

## Workshop Report

### Scottish Historic Environment Audit (SHEA) 2016: Key findings and messages

Workshop held 27<sup>th</sup> September 2016  
at John Sinclair House, 16 Bernard Terrace, Edinburgh

#### **1 Introduction**

- 1.1 Karen Robertson from Historic Environment Scotland (HES) welcomed everyone and introduced the workshop, which was convened to provide an opportunity for stakeholders to consider draft findings for the 2016 Scottish Historic Environment Audit (SHEA). Colin Welsh from Jura Consultants gave an overview of the headline messages and presented key statistics from the audit. Suggested changes going forward included a more collaborative approach to managing the SHEA, the need to formalise the process of information requests, some restructuring of the report to provide information on the same topic in one place, regional analysis of specific issues. Jo Robertson from Built Environment Forum Scotland (BEFS) gave a short overview of the work of the Measuring Success Steering Group which is tasked with developing a performance measurement framework for the Strategy *Our Place in Time*. This has developed a set of sector-wide outcomes and indicators, focussed on measuring the sector's overall impact.
- 1.2 Questions and comments in response to the presentation on the SHEA findings covered the following points. In terms of reporting trends participants noted that these should cover the full time frame of SHEA where possible, rather than reporting short term bi-annual changes. Over the longer term, there is the question 'is the historic environment in a better or worse state?'. It was observed should the SHEA seek to answer this or should this be answered through the measuring success initiative? The interpretation of statistics alone is challenging. It was clarified that narrative will accompany the statistics. It was questioned whether the SHEA report should seek to interpret the data. Participants commented that the data should be presented in an impartial way, as data users will interpret the data differently. It was also commented that qualitative information behind the statistics will help data

users in understanding the trends. Regarding particular measures, data on conservation areas is seen as a priority especially as these are part of the suite of designated assets, are managed by local authorities and also include a high proportion of category B and C listed buildings. Also the inclusion of reference to intangible cultural heritage was welcomed and seen as a priority for data collection.

## **2 SHEA 2016 – what participants valued**

- 2.1 Participants commented that the SHEA is a good starting point for sourcing data which then requires some analysis and interrogation by the user; so the SHEA acts as a catalyst for discussion. It is the only free source of figures on the sector – it is a compendium of data which would otherwise require contacting multiple sources. It is valued as a ‘state of the nation report’. The consistency of data collection is appreciated where it exists. In particular, measures of condition are useful and the data on conservation areas is valued since this helps make a linkage between local and national policy on the historic environment.

## **3 Use of SHEA**

- 3.1 The SHEA is currently used for advocacy purposes (briefing Ministers, parliamentary debates etc), and in preparing funding bids. It is also currently the main evidence base for the measuring success initiative and BEFS and HES will be exploring the future relationship between SHEA and measuring success. In future participants hoped that the SHEA would be used more for advocacy purposes, and also used more at the local level. There is potential to use SHEA data to relate the historic environment to other sectors/policy priorities (for example tourism and also the climate change agenda) and also place the historic environment within a wider national/international context.

## **4 Priorities for SHEA**

- 4.1 Discussion groups identified the following key priorities that they wish for SHEA going forward. It should be noted that many of these issues will not be able to be taken account of in SHEA 2016, but will be considered for future data analysis.

**Big data:** The need to include ‘big data’ and to include data from a wider range of data sources (currently the data represented is ‘Historic Environment Scotland (HES) heavy’). Wider sources might include Scottish Natural Heritage, Network Rail, Churches, Scottish Canals, local authorities, Crown Estate, Ministry of Defence, universities.

**Comparisons:** using SHEA data to make comparisons (geographically, especially internationally) and across policy themes.

**Consistency in data collection:** the need for consistency of data collection and explanation where there has been a change in methodology. There is a need to make caveats to highlight that different organisations count things differently. Data should be accompanied by explanation from the source organisation of any significant changes.

**Digital opportunities:** move towards datasets being downloadable and GIS compatible and make data available at local level as well as national.

**A 'State of the Nation' Report:** A 'State of the Nation' Report giving headline indicators about the sector remains essential. It was also commented that the SHEA could be subsumed into the work on measuring success of OPiT, which is outcomes focussed and helps illustrate the benefits of the historic environment for people. Within this context, there remains widespread support for the continuation of a core set of data describing the 'state of' the historic environment.

#### 4.2 **Specific data:**

- The reporting of Historic Landuse Assessment (HLA) to be removed, and replaced with a measure for land use change monitoring and coastal change. A further suggestion that the HLA measure be amended to measure the extent to which HLA content is up to date.
- Removal of Buildings at Risk Register (BARR) data on A-list buildings as the NPF Indicator. It was noted that SHEA refers users to the BARR website which provides a more rounded picture of changes affecting buildings at risk.
- Include and develop data on conservation areas and local authority designations. (post meeting note: the number of conservation areas will be included in SHEA 2016).
- Develop the data on condition surveys to include data from a range of organisations.
- Develop data on the publication of archaeological grey literature (available through HES, FAME (Federation of Archaeological Managers and Employers), ALGAO).
- Develop data on undesignated historic environment (sources include ALGAO (Association of Local Government Archaeological Officers) data on planning applications, OASIS (Online Access to the Index of Archaeological Investigations), sites assessed by HES for designation).

## 5 **Key messages from 2016 SHEA**

- 5.1 Discussion groups gave 'gut reaction' feedback on what they considered to be the key messages arising from the data presented. The amount of the historic environment (and its widespread extent) emerged as a key theme, and the fact that

there is little reported change (which could only be loss) in the scale of the resource. Participants also picked up on the changes in sector capacity. Participants reiterated that they were keen that the SHEA presents data on intangible cultural heritage and social value. Also that the SHEA encompass the full extent of designated assets.

