

## Historic Environment Working Group (HEWG)

DRAFT Meeting note 22nd November 2023

HEWG

Time: 10am – 12pm

Date: 22nd November 2023

Venue: In person, The Crannie, Cranston Street Edinburgh

- **SPEAKER: Craig Mearns HES**

### Overview:

1. Welcome, Introductions and Apologies
2. Agree [previous meeting note](#) (available online) – all necessary actions completed, or to be updated on in BEFS Sector updates.
3. HEWG welcomes Craig Mearns, Director of Operations, HES  
Update on recent activity
4. **BEFS Sector Updates and Policy Updates**
  - General sector news and updates
  - BEFS connects: BEFS 20 and the SIT
  - Policy Consultations
  - Open Consultations
  - Our Past, Our Future Delivery update
5. **Organisational Updates from Members**

Name	Organisation	22 November 2023
Andrew McMaster	War Memorials Trust	Apologies
Ann Packard	RSA-MCICH	Apologies
Bill Pagan	CDT	Apologies
Judith Roebuck	CoS	Apologies
Sarah Pearce	HTN	Apologies
Scott McGibbon	Pvotal	Apologies
Tyler Lott	BEFS	Apologies
Diarmid Hearn	NTS	Apologies
Victoria Collison	HCS	Apologies
David Wood	Planning Aid Scotland	Apologies
Simon Gilmour	Society of Antiquaries of Scotland	Apologies
Barbara Cummins	Cockburn	Y
Andrew Hopetoun	HH	Apologies

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DJ Johnston-Smith	SCT	Y
Jenny Munro	RTPI	Y
Jo Robertson	AHF	Y
Jocelyn Cunliffe	AHSS	Y
Hannah Tweedie	SGLH	Y
John Lawson	ALGAO	Y
Lindsay Lennie	SCHT	Y
Kevin McClure	The Ridge	Apologies
Euan Leitch	SURF	Y

See BEFS [HEWG page](#) for past papers.

**Chair:** Ian Baxter, BEFS Vice-Chair

**BEFS attendees:** Ailsa Macfarlane, Jonna Meredith

### 1 Welcome, Introductions (necessary) and Apologies

Apologies and expected attendees above.

**2 Agree [previous meeting note](#)** (available online) – all necessary actions completed, or to be updated on in BEFS Sector updates.

Previous meeting note had the PDR 3 Consultation output from BEFS included after submission.

### 3 HEWG welcomes Craig Mearns, Director of Operations, HES

CM:

Here to give a sense of what's happening from an operations perspective.

People, process, training – implementing improvements.

Chief Exec introduced a reshaping initiative, new Operations directorate – brought together visitor ops and conservation of the monuments.

Regional construct (4 regions) plus Planning and Reporting, Technical Resources and High Level Masonry Inspecting Teams.

Significant improvements to Operations budget and workforce being grown.

Joint Estates Plan being developed to allow more coherent delivery of activity across the estate and with external agencies (CoS, NatureScot, NTS etc)

And evidence for progress:

**People :** Not enough yet but continuing to fill vacancies , about 140 vacancies across the country, and new roles in place. 50 more FT roles now in ops. Recruiting and application processes being improved, moving away from competency-based approach. t. Jan 2024 will see more changes.

Strategic Workforce Planning being conducted – reviewing skillsets and numbers needed.

Moving towards conservation projects being delivered by larger squads rather than small teams.

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Also using staff skillsets and qualifications more productively (no more stonemasons sweeping up leaves - as example), and introducing 2 new conservation roles (Conservation Technician and Landscape Technician) to undertake broader range of tasks  
Also a pay/grading review taking place. (Expected 2024 – after Easter.)

Also moving to 35h working week, come 1 April 24.  
Reducing opening hours – at 50+ properties.

#### **Process:**

Bureaucratic processes were in place, particularly around finance.

Finance management has been improved; 30% more budget provided this FY and all available at start of financial year rather than project money not being available until August (therefore too late for much of the 'conservation season').!

Was previously reactionary, now joint estates plan for 1<sup>st</sup> April on 2024

All Directorates input into estate wide 5yr plan.

Cultural Assets Directorates compliance activity work. Condition Survey has been updated, will be rolled out. Pushing for more user friendly compliance checks. 1 Compliance Regime is the goal.

