



Historic Scotland

CORPORATE PLAN

2008-11

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1

POLICY CONTEXT —

THE NATIONAL PERFORMANCE FRAMEWORK

- 1.1 This chapter summarises the policy context within which Historic Scotland will operate over the period 2008-11 and how it plans to contribute to the Scottish Government's National Performance Framework.
- 1.2 All functions performed by the Agency, which lies within the portfolio of the Minister for Europe, External Affairs and Culture, are carried out on behalf of Scottish Ministers. The Framework Document for the Agency requires us to prepare a corporate plan for approval by Scottish Ministers. This Corporate Plan covers the 3 years beginning on 1 April 2008. It has been approved by the Minister. The Agency will report annually on progress against the Corporate Plan.

NATIONAL PERFORMANCE FRAMEWORK

- 1.3 In November 2007 the Scottish Government adopted **The National Performance Framework**. At the apex of the Framework is the Purpose, which is:
- “To focus government and public services on creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable growth.”*
- 1.4 Beneath the purpose sit 7 **Purpose Targets**. Those of particular relevance to Historic Scotland are:
- “To raise the GDP growth rate to the UK level by 2011”; and
“To reduce emissions by 80% by 2050”.*
- 1.5 In addition, the Framework lists 15 **National Outcomes**, the most relevant of which to Historic Scotland are:
- We value and enjoy our built and natural environment and protect and enhance it for future generations;
 - We live in well-designed, sustainable places where we are able to access the amenities and services we need;
 - We take pride in a strong, fair and inclusive national identity;
 - We live in a Scotland which is the most attractive place for doing business in Europe;
 - Our public services are high quality, continually improving, efficient and responsive to local people's needs; and
 - We realise our full economic potential with more and better employment opportunities for our people.

HISTORIC SCOTLAND ACTIVITY IN SUPPORT OF THE NATIONAL PERFORMANCE FRAMEWORK

- 1.6 To help raise the **GDP growth rate** we will continue to drive up income at our properties by improving marketing, service and sales in our shops and by working in partnership to develop new products like the Homecoming Pass for 2009. We plan to raise income by 19 per cent over the period of the plan. Most of this growth will come through our key attractions of Edinburgh, Stirling and Urquhart Castles. Our investment in new ticketing, visitor facilities and interpretation will enhance the visitor experience and enhance Scotland's tourism offer, contributing to the wider growth of tourism. By continuing to fund grant schemes in towns and city centres we will enhance the quality of local commercial areas.
- 1.7 Our most important contribution to **reducing emissions** will come through our technical knowledge. Reducing emissions from the traditional building stock is one of the main challenges, and by developing our understanding of the energy performance of traditional buildings we will help to ensure that decisions about energy saving measures, and about demolition and replacement, are based on sound assessments of likely carbon impact. Through our advice and our grants schemes we will continue to ensure the continuing sustainable use of important existing buildings. We will also extend our measures to reduce emissions from our own operations, with a planned review of energy management at our Properties in Care and our offices and workshops, and ongoing review of staff travel as part of wider efficiency measures.
- 1.8 To help people **value and enjoy** our built environment we will improve the interpretation we offer at our properties. We will ensure that our interpretation is based on a sound understanding of the sites and is delivered to a wide range of audiences through a variety of accessible media - including audio tours, improved signage and site presentation as well as attractive and up-to-date guidebooks. We will continue to provide a range of colourful events to give visitors a lively day out. We will offer a wider selection of educational activities, particularly for school parties but also for other groups. We will work with local communities to build closer links between them and their local monuments. We will share the knowledge we gain through our listing programmes in publications and exhibitions in the areas concerned. Through our technical publications and associated outreach activity we will give people a better understanding of the materials and techniques which give our historic buildings their character.
- 1.9 We have a direct responsibility to **protect and enhance** the properties in our care, which we will do through systematic monitoring and carefully prioritised investment in conservation. Our major investment in the Palace at Stirling Castle will enhance it for future generations. We will continue to identify through listing and scheduling those assets we consider merit statutory protection. We will work more effectively with local authorities to ensure that decisions on proposals to alter listed buildings are based on a proper understanding of the building and of the impact of the proposals, and are taken without undue delay. We will continue to work with others in the sector to improve the supply of suitable materials and the availability of suitable skills.