- 5.2 It was felt that the SHEA is useful for prompting questioning but there are not necessarily clear messages that can be drawn without further unpacking of statistics. For example, the message on spend could be interpreted differently. The trend on secondary education courses may well relate to the impact of the Curriculum for Excellence with its focus on inter-disciplinary learning. Narrative accompanying the statistics would help the user start to interpret their meaning. Ideally measures would be presented within a wider context eg visitor numbers within overall visitor activity in Scotland and so on.
- 5.3 To aid the presentation of headline statistics, participants considered two examples of infographics. Participants found advantages in each option; one for the fact that it relayed a 'story' about the sector in six statistics; the other for the fact that photographs helped give meaning to each statistic.

## **6 Summary**

- 6.1 In summary, participants were supportive of the SHEA for its impartial reporting of core information describing the 'state of' the historic environment. The SHEA should continue to remain impartial, reporting basic facts that users can interrogate and use in advocating for the historic environment. There is scope to improve data consistency; to review the content and the sources of data; make use of digital opportunities in presenting data. Also for the SHEA to provide supporting information (provided by the data originator) to help users understand reasons for changes in trend. This 'state of' reporting would complement the emerging focus on evidencing the sector's collective impact. BEFS and HES will be exploring the future relationship between the SHEA and the measuring success initiative, in order to meet the need both for core data and evidence of the sector's collective impact.

## **7 Participants and acknowledgements**

- 7.1 The workshop was organised by Historic Environment Scotland (HES) and Built Environment Forum Scotland (BEFS). Thanks go to everyone who participated in the workshop, and to Colin Welsh (Jura Consultants), Karen Robertson (HES), Jo Robertson (Built Environment Forum Scotland) and Denise Lauder (HES), for presenting, facilitating and/or organising the event. 25 individuals from the following organisations participated in discussions:

Architectural Heritage Society for Scotland  
 Association of Local Government Archaeological Officers in Scotland  
 Edinburgh World Heritage  
 Historic Environment Scotland  
 National Trust for Scotland  
 Society of Antiquaries of Scotland  
 Scottish Government

## 8 Appendix - Suggestions for future measures

In response to the question ‘what data is missing, what would you like to see?’ participants made the following suggestions for statistics to include:

<p><b>Cross Cutting Priorities</b></p> <p><i>Mainstreaming</i></p> <ul style="list-style-type: none"> <li>• Measure of visibility of historic environment within key policy documents.</li> <li>• Information on press coverage and measure of historic environment events in reporting period, and how they are covered in the media.</li> </ul>
<p><b>Understand</b></p> <p><i>Information on historic environment</i></p> <ul style="list-style-type: none"> <li>• Statistics on the records held in OASIS</li> <li>• Statistics on undesignated sites considered for designation</li> <li>• There are ‘unknowns’ associated with counting records</li> <li>• Backlog of uncatalogued items in HES collection</li> <li>• Number of hits on Dictionary of Scottish Architects</li> <li>• Data on assemblages could be broadened to include those in Treasure Trove system</li> <li>• Stronger connection with the Scottish Historic Environment Data Strategy (SHED) and the Archaeology Strategy</li> <li>• Items in all Properties in Care collections, not just those managed by Historic Environment Scotland</li> <li>• Inclusion of information on museums and local archives</li> </ul>
<p><b>Protect</b></p> <p><i>Extent of resource (designated and undesignated)</i></p> <ul style="list-style-type: none"> <li>• % of households in conservation areas (9.6% in 2008)</li> <li>• % of Scotland’s land surface covered by conservation areas (0.3%)</li> <li>• % Conservation Areas with Conservation Area Appraisals (recorded every two years since 1996)</li> <li>• Develop the undesignated assets figure to ensure a baseline against which change can be measured.</li> </ul>

*Management*

- Planning permissions granted as a % of total (and compare with trend and number of people in local authorities)
- Further unpacking of undesignated assets – for example ALGAO (Association of Local Government Archaeological Officers) can provide statistics on the number of planning determinations with archaeological conditions applied.
- Remove Article 4 Directions (since changes in 2011 Permitted Development Rights has led to changes in some of them)
- Analyse churn on the Buildings at Risk Register and extend to all categories of listing (building type, location, length of time on register, reason for removal from Register)
- Number of traditional buildings re-used buildings
- Unpack data on conversion of pre-1919 dwellings to show a measure of change to/development of older buildings
- More focus on world heritage

*Capacity/skills*

- IHBC (Institute of Historic Building Conservation) members – provide breakdown of membership and data on areas of employment
- Other accredited professionals – Royal Incorporation of Architects in Scotland, Royal Institution of Chartered Surveyors, Institute of Civil Engineers.
- Other sources of data on employment eg number of staff in archaeological units based in Scotland, number of staff in academia undertaking historic environment related teaching and research.
- A measure of skills supply and demand – and extent to which demand for skills is satisfied
- Impact of Community Empowerment Act
- Number of historic assets transferred to communities
- Number of community-led heritage projects (built and intangible)
- Data on full or partial closure of Properties in Care

*Investment*

- Data on expenditure and income from a broader range of players across the sector
- Income derived from developer funded archaeology
- Data on private investment
- Data on HES grant aided projects – impact of HES grants

**Value**

*Visitors*

- Survey to establish the Gaelic culture/language trend in visitors to sites (to inform interpretation materials and retail);
- A measure of the contribution of Gaelic to intangible cultural heritage (source information at School of Scottish Studies as well as Tobar an Dualchais etc.)

*Learning*

- A measure of skills/capacity coming into the sector (eg student numbers)

