

For further information please click: [CHERF](#)

Overarching	COLLABORATION & WAYS OF WORKING				
	SKILLS				
	ADVOCACY				
Meeting Strands	STATUTORY & POLICY	VENUES & DESTINATIONS	CONSTRUCTION & CONSERVATION	EDUCATION & RESEARCH	CIVIC SCOT & VOLUNTEERING
Integrated	consider CLIMATE to be mainstreamed				
Informed & Informing	NATIONAL & LOCAL: AGENCIES, ORGANISATIONS, GROUPS & COMMITTEES Scottish Government (observer)				
Outputs	OUTPUTS & ACTIONS ALIGNED TO PILLARS OF SUSTAINABILITY supporting Green New Deal/Green Recovery Just Transitions and developments towards Wellbeing Economy				
Pillars of Sustainability	ECONOMY	SOCIETY	ENVIRONMENT	CULTURE	
Sector Intelligence Informing	<i>Route map of medium and long-term actions to grow sector resilience, sustainability, and evidence of sector as a beneficial participant in Scotland's national recovery</i>				

## CHERF Scene Setting

### Initial key points:

The sector does not sit alone – it is part of the wider social and economic picture. An economic picture which looks particularly challenging for several years to come. A picture which necessitates new thinking, new ways of working and new collaborations. These initial discussions (and the further work which may arise) are designed to help inform the formation of a roadmap for medium and long-term sector resilience. CHERF exists to provide a space to think about these difficult questions.

- **We will not return to business as usual.**
- HES [sector survey results](#) – highlights breadth and depth of concerns for the sector’s many organisations, regardless of scale. [HES Chief Executive, Alex Paterson](#), made it clear that HES is not insulated from the impact with over 900 members of staff currently on furlough.
- Short terms actions: we need to make the most of schemes available to address current **financial challenges**.
- CHERF is part of **enabling voices of the sector to come together, and be heard**, to best inform wider recovery plans. **Sharing information**: guidance, case studies, and learnings will be key facet of this work.
- Importance of a **collaborative response** from the sector, no one organisation (regardless of size) can solve the current and continuing dilemmas.
- In forming a **route map to recovery** and how do we **reimagine the sector**? Now is the time for radical thinking.

Whatever we do will be informed by collective thinking around sustainable tourism, the climate change agenda, and ongoing issues raised by COVID-19.

### Initial Questions on CHERF/responses:

**Sarah Cameron, SenScot:** Keen to make stronger links between the heritage sector and the social enterprise support structure. The P4P ([Partnership for Procurement](#)) project has resources to be able to provide some support.

- *Connections shared and being taken forward by several organisations. Ongoing.*

**Andrew Hopetoun, Historic Houses** How do we keep the CHERF workshops relevant and focused, and make sure there are some strong and powerful actions?

- *Hopefully the ‘strands’ of CHERF gather those with similar interests/remits/practices to help enable relevant and focused information to be shared. HES’ involvement and support for CHERF, as well as the report which will go to the OPiT CEO Forum as the priority key item for discussion, should help to develop strong actions.*

**Susan O’Connor, Scottish Civic Trust,** Small-scale local organisations need reassurance. If the CHERF workshops are to represent the sector properly there must be a commitment from HES that what comes out of them will be taken forward, championed and supported even though it is not coming directly from them.

- *HES unfurloughed a member of staff to support CHERF directly during this initial phase. Teams across HES are feeding into the strands, and it is the intention for ongoing HES work to be shared with the sector as soon as is practicable – to best enable smaller organisations to be supported.*
- *CHERF is self-selecting all those who wish to contribute are welcome – as we’re looking at the Medium and Longer-Term aspects it can often be organisations which have more capacity for planning, and those with wider remits (or representative and collective bodies) who can feel most empowered to react to these calls for input; but that doesn’t mean the ask is limited to them.*

### CHERF will directly address the questions:

- What contribution can heritage make to the country’s recovery?
- What is the threat to heritage?

Solutions will need to be evidenced and the sharing of information should help to prevent the duplication of work – essential at a time when resources are stretched.

BEFS and partners are working to ensure information is shared across the UK and that appropriate guidance, advice, and research is available as widely as possible.

## Venues & Destinations

Whilst re-opening of venues and destinations is a more immediate concern for many organisations the related implications are, and will be, ongoing.

Whilst all speakers presented differing perspectives – a key takeaway was **planning and preparedness**: Whether that is planning for the worst scenarios of closing a charitable organisation, with the resultant redundancies and loss of collections and sites to the communities who cherish them; or the planning for re-opening and **knowing what your liabilities** are – and what is **viable both in terms of finance and resource**. **Practical reassessments of all operating procedures** to best fulfil the safest results for staff, and visitors.