- 1.10 All Scotland's city centres and most of its towns and villages have kept much of their historic character and will, if properly managed, be **well-designed and sustainable places**. Through our professional advice and guidance we will assist councils and developers to improve the quality of alterations to existing buildings and the quality of new buildings in these historic settings. Many conservation areas in our towns will benefit from support under our Conservation Area Regeneration Schemes. We will continue to target our grant schemes to ensure they are prioritised to deal with cases of greatest demonstrable need.
- 1.11 Sites such as Edinburgh Castle, Dunadd, Skara Brae and Arbroath Abbey are inextricably identified with Scotland. The stories which our visitors learn at our properties make up an important part of our **national identity**. We will build on the example of our new website for Edinburgh Castle, which introduces it to a worldwide audience, by developing similar sites for some of our other leading properties. We will continue to make our major properties available for national events and international gatherings which showcase Scotland to different audiences.
- 1.12 An effective planning system will help Scotland be an **attractive place for doing business**. Through continuing professional development we will equip our staff to contribute more effectively to discussion of development proposals, and to local plans. We will speed up our responses to consultations on planning applications, and maintain our rapid processing of most listed building applications (we deal with more than 97 per cent within 28 days). We will support Ministers in completing the Scottish Historic Environment Policy series, which gives clear and up-to-date guidance to planning authorities and developers on the main aspects of the historic environment.
- 1.13 Customer surveys show that we offer **high quality services** to visitors at our properties and we will enhance that quality in the years ahead seeking to achieve a minimum of 4 or 5 star VisitScotland ratings at the majority of our Properties in Care. We will also widen the scope of our "Mystery Visit" programme, incorporating the commercial team as well as our front-line staff. Across the Agency we will maintain a programme of continuous improvement, with a series of best value reviews and business 'health checks' of our main areas of business. We will continue to collaborate closely with other public bodies such as Scottish Natural Heritage, Forestry Commission (Scotland) and the Royal Commission on Ancient and Historical Monuments of Scotland, the Rural Payments and Inspections Directorate, Visit Scotland, Architecture + Design Scotland, the National Trust for Scotland, and the Heritage Lottery Fund. We are well advanced in our plans to deliver the efficiency savings required to meet the Government's target.
- 1.14 Curriculum for Excellence, which is the ongoing review of the curriculum for children and young people aged 3-18 and which represents the biggest reform of Scottish education for a generation, places emphasis on Scottish contexts, history and culture and Scotland's place in the world. Through social studies, including the study of history, children and young people develop their understanding of the world by learning about other people and their values, in different times, places and circumstances, and how their environment has been shaped. Our educational and outreach activities contribute to this development and ensure **our children have the best start in life and are ready to succeed**.

HISTORIC SCOTLAND ACTIVITY IN SUPPORT OF OTHER GOVERNMENT POLICY

- 1.15 Various other strands of Government policy, which are not explicit in the National Performance Framework, have important implications for the work of Historic Scotland. The Government are committed to reducing central direction of the activities of **local government** and giving councils greater discretion within Single Outcome Agreements. They have endorsed the aim set for the **tourism** industry in the Tourism Framework for Change in 2005 of a 50% real increase in revenue by 2015, while emphasising that this must not be at the expense of quality. **Planning** is fundamental in shaping our towns, cities and rural areas. Work is underway to implement the most significant modernisation of Scotland's planning system for over 60 years. The focus is on creating a modern planning system that is efficient, inclusive, fit for purpose and contributes to increasing sustainable economic growth. The Government's **architecture** policy seeks to focus on the delivery of better-designed outcomes; promote a positive view of our architectural culture and heritage; and promote a sustainable and inclusive approach to our built environment. Finally the Government have set annual targets of 2% cash-releasing **efficiency** savings for all public bodies.

2

EXTERNAL CONTEXT

- 2.1 This chapter sets out the factors in the external environment which impact on Historic Scotland activity.
- 2.2 As compared with the steady growth in the UK and world economies over the last 3 years, the current forecasts are for **slower growth**, with particular uncertainties in the UK property market. This seems likely to affect the number of proposals for adaptation of listed buildings, and the rate of progress on some schemes already approved, although there are few clear signs at present. The reduction of around a third in the funding available to the Heritage Lottery Fund over the plan period, as compared with the last 3 years, will also constrain the number of large conservation and repair schemes.
- 2.3 The number of overseas **tourists** visiting Scotland has grown over recent years while the number of tourists from the rest of the UK and the number of Scots holidaying at home has declined. These trends seem likely to continue. There is as yet no evidence of numbers of overseas visitors being affected by the carbon impact of flying. Overall annual visits to Historic Scotland paying sites have been broadly static at around 3 million for the past decade. With strong competition from other new and refurbished attractions and other leisure activities, numbers of visitors seem likely to grow very slowly, although the special events planned to mark the Year of Homecoming in 2009 should provide a boost.
- 2.4 Reliable information about the **state of the historic environment** is scarce, but progress on gathering data is being made through the Scottish Historic Environment Audit (see 4.7). Historic Scotland monitors the condition of the properties in its care, which is generally good, and the condition of scheduled monuments, most of which are also in good condition. Work is in hand to build up a consistent picture of the degree of risk to Category A-listed buildings, but at the moment it is not possible to generalise about this. A survey carried out by the Scottish Stone Liaison Group for Scottish Enterprise Glasgow in 2006 showed that extensive repairs were needed to the stonework on many prominent older buildings in the city, and that much previous repair work would not prove effective. Similar surveys elsewhere are likely to reveal a similar picture.
- 2.5 Supplies of **materials** for conservation and repair work are in some cases difficult to source. Scottish slate is a particular problem, since the last quarry closed half a century ago, and many building stones are difficult to match. A study of **skill needs** by the National Heritage Training Group in 2007 showed that skilled craftspeople were difficult to find, especially stonemasons, and that knowledge gaps were evident in specifications by architects and surveyors for traditional building work.
- 2.6 The possible impacts of **climate change** on the historic environment have