RISK matrix drives activity – going to HES Board for final approval.

Moving away from SIGMA system, more agile. IT solution being considered - trial on graves. How to share? Expertise shared with LA on graveyards etc More can be shared in due course.

**High Level Masonry** issues: closure of 70 odd sites, tactile surveys necessary.

3 HLM teams, and trained – mandate, budget – slightly ahead of schedule in what has been achieved. Those inspection teams are now permanent and will remain as part of HES roles/team.

Coordinating conservation and inspection teams – same scaffolding etc – can also fix small issues at the same time.

130 sites still to inspect for the first time.

Many positive effects of high-level masonry, particularly in securing additional funding for conservation.

Rock risk management – Holyrood Park and Castle (and much more across the estate).

Not a standard for Rock Risk Management (international or otherwise).

Ops Directorate will take the lead on policy and delivery of rock risk management from 1 Apr 24. New role has been created for an In House Geotech Engineer, who will be the specialist lead on this. Recruiting shortly. Expect more activity post-Easter.

Reorganisation: Visitor and Community team, looking at orgs next door/nearby, reaching out more into the community to explain and inform as to why some sites have been closed and the process of maintenance. Specific initiatives in some places.

#### **Equipment:**

Looking at NetZero targets and Climate Action plan. Boilers, EV / vehicles etc.

#### **Training:**

Swathe of works managers with little/no recent conservation training, formally.

Not necessarily the best way – or give people the chance to work best.

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New training packages in place for operational managers

**Planning, Surveying & Recording the Condition of Built Assets for Conservation** - course for works managers – all being put through this.

Architects and surveyors also to take the course. This does have recognition of prior learning, but evidence needs to be contemporary evidence.

Focus on WORKS MANAGERS in particular – architects/surveyors all competent, rolled out further in due course.

What next: **Properties In Care strategy** coming out in 2024.

Cannot value all equally and how to focus efforts and attention on the right bits.

Looking at the whole elements of significance, cultural / economy... wide range of factors.

Good spin offs – deliver site management plans – over next 5yrs.

Much more structured, a positive process even if some parts might be uncomfortable.

Cannot ignore the investment needed in the estate. Eg Edinburgh Castle, update the loos etc. The unsexy things need focus.

New focus on fundraising across the diaspora, including new ways of funding projects.

Questions from the room included:

Q: survey input needs to be user friendly for all IT skill levels.

A: Comprehensive and user-friendly surveys.

Q: Can HES share with the sector re surveys.

A: HES does not want to monopolise best practice.

Q: ENGINE SHED Focus on the delivery of experience and content for children. Outreach and courses? Any update on those returning.

A: Not Craig's work, but will take this away. Room also suggested many courses are now running again.

CM was clear he was happy to be contact by the group – email here: Craig Mearns [craig.mearns@hes.scot](mailto:craig.mearns@hes.scot)

HEWG Chair thanked Craig for his time, and CM left the meeting.

#### 4 BEFS Sector Updates and Policy Updates

- General sector news and updates
- BEFS connects: BEFS 20 and the SIT

**INVITATION:** BEFS Board and Team are delighted to invite you to a very special *BEFS Connects* as we celebrate our 20<sup>th</sup> year working with, and on behalf, of the sector. Join us on the evening of 6<sup>th</sup> December to raise a toast to two decades of collaboration.

**Date and time:** Wednesday 6<sup>th</sup> December, 6pm – 8pm

**Venue:** Dovecote Studios, Infirmary Street, Edinburgh

**RSVP:** By 16<sup>th</sup> November to [hjohnson@befsf.org.uk](mailto:hjohnson@befsf.org.uk)

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### SIT LAUNCH: Next week.

A new Sustainable Investment Tool (SIT) will be launched at the end of the month, which aims to enable visualisation around decision making for projects and investment in built heritage. It will help organisations as well as community and interest groups with heritage assets to explore sustainability, enabling greater resilience.

The SIT is published by Built Environment Forum Scotland (BEFS), the third sector intermediary for the existing built environment, with the support of Historic Environment Scotland, on behalf of the Our Place in Time - Built Heritage Investment Group (BHIG) and now supporting the new strategy for Scotland's historic environment - Our Past, Our Future.