- All speakers’ slides can be found [here](#).

[Bryan Robertson, COO at National Galleries Scotland \(NGS\);](#) and [David Mitchell Director of Conservation, Historic Environment Scotland \(HES\)](#) shared their experiences of planning for reopening.

### **Bryan Robertson, National Galleries Scotland**

- **Staff wellbeing** – make sure staff feel engaged and are shown appreciation for the work they have been doing in challenging times.
- **Collaboration** – National Museums Directors Council have been looking at creating a set of guidelines for reopening. Collaboration of people from across the UK: we can learn a lot from groups like these, as well as those ahead of us in reopening such as in Germany and America.
- **Front of house**: physically walked around every gallery to assess how to impose social distancing rules, sanitising stations, and access requirements.
- **Colleague safety**: A phased return, first bringing back people who will help us reopen, then safely switching between different teams working in the office on a weekly rotation.
- **Back of house**: looking at IT infrastructure, supporting people working from home and amending buildings so we have spaces where people can meet safely.
- New **CRM system for ticketing** so people can pre-book and we can control visitor numbers .
- Addressing **practicalities of construction and maintenance work**.
- **Consultation group**: including unions and staff so we can get feedback on what does and doesn't work.
- **Test trial**: we will test opening with staff and inviting Members.

It's potentially 2-4 years before we see the return of international visitors. Association of Leading Visitor Attractions [research](#) focuses on what visitors are looking for and what is going to reassure them. NGS want to make sure that not only are there method statements in place, but that they make a difference. Expect 20% of customers initially, planning to open to support those expectations.

### **David Mitchell, Director of Conservation, Historic Environment Scotland**

Closure of all 336 sites - significant impact as HES generates 50%+ income from sites and related activities.

- It's clear that organisations are not thinking about what COVID means for visitors and **liability**; all have a legal duty under the [Occupiers' Liability Act](#). HES developed **Compliance Assessment Framework** - it is based on what HSE would look at if considering an incident. Simple and Effective.

The Property resumption process is complicated:

***We need to be flexible, honest and adaptable in our approach and to move quickly, we don't know how this is going to pan out.*** There will be asks from politicians and the public as to why some sites are open over others. Looking at key drivers and reasons for opening – need to be considerate of communities ([such as at Luss](#)), who may not want influx of tourists.

- HES developed a policy of **minimum operating standards** to inform which sites reopen, and when.
- **Risk assessment** process is necessary at all sites as is **finance and resource viability**.
- **120 seasonal staff** were not taken on this year; need to consider where staffing is going to be needed, potentially at smaller sites.
- **Consent** is needed to do any physical interventions at sites.
- **HES will be publishing a range of guidance documents covering: minimum operating standards for properties and operations; guidance for staff; implementation plans for properties; risk management ;and audit trail procedures.** (Links will be circulated when available.)
- **Scenario modelling**– forecast for Autumn 2020 show huge increase in staycation and English tourism.
- **Capacity concern**: visitor preference might be for remote sites/ properties with open landscapes. Pre-COVID there already were concerns for some sites around increase in visitor numbers and changing weather patterns.
- **Backlog of checks and maintenance**. Lot of work to do to get places back in a state to be open and will be subject to scrutiny when we open. Longest closure since WWII

- **Role as a landlord;** we have staff living within properties who we have legal obligations to look after.

Long term impact of COVID on our estates and broader heritage environment; need to balance the want to be open, as it is our obligation and duty, with being safe.

David expressed that the team have done a fantastic job and are happy to share knowledge and expertise with the sector.

### **Emma Halford-Forbes, Industrial Museums Scotland Coordinator and Independent Consultant.**

CHERF got to hear more in relation to smaller, independent organisations and museums, and their challenges in relation to re-opening considerations. Whilst some museums get support from local or Scottish government, the vast majority comes from commercial enterprises such as retail, café, and admissions.

- **Many museums were not eligible for business support schemes.** Many will not reopen as it is not cost effective to invest in preparing for COVID related measures when considering an inevitably smaller audience.
- In these independent sites, plans are being put in place for alternative visitor experience. However, lots of **parts of sites cannot be reopened due to the impossibilities of physical distancing.**
- **Not a compelling business case for most museums to reopen.** Many who open will do so because they will make *marginally less* of a loss than if they were to stay closed.
- Independent museums are not confident that visitors will return. Many that do re-open **feel they must to try to open to avoid further financial losses and to safeguard jobs.**

Emergency grant funding from Museums Galleries Scotland (MGS) and the National Lottery Heritage Fund has been welcomed by independent museums, these grants have provided vital immediate support. The ongoing impact of measures such as social distancing, and national and international tourism reduction, means those grants are providing a short-term solution. Coronavirus Job Retention Scheme (CJRS) has given some breathing room too, but as it ends going into the winter season, many museums will have to close permanently.