been much discussed in recent years. In Scotland the most obvious impacts seem likely to come from increased winter rainfall and increasingly frequent storms, as well as the promotion of enhanced energy efficiency in historic buildings. How severe these impacts will be is difficult at this stage to assess, but the loss of significant areas of coastline rich in archaeological remains in some recent storms in the Western Isles is an indication of the possible scale of the problem.

- 2.7 **Attitudes** to historic sites in Scotland are generally very positive. In a survey commissioned in November 2006, 94% of those questioned agreed that historic features were an important part of the identity of a village, town or city. 92% agreed that historic sites should be identified and protected. 95% agreed that it was important that children were able to visit historic sites. However, 22% were opposed to public money being spent on assisting the renovation and repair of historic sites.

3

FRAMEWORK DOCUMENT AIMS, ACTIVITIES AND RESOURCES

- 3.1 This chapter sets out the Historic Scotland Framework Document aims, the main activities in support them and the resources allocated to Historic Scotland to deliver them.
- 3.2 The broad direction for Historic Scotland and its governance arrangements are defined by the Minister in the Framework Document for the Agency, which was revised in April 2008. In the light of the National Performance Framework the Minister set the following aims for Historic Scotland:
- To care for, protect and enhance the historic environment;
 - To secure greater economic benefits from the historic environment; and
 - To help people value, understand and enjoy the historic environment.
- 3.3 Some of the activities below contribute to more than one aim – for example, major investment at Stirling Castle will contribute to the second aim as well as the first.

Aim	Main Activities
1.To care for, protect and enhance the historic environment	<p>Systematic monitoring and carefully prioritised investment in conservation at properties in care.</p> <p>Major investment in the Palace at Stirling Castle to enhance it for future generations.</p> <p>Identify through listing and scheduling those assets we consider merit statutory protection.</p> <p>Work more effectively with local authorities to ensure that decisions on proposals to alter listed buildings are based on a proper understanding of the building and of the impact of the proposals, and are taken without undue delay.</p> <p>Continue to work with others in the sector to improve the supply of suitable materials and the availability of suitable skills.</p>
2.To secure greater economic benefits from the historic environment	<p>Increase income at our properties by improving marketing, service and sales in our shops and by working in partnership to develop new products like the Homecoming Pass for 2009.</p> <p>Investment in new facilities to enhance the visitor experience and Scotland’s tourism offer, contributing to the wider growth of tourism.</p> <p>By funding grant schemes in towns and city centres we will promote long-term sustainability by enhancing the quality of commercial areas and reinforcing historic links with local communities.</p>

<p>3. To help people value, understand and enjoy the historic environment</p>	<p>Improve the interpretation we offer at our properties based on a sound understanding of the sites and delivered to a wide range of audiences through a variety of accessible media – including audio tours, improved signage and site presentation as well as attractive and up-to-date guidebooks.</p> <p>Provide a range of colourful events to give visitors a lively day out and continue with the ‘free weekend’.</p> <p>Offer a wider selection of educational activities, particularly for school parties but also for a wide range of other groups.</p> <p>Work with local communities to build closer links between them and their local monuments and the historic environment in general.</p> <p>Share the knowledge we gain through our listing programmes in publications and exhibitions in the areas concerned.</p> <p>Give people a better understanding of the materials and techniques which give our historic buildings their character through our technical publications and associated outreach activity.</p> <p>Promote a wider understanding of the superior energy efficiency of many historic buildings, and the ways in which their performance can be enhanced without damaging the integrity of their fabric or setting.</p>
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3.4 **The Scottish Budget Spending Review 2007** allocated resources for the financial years 2008-09, 2009-10 and 2010-11. The provision allocated to Historic Scotland over the Plan period is:

	2008-09 £ (m)	2009-10 £ (m)	2010-11 £ (m)
Historic Scotland Allocation	48.029	49.279	50.279

3.5 Historic Scotland generates **income** in support of our activities, mainly from admission charges, shops, events and functions at the properties we manage. For planning purposes our estimated income is set out in the table below. If income falls short of forecast, some activities will have to be curtailed. On the other hand, if income exceeds forecast, we may be able to carry out other important work which cannot be accommodated within this Plan.