Using the SIT will help support the decision-making process by demonstrating the Economic, Cultural, Environmental and Social outcomes of potential investment in built heritage across a range of categories. The project to develop the SIT began in recognition of the difficult decisions to be made for our existing built environment, in the face of economic and climatic impacts.

The structure it provides can aid communication on the value heritage assets (and their related projects) can bring across a wide range of indicators – ultimately broadening the understanding of heritage value and heritage potential. It is not however intended to be a definitive solution to prioritisation and investment decisions.

The SIT is intended to be useful across a wide range of users, including: community groups, asset holders, funders and practitioners. It will help start conversations about wider value, advocating for the benefits heritage assets deliver, and demonstrating how built heritage contributes to positive outcomes for people across wellbeing, net zero and the economy.

BEFS Director, Ailsa Macfarlane *'This has been a truly collaborative piece of work, created through an iterative process of consultation and discussion with input from across the heritage sector and beyond, with discussions around difficult decisions as the starting point. We would like to thank all those who engaged and brought their expertise, knowledge and enthusiasm to the many conversations and consultations.'*

### Reinforced Autoclaved Aerated Concrete – update, BEFS Evidence

Aware of the significant capacity across building/estates teams and the potential for future budgetary impacts. BEFS raised the issues around existing building data – and how in future, better info could significantly reduce resource expenditure in this area. BEFS gave evidence.

**Historic Environment - SIP refresh** – aims and ongoing activity : Skills Investment Plan for the Historic Environment – BEFS was running a session in relation to Architecture, Engineering, Planning and Surveying – all with a heritage conservation focus.

Significant acknowledgement from across the sector that supporting Skill, CPD and development within LAs was seen as key.

- **Our Past, Our Future**
- Giving evidence tomorrow – delivery challenges, no surprises.
- **Delivery update**

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New team recruited, BEFS has met with Eleanor Styles the Programme Coordinator and Marjorie Perotto, Data Analyst. Programme manager Jilly Burns just started, meeting early December. As appropriate: Invitations to SHEF out, Save the Date 14:00 on Wednesday 7 February 2024, at The Barracks in Stirling.

- Policy Consultations – **submitted can see all online.**

#### **MANDATORY TRAINING ON PLANNING FOR ELECTED MEMBERS (26/10/2023)**

BEFS fully supports the proposal for mandatory training on planning for elected members. We would consider that good decision making for people and places recognises the National Planning Framework 4 (NPF4) view that *‘Scotland’s rich heritage, culture and outstanding environment are national assets which support our economy, identity, health and wellbeing’*, delivering against the spatial principles within NPF4.

#### **ENHANCING THE ACCESSIBILITY, ADAPTABILITY AND USABILITY OF SCOTLAND’S HOMES (19/10/2023)**

BEFS statement supports measures that increase the accessibility and usability of Scotland’s dwellings, improving quality of life and enabling people to stay in their homes for longer – positively contributing to the continued use and occupancy of existing buildings. For any interventions and decisions which impact on traditionally constructed homes and the historic environment, BEFS points to existing guidance on the adaptation of historic or designated properties.

#### **ENERGY PERFORMANCE CERTIFICATE REFORM (16/10/2023)**

BEFS broadly agrees with the metrics proposed and supports the drive to improve the energy performance of Scotland’s homes, including traditionally built properties. The inefficiencies of the EPC in relation to traditional buildings has been raised previously and BEFS would reiterate that the existing built environment is the most sustainable building resource we have, through the embodied energy present and the potential for adaptation and reuse. Assessed appropriately our existing built environment presents an enormous opportunity to provide climate solutions. As such we are pleased to see greater consideration given to fabric within the proposals but would hope that inclusion of a Fabric Rating could and should positively contribute to a fabric first and maintenance approach to Scotland’s buildings, *alongside* appropriate retrofit.

#### **VISITOR LEVY BILL – CALL FOR VIEWS (15/09/2023)**

In response to this call for views on the Visitor Levy Bill, BEFS statement reiterates previous comments given on this topic, and continues to emphasize the central role that the historic environment specifically – and the built environment more widely – play as a direct contributor to the tourism offer of Scotland. BEFS notes that the historic environment can be directly impacted by tourism; the economic, cultural, environmental, and social value of Scotland’s places, sites, and landscapes being appreciated by visitors comes at a price. As such, any legislation and ensuing revenue must be part of a wider conversation towards a successful management plan to simultaneously celebrate and protect our natural and built heritage, whilst ensuring quality of life for Scotland’s communities.

