (BEFS) for facilitating and Anne Wilkinson (BEFS) for administration of the event. Individuals from the following organisations participated in the event:

Archaeology Scotland
 Architectural Heritage Society of Scotland
 Association of Building Preservation Trusts – Scottish Committee
 Association for the Protection of Rural Scotland
 Built Environment Forum Scotland – Trustee
 Institute for Archaeologists
 Institute for Conservation
 Institute of Historic Building Conservation – Scottish Branch
 National Trust for Scotland
 Royal Commission on the Ancient and Historical Monuments of Scotland
 Royal Town Planning Institute in Scotland
 Planning Aid for Scotland
 Society of Antiquaries of Scotland