- In closing, public museums will **lose trust** from the communities of interest and locality.
- **Museums hold collections on behalf of society**, that is their public purpose.
- Museums make a significant contribution to their places, Scotland's culture, and are a **key draw for tourism visitors.**

***Without direct intervention from major funders we are looking at a largescale meltdown of the nation's independent cultural sector.***

- There is a growing concern that a **bail out for the cultural sector will come too late** to be of use - after staff redundancies have taken place.
- **The impact on the sector will be irreversible:** putting collections at risk, endangering historic buildings, decimating staff, destroying team dynamics, and ending careers.
- Collections will need to be put in care of other museums such as National and Local authority's, using up vital resource.

We need to ensure that our museums continue the multifaceted roles they had at the turn of the year; caring for Nationally Significant collections, delivering community health and wellbeing, providing worthwhile employment and volunteering opportunities, and supporting the tourism sector.

- Museums can help rebuild communities post COVID-19 by continuing to contribute and support health and wellbeing.

### CHERF Advice shared - Questions/responses:

Is HES going to be able to provide any advice on consent for making any physical adaptations to historic buildings generally as well as sites? **Jo Robertson, Architectural Heritage Fund**

*Barbara Cummings (Heritage directorate) has said she is keen to work with us on guidance. There is an organisational desire that if we can share guidance and information then we will certainly do so.* **David Mitchell, Historic Environment Scotland**

The main challenge facing Historic Kilbride is where previously we have run a lot of events, we don't have the open space to do this within social distancing. **Seymour Adams, Friends of Kilbride**

*We need to manage expectations and be honest that some things just cannot happen. There has been a huge surge in digital activities from heritage organisations, but it is not the same as the real thing. If we do find solutions, we need to share.* **David Mitchell, Historic Environment Scotland**

In relation to liability – are you suggesting that if people visit a site and then contract COVID they are then able to sue? **Susan O'Connor, Scottish Civic Trust**

*The crux of the Scottish legislation is that anyone who manages, welcomes, or encourages people to visit their site has a duty to ensure the safety of that visitor. If the visitor can verify there has been a failure, then yes, they could potentially make a claim. The legal sector think that this may become the next 'no-win-no-fee' activity. The class action [suit at a ski resort around contracting COVID-19](#) is an example.* **David Mitchell, Historic Environment Scotland**

What forms do we have for integrating the lessons learned and best practices that are coming out of the cultural sector in Europe? **Ian Goodyear, Scottish Fisheries Museum Trust Ltd**

*Quite early on we were looking at what is happening across the world. I think there is an issue sharing anything that looks like guidance – we took the decision to share what we have been doing because we feel we have the role to do so, but there is an inherent liability there. It doesn't matter which heritage body you talk to around the world we are all essentially dealing with the same challenges. I think as a stepping off point BEFS should act as a forum for sharing information.* **David Mitchell, Historic Environment Scotland**

- **Please see links below for information sharing in relation to COVID19 and CHERF.**

### Questions were also raised in relation to:

- Volunteers – health/wellbeing/return – see CHERF3 23/06/2020 for further work in this area.

**Scottish Government Guidance (18/06/2020) on safe working in the tourism, hospitality, creative and house-moving sectors has been published and added to the table below.**

**CHERF** - Dates and links for future CHERF workshops, as well as workshop reports, slides from past presentation can all be found here: <https://www.befs.org.uk/policy-topics/covid-resilience-forum/>

**BEFS : Funding Information, Sector relevant Advice, and Sector Organisation updates in relation to COVID19:** <https://www.befs.org.uk/wp-content/uploads/2020/04/Covid19-Funding-Advice-Table-1.pdf>

### CHERF 1 - Key references and documents of note:

Dynamic List will be updated as more information is released in relation to Venues and Destination opening.