#### **EFFECTIVE COMMUNITY ENGAGEMENT IN LOCAL DEVELOPMENT PLANNING GUIDANCE (13/09/2023)**

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BEFS response welcomes this guidance on effective community engagement in local development planning, for communities and local authorities, and supports all moves towards clarity on how planning authorities can comply with their legal duties to engage with the public when preparing their local development plans. Questions around delivery – in particular around capacity of local planning authorities’ duties regarding monitoring and reporting – remain.

### CIRCULAR ECONOMY (SCOTLAND) BILL – CALL FOR VIEWS (01/09/2023)

BEFS response reiterates the important role that the existing built and historic environment can and should play in a sustainable circular economy.

### PERMITTED DEVELOPMENT RIGHTS REVIEW – PHASE 3 (23/08/2023)

BEFS recognises the intentions of the proposed changes, towards easing pressure on planning teams to deliver ambitious net zero targets, and to enable easier implementation of climate beneficial solutions within planning. This response urges caution however, as unintended consequences of some of the proposed exemptions should be considered, in particular around the proposals for replacement windows, solar panels and potential impacts on conservation areas and other designations. **Response followed input from Members at previous HEWG.**

- **Open Consultations**

- The Agricultural and Rural Communities (Scotland) Bill Consultation

- The Rural Affairs and Islands Committee

- This consultation seeks input on the Bill which would be used as a framework for Scottish ministers to better develop the support that farming and rural communities need. The committee planning to take oral evidence from late November through to early February before reporting to the Scottish Parliament with its recommendations in spring 2024.

- **Closes 24 November 2023**

- Call for Ideas on Planning System Ambitions

- The Improvement Service / Scottish Government

- This consultation seeks to obtain the views on proposed increases to the building warrant fees required to deliver change to strengthen the building standards system and the development of a new building warrant fees model in Scotland.

- **Closes 30 November 2023**

- \*NEW\* Housing (Cladding Remediation) (Scotland) Bill

- The Local Government, Housing and Planning Committee has launched a consultation on the Housing (Cladding Remediation) (Scotland) Bill.

- **Closes 8 December 2023**

- Proposed Desecration of War Memorials (Prevention) (Scotland) Bill

- Scottish Parliament

- This consultation relates to a draft proposal lodged as the first stage in the process of introducing a Member’s Bill in the Scottish Parliament, to ensure that war memorials in

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Scotland receive the protection that they deserve by creating the specific offence of desecration of a war memorial.

**Closes 19 December 2023**

### Outline Strategic Plan for Holyrood Park

Historic Environment Scotland (HES)

This survey on the Outline Strategic Plan for Holyrood Park will gather public views to help deliver a new future for the Park that reflects community aspirations, the needs of the City and the inherent value and sensitivity of Holyrood Park.

**Closes 19 December 2023**

### National Parks in Scotland

Scottish Government

The Scottish Government invites individuals, communities and organisations to develop and submit formal nominations for their area to become Scotland's next National Park.

**Closes 29 February 2024**

## 5 Organisational Updates from Members

### **BC: COCKBURN**

Covid lull affected the Cockburn's own activity.

Now developing a financial strategy for a Sustainable Future. Will be recruiting.

2025 – 150yrs of the Cockburn, want a more regular programme and lead the issues, conference etc. PROMOTE those roles. One of the new posts will be involved with City Engagement.

### **DJ: SCT**

Herald Today - new article today.

CoS not grasping the nettle.

Graves an issue:

Morham kirk, 9 bodies, moving them... **wider issue/ talk to JL ALGAO**

According to CoS the corpses above ground are items belonging to the congregation. If it's 150 years you can just move it!

Question/Comment from JL: corpses become archaeology when they exit the churches.

After 25 years non-family can move the body further down and bury others above, repurpose the grave. Issues around cemetery management generally, what happens to graves and bodies, monuments and memorials. Who and what is important to whom? CoS issues around the right to be buried inside a church with a family line.

LA – law is there, ALGAO concerns about reburial, etc on the working group.

LA - Each site needs a plan. Future significance issue too.

