

Workshop Report

Historic Environment Scotland – draft Corporate Plan

(Stakeholder pre-consultation workshop, held
5th February 2015)



1 Introduction

1.1 Following a BEFS workshop in June 2014 on the early direction of the Historic Environment Scotland (HES) draft corporate plan, BEFS hosted a subsequent discussion on the evolving draft document. Discussion centred on the following questions: is this what you were expecting/ were there any surprises?; does it tell you what you need to know?; what else would you like to see included?; how would you like HES to behave when it is 'leading', 'doing', 'enabling'?

2 General comments

2.1 *Vision and outcomes:* There is still room for the document to be more visionary - the document still reads as though there are two voices – a coming together of existing activities rather than a more ambitious approach. The purpose of HES needs to be more clearly articulated; what it is accountable for, what its role is, and reporting lines and interfaces. There is an issue around credibility – what we want HES to achieve (aspirations) and what is currently possible/deliverable. It would be helpful if the corporate plan were to recognise current capacity within HES and the sector to support the delivery of the HES corporate plan and the strategy 'Our Place in Time'. Concerns were expressed around organisational resilience and capacity. The National Performance Framework outcomes could 'sing through' more clearly (there is a danger of 'silo mentality' with the approach of dividing up the different strategic objectives). A focus on outcomes will assist in monitoring progress and demonstrating impact, linking into the measuring success aspect of the strategy. The purpose of HES needs to be more clearly articulated.

2.2 *Charitable status:* the document needs to be able to express evolving thinking around whether HES will seek charitable status; the document should not become time-bound, particularly on this matter of charitable status. Implications of any decision around charitable status need to be expressed in the corporate plan.

2.3 *Operational content:* It was also recognised that while identifying wider relationships, the document is first and foremost a plan for HES – objectives will need to be clearly defined with reporting and budgets developed accordingly. The document does not yet set out any detail around how, what, when, how much; it is presumed that this would follow in subsequent action plans. This will help convey an

idea around how priorities are to be weighted and also whether there are an 'optimal' set of activities which would provide the focus for the plan and help express the role of HES. The draft is simpler than the previous draft; this was welcomed however some of the meaning has now been lost in paraphrasing. Also key messages need to be reiterated in a consistent way throughout the document, since many will not read the entire document. The timescale was queried – a ten year timeframe might be appropriate. Three years is very limited given the degree of transformative change surrounding the creation of HES. That said, the draft plan could conversely be drafted with a short timeframe to enable the incoming Board and Chief Executive to develop the plan.

- 2.4 *One of many:* The emphasis on 'leading and enabling' and collaborative working in the introductory remarks was welcomed, however it was also recognised that this needs to follow throughout the document. HES is 'one of many players'; phrasing such as 'leading operator' or 'the guardian of Scotland's heritage' cuts across the intended collaborative/enabling approach.

3 What would we like to see

- 3.1 *Collaborative tone:* There is still room for the language to relate the work of HES more clearly to that of other organisations – the body will be 'a' lead in a complex landscape. There is a need to better identify or articulate the landscape that HES will operate in, for example recognising the role that other bodies (such as professional institutes) play in developing standards, monitoring and enforcement. Local priorities defined by local authorities will not necessarily align with those of HES. In order to convey a more collaborate way of working, the document could contain more words of intent around 'supporting and 'encouraging' rather than purely 'doing'. Suggestions for wording/tone to convey a collaborative approach:

- 'we will support the development of'
- 'we will work with others to...'
- 'we will encourage/require our own staff to comply with..'
- 'we will learn from..' (activity in other parts of the sector)
- 'protecting the historic environment through designation and by supporting others to manage the designated and undesignated historic environment'

- 3.2 *External relationships:* As a non-departmental public body, the arms-length relationship with central government needs to be clearly articulated, particularly in relation to achieving curatorial independence. In a collaborative environment, the plan needs to clearly express HES' role and relate this to delivery across local government and the voluntary and private sectors; all activity being set within the context of the strategy 'Our Place in Time'. The plan could do more to explain the

relationships between HES and bodies such as the National Trust for Scotland, local government and the Historic Environment Policy Unit. The new corporate plan for Historic England for example explicitly recognises the relationship with local authorities. It may help if wider relationships were expressed graphically. Also the document needs to relate to other strategies such as the 'Tourism 20:20 Strategy'. Care needs to be taken in using terms such as 'partnership' or 'memorandum of agreement' which have specific meanings.

4 Specifics

4.1 *Understand*

- The document is light on the issue of curatorial independence which was a key issue in the HES Bill discussions. This needs to be addressed at the corporate plan level.
- The role of the commercial sector in paying for research needs to be recognised.
- A commitment in the plan to HES maintaining 'Registered Organisation' status (a Chartered Institute for Archaeologists accreditation) would be welcome. RCAHMS currently holds this accreditation.
- The audience for the outcome 'Scotland's historic environment is better known and understood' could be better defined. An 'outcomes focus' needs to be applied, for example research is not an end in itself and the priority to 'apply new technologies and techniques' should to be placed in the context of a need.

4.2 *Protect*

- HES' regulatory role must be clearly highlighted and explained in this section, including aspirations for improving the regulatory function. The relationship with a supporting/enabling role must be clearly articulated.
- The section on knowledge, skills and materials needs to be expanded beyond the current technical focus to include a much wider range of historic environment related skills. There is potential for HES to influence demand for appropriate skills through their role in commissioning and consent processes.
- The emphasis on properties in care (PIC) needs to be balanced with other activities – the detail on PIC could be pulled out in a separate document. The focus on PIC needs to be balanced with management of the wider historic environment which is largely in private ownership.

4.3 *Value*

- The document could be more front-footed, for example setting the historic environment in the context of place.
- The document is quiet on membership and could also address learning more.

5 Behaviours

5.1 Participants were invited to consider how they would like the new HES to behave – the feedback was as follows:

- Stronger ‘presence’ as national public sector champion on major developments / pressures (such as affecting landscape)
- Seek a critical friend relationship (rather than parent-child)
- Respectful
- Transparency
- Collaborative
- Leadership (where appropriate)
- Clarity of organisational values
- Consistency – adhering to professional standards throughout the organisation (code of conduct?)
- Communicative
- Staff to have greater autonomy/discretion
- Integrity
- Mutuality
- Braver
- Robust
- Provide strategic overview
- Openness (already a shift here?)
- Be proactive
- Trust others
- Improved planning
- Decisiveness on prioritising resources
- Understanding of and empathy with grass roots
- Advocate for relationship building between government and voluntary sector

6 Next steps and acknowledgements

6.1 The content from the discussions will be fed into the drafting process. Formal consultation on the draft Corporate Plan for HES will take place later in 2015.

6.2 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 Tamsin Russell (Historic Scotland) for presenting, and Tamsin Russell, John Pelan, Jo Robertson and Anne Wilkinson for

facilitating and administration of the event. Individuals from the following organisations participated in the discussions:

Architecture and Design Scotland

Architectural Heritage Society of Scotland

Association of Local Government Archaeological Officers in Scotland

Archaeology Scotland

Chartered Institute for Archaeologists

COSLA

Friends of Glasgow West

RSA Fellows' MCICH Network

National Trust for Scotland

Royal Commission on the Ancient and Historical Monuments of Scotland

Royal Town Planning Institute in Scotland

Strathclyde Building Preservation Trust

Visit Scotland

Panel for Historical Engineering Works