Organisation	Key Document
Association of Leading Visitor Attractions (ALVA)	ALVA attractions recovery tracker data. Shared via AIM <a href="https://www.aim-museums.co.uk/alva-attractions-recovery-tracker/">https://www.aim-museums.co.uk/alva-attractions-recovery-tracker/</a>
Association of Scottish Visitor Attractions (ASVA)	Latest news from Association of Scottish Visitor Attractions including links to sector research. <a href="https://www.asva.co.uk/news.php#newsid1201">https://www.asva.co.uk/news.php#newsid1201</a>
Cultural Policies	The Compendium of Cultural Policies & Trends monitors current developments regarding COVID-19 and the cultural field. <a href="https://www.culturalpolicies.net/covid-19/">https://www.culturalpolicies.net/covid-19/</a>
DCMS Cultural Renewal Taskforce	<a href="https://www.gov.uk/government/news/culture-secretary-announces-cultural-renewal-taskforce">https://www.gov.uk/government/news/culture-secretary-announces-cultural-renewal-taskforce</a>
Deloitte	Scottish Government have been examining <a href="#">Deloitte future scenarios</a>
Europeana	European Heritage Alliance Manifesto for Cultural Heritage: <a href="https://pro.europeana.eu/post/europe-day-manifesto-cultural-heritage-a-powerful-catalyst-for-the-future-of-europe">https://pro.europeana.eu/post/europe-day-manifesto-cultural-heritage-a-powerful-catalyst-for-the-future-of-europe</a>
Historic Environment Scotland	<a href="#">sector survey results</a>
Historic Environment Scotland – Policy Forum	HES is currently looking at the re-prioritisation of policy/guidance work to take into account the current circumstance. Welcome any suggestions about what the sector needs in the short term. Email: <a href="mailto:managingchange@HES.scot">managingchange@HES.scot</a> with any suggestions in relation to this.
Historic Environment Scotland	HES 6 month Action Plan - <a href="https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=10584acb-1c6f-43f4-8d5f-abc901111106">https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=10584acb-1c6f-43f4-8d5f-abc901111106</a>
National Museums Directors Council	<a href="https://www.nationalmuseums.org.uk/">https://www.nationalmuseums.org.uk/</a>
NEMO	Map that provides an easy-to-read overview of European countries' plans to reopen museums to the public. <a href="https://www.google.com/maps/d/viewer?mid=17-4zW7VeebnCetu54fNo-wukxY6KcrgG&amp;ll=52.493534879770834%2C14.278045999999982&amp;z=4">https://www.google.com/maps/d/viewer?mid=17-4zW7VeebnCetu54fNo-wukxY6KcrgG&amp;ll=52.493534879770834%2C14.278045999999982&amp;z=4</a>
Office for National Statistics	Figures for <a href="#">GDP drop</a>
OPIT Built Heritage Investment Group	Sustainable Investment Toolkit (draft): <a href="https://www.befs.org.uk/wp-content/uploads/2020/05/Draft-SIT-Complete-Pack.pdf">https://www.befs.org.uk/wp-content/uploads/2020/05/Draft-SIT-Complete-Pack.pdf</a> OPIT Built Heritage Investment Plan Diagram demonstrates the Value of the Historic Environment to the National Performance Framework
SCOTINFORM	<a href="http://www.scotinform.co.uk/cultural-survey/">http://www.scotinform.co.uk/cultural-survey/</a>
Scottish Government	<a href="#">Guidance for Tourism and Hospitality opening</a> . 18 June 2020
Scottish Government	National Cultural Partnership forming under Scotland's <a href="#">Culture Strategy</a>
Scottish Government Framework for decision making	<a href="https://admin.news.direct/wp-content/uploads/2020/05/covid-19-framework-decision-making-scotlands-route-map-through-out-crisis.pdf">https://admin.news.direct/wp-content/uploads/2020/05/covid-19-framework-decision-making-scotlands-route-map-through-out-crisis.pdf</a>
Scottish Tourism Alliance	<a href="https://scottishtourismalliance.co.uk/sta-update/">https://scottishtourismalliance.co.uk/sta-update/</a>
SEN Scot	P4P <a href="#">Partnership for Procurement</a> is all about collaboration and has resources to potentially provide support
UK Government Legislation	<a href="#">Occupiers Liability Act</a> , highlighted as significant around legal duty to visitors
Visit Scotland	<a href="#">Get Tourism Ready Scottish Government guidance in action plans</a>
Visit Scotland	<a href="#">Monitoring the Impact of COVID-19 on Tourism - research and reports.</a>
Visitor Safety Group	COVID-19 Recovery Planning Guidance WORKING PRACTICES FOR LANDOWNERS AND COUNTRYSIDE MANAGERS - May 2020 <a href="https://vscg.org/documents/uploads/covidguidance.pdf">https://vscg.org/documents/uploads/covidguidance.pdf</a>