### **LL: SCHAT**

Very busy and exciting year, 3 new members of staff. Heritage trainee, retrofit etc

Tried for a grants officer twice – then went heritage trainee (as HTN had a great response). Real demand out there.

Inspections booked-up until March.

Trialling the retrofit inspections. FABRIC first. Then energy retrofit.



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Bespoke advice being given. Dispersing small grants from shared prosperity fund.

Light touch small interventions... Working with Moses Jenkins at HES.

Launching officially in January 2024.

Under One Roof Event yesterday.

Outreach on Dementia etc and reminiscence boxes.

Women in construction event too.

All city Heritage trusts – under review by HES. Will know more in early 2024. All funded until March 2026.

Supporting Heritage strategy for Stirling.

#### JC: AHSS

Magazine published in the Autumn with a sports building theme. Also included a Spotlight piece on Stained-glass at Risk following on from pieces on churches and organs in the previous magazine.

People consider different things important within churches. Very complex.

SAVE has made the running for saving Ayr Station Hotel, after fires, commissioning structural reports etc. JC was an observer at a Scottish Parliament roundtable with several MSPs and other interested groups (but Network Rail not represented). Ayr citizens want the hotel taken down, considering it an eyesore and not liking road and rail disruption. JC referred to Tower Mill in Hawick which was derelict and an eyesore but after renovation became well liked. The AHSS would like to see Ayr Station Hotel retained and re-purposed.

It was pointed out that Ayr got levelling up funding; does it cover that area?

#### JR:AHF

Engineering at Ayr funded by AHF – prior to latest fire.

25% of enquiries are from churches.

If AHF gave 10k in full to churches – could decimate their funding pool. Need to be more strategic internally.

Can anything be slowed down? Law dept in CoS has to be working AT SPEED.

Community groups – if they can make progress, then it's a big step forward, but period of exclusivity (if granted) – when/where group interested can be 6months – a short time to make any changes.

AHF funding to March 2025 – working on impact in Scotland report for AHF to HES et al

#### JM: RTPI

New director, Dr Caroline Brown (from HWatt Uni).

National Planning Improvement Champion call for ideas. (Improvement Service)

Housebuilding study on land-banking report due to be released.

Updating Planning Resourcing document for 2023 – published next month. (Headline = Continued decline.)

Planning fee increase, when adjusted for inflation, doesn't quite impact on cost-recovery as hoped.

- Anniversary – 20yrs of young planners network. Monica Lennon MSP (host)

*ALGAO question:* work with but not in the planning team... internal consultancy, how does RTPI pick that up in their Resourcing report?

**NOTE: JL – to talk to JM at RTPI**

SG workshop on resourcing planning – Caroline present to represent RTPI

RTPI held their planning excellence awards

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### EL: SURF

25<sup>th</sup> anniversary of SURF AWARDS

Community led stuff, and deprivation led some components heritage but not the driver.

Board recruitment, 4 recommendations for new appointees. 12 applications.

Peterhead, Girvan – Community reps from Girvan to the Ridge. Knowledge exchange.

Peterhead – money from heritage scheme, historic buildings back into use.

Wider regeneration – students research, looking at capital/revenue funding - revenue needed! Then looking at capacity of communities to look at the ownership.

SURF are agnostic on the principle, but can see community owners need revenue to deliver what – is possible.

**HT: SGLH** – new Chair is Matt Benians; Hannah acting Vice Chair.

Ongoing volunteer project in East Lothian, recording project at regional/local level, not on the inventory – forming a tool kit to be applied elsewhere. First reports coming through.

### ALGAO: JL

Due to - Levelling Up Act – HERs statutory in England. Statutory in Wales NI too.

2016 Burial Act – function; but in planning (non-statutory).

State of the Nation ALGAO. 50% reduction in archaeologists since 2010. JL thinks it's going to become worse – retiring people. Staff resourcing is 'flatlining'. In the 1990s the local councils took over archaeology work. About 5000 archaeologists right now – positions cut by the councils. Gone from 20-something spots to about 3 or 4 spots.

LL Q: Fewer people coming through. Private sector work.

Fewer UK wide -but within LA the real issues within Planning authorities, cut or not filled, wider struggle to replace, staffing freeze, hard to recruit.

### IB - Historic Houses:

50<sup>th</sup> anniversary. AGM last week.

### IB - HES:

Heritage Assets committee – 2 meetings – sub-committee of the Board. Issue discussed within the subcommittee: how are heritage assets going to contribute to sustainability within the organization more broadly?

- PIC strategy – a Board strategy. Released in due course.
- Archives service – how to make it more visible – use Local Authority HERs etc
- Major IT issue PASTMAP etc
- Q from JC – around, Dictionary of Scottish Architects – answered within the room - part of the TROVE project.

### Update from Diarmid Hearn - NTS – written:

With apologies from BEFS for not sharing at the meeting – time was a little pushed.

- Scottish Parliament - we're planning to have stall in the Garden Lobby for the 5<sup>th</sup> -7<sup>th</sup> of December as a chance to meet MSPs and talk about our new strategy (also hope to have some archaeological artefacts and tablet (the edible kind).

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- Climate change adaptation - with our new climate change officer, and a new risk officer, we're making good progress on assessing climate change risks. However, we're also finding that there is no substitute for site visits to understand what adaptation measures are needed.
- Climate change and new build - we're looking to replace (or adapt) our visitor centre at Glenfinnan. This is likely to be a useful proving ground for reuse and for establishing energy standards (including emissions over its lifetime) for any new build that we undertake.

**Update from Bill Pagan CUPAR –be shared in the meeting notes.**

### BEFS HEWG 23 NOVEMBER 2023 – CUPAR UPDATE

From Bill Pagan, Chair of Cupar Development Trust, past Trustee of BEFS

*A reminder to HEWG members: CDT was formed as the result of a visit to Cupar in July 2014 by Cliff Hague, Euan Leitch, and Amanda Sherington, and of the report which followed their visit, one of eight in the BEFS' Small Towns project. The Report covered both community and spatial needs.*

CDT is trying to make the most of the Community Empowerment Act (Scotland) 2015, and the Planning (Scotland) Act 2019. I have previously made the strong representation that neither statute will have value unless adequate resources of both cash and people are made available to local communities.

CDT is more than half way through three-year funding from SCP, managed by DTAS, to pay the costs of one FTE. CDT has split the funding between a Development Officer and an Admin Officer. This funding cannot be extended beyond 31 March 2025.

In this calendar year, CDT has completed a Community Action Plan for the whole of "Cupar & Country" – the wide catchment area of Cupar's Bell Baxter High School - with consultants Community Enterprise, funded through DTAS. The CAP is about to be published. This has permitted CDT to prepare in turn a Local Place Plan to get markers down with Fife Council for spatial requirements over future decades. This will be submitted by the end of January. Simultaneously, encouraged by CDT and with generous private funding, three of Cupar's culture and heritage SCIOs commissioned a team, led by Jura Consultants, to produce a Scoping Study for a substantial Arts & Culture Hub. The Study has been delivered to the three SCIOs this week. Finally, on 29 November, the last consultation process, a Youth Charrette, funded by various pockets from Fife Council, will take place in BBHS. Thanks to the fundings received, backed up by huge volunteer effort, and by CuparNow, the UK's unique Digital Improvement District, impressive consultation outcomes were achieved.

A survey was distributed both on paper and electronically, receiving 448 responses, on behalf of 1545 people; 90 people attended drop-in events; 29 one-to-one interviews were held with organisations, then 28 people attended a stakeholder summit, representing at least 18 groups.

Updates on the process were sent electronically to 2,000 subscribers by CuparNow, including over 200 businesses and over 400 community groups' contacts.

I report these statistics merely to give an idea of the scale of engagement CDT felt necessary to provide the evidence of community demand. This evidence will be deployed both when seeking resources and other support from Fife Council, and when applying to national and private sources of project funding.

Finally, I have mentioned before the challenges Cupar, and North East Fife generally, face when attempting to convince Fife Council that there is substantial deprivation, especially rural deprivation, in the area Cupar serves. Two Cupar postcodes are on SIMD, and – despite superficial appearances - DWP figures from 2020 show rates of children living in absolute and relative low-income families are

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almost double the national averages. But it is still a struggle to attract the Council's attention to what they see as a relatively wealthy - and motivated - area.

My conclusion: the local community, having made use of the two statutes, needs to be resolute through the next phases, in particular in raising funds to deliver the community's clearly expressed aspirations.

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**Next HEWG:**

22<sup>nd</sup> February 2024

10am – 12pm online

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