	2008-09 £ (m)	2009-10 £ (m)	2010-11 £ (m)
Historic Scotland Forecast Income	26.267	28.659	30.124

TOTAL FUNDING AVAILABLE

	2008-09 £ (m)	2009-10 £ (m)	2010-11 £ (m)
Total Forecast Funding	74.296	77.938	80.403

BREAKDOWN BY AGENCY GROUP

	2008-09 £ (m)	2009-10 £ (m)	2010-11 £ (m)
Policy Group	15.512	15.862	15.969
The Inspectorate	5.839	5.749	5.903
Properties in Care*	40.776	43.364	45.365
Technical Conservation Group	2.660	2.731	2.803
Central Resources	6.463	6.625	6.756
Capital Charges**	3.607	3.607	3.607
Total Forecast Funding ***	74.856	77.938	80.403

*See table under Properties in Care (section 6) for further breakdown

**Capital charges of £3.607 million are not allocated against specific areas of activity.

*** Funds are overcommitted in 2008-09 to allow for slippage on capital and grant projects.

3.6 As part of the Spending Review 2007 Historic Scotland, along with other Scottish Government organisations, were set targets for achieving **cash releasing efficiency savings** of 2% of non-grant expenditure. These savings have already been deducted from the Agency's budget allocation. Historic Scotland has a well developed programme of continuous improvement which should ensure that these targets are met. Savings achieved will be available to Historic Scotland to fund strategic priorities or emerging pressures. The targets set are:

	2008-09 £ (m)	2009-10 £ (m)	2010-11 £ (m)
Efficiency Targets (cumulative)	1.000	2.000	3.000

4

POLICY GROUP

CONTEXT

4.1 Policy Group provides the Scottish Government with **policy advice** on the historic environment and administers the **Historic Environment Grants Programme**.

4.2 Over the last Corporate Plan period, Policy Group established the Scottish Historic Environment Policy (SHEP) series: 5 SHEPS have been published to date. The new Conservation Area Regeneration Scheme was put in place, initially providing £8m to 18 projects across Scotland. The Historic Environment Audit programme was established, leading to the publication of the first-ever review of information on the historic environment in Scotland. The nomination for the Antonine Wall to become a World Heritage Site was submitted to UNESCO’s World Heritage Committee. The Group also absorbed a rising caseload on Strategic Environmental Assessment (now the responsibility of the Inspectorate).

DELIVERING HS FRAMEWORK DOCUMENT AIMS AND SG NATIONAL PERFORMANCE FRAMEWORK OUTCOMES

4.3 Fundamental to Policy Group’s role is ensuring that the Agency works closely with the Scottish Government to achieve its Purpose of increasing sustainable growth, for example through the detailed design of the Agency’s grant schemes and by contributing to the Government’s “Greener Scotland” agenda. The work of the Agency is relevant to a wide range of Scottish Government policies and activities, whether in support of sustainable development, regeneration, education, well-being or cultural identity.

RESOURCES

2008-09 £ (m)	2009-10 £ (m)	2010-11 £ (m)
15.512	15.862	15.969

Note: The uplift in 2009-10 relates to the £0.250 million for initiatives to improve the operation of the current system (paragraph 4.5 below). All other uplifts are minor and are for pay.

OBJECTIVES

4.4 Policy Group has 3 key objectives:

Objective 1: To support Scottish Ministers by ensuring that the appropriate legislation, evidence base, policies and guidance are in place to achieve the Agency’s aims.

Objective 2: To manage investment in historic buildings, conservation areas and voluntary organisations to achieve the Agency's aims.

Objective 3: To work with other parts of the Agency and within the Scottish Government to ensure that the Agency supports other government policies, and that other government policies take account of policies for the historic environment.

ACTIVITIES IN SUPPORT OF OBJECTIVE 1

To support Scottish Ministers in ensuring that appropriate legislation, policies, evidence base and guidance are in place to achieve the Agency's aims.

- 4.5 Comprehensive legislation to protect the historic environment is already in place but all of it predates the establishment of the Scottish Parliament. Following extensive stakeholder consultation between 2005 and 2007, the Scottish Government has decided not to initiate major legislative reform. Over the period of the Corporate Plan, Historic Scotland will identify opportunities for discrete legislative and operational initiatives to improve the operation of the current system. The Agency will also work with colleagues in Marine Directorate on the Scottish Marine Bill, to ensure that new provisions for the marine historic environment are incorporated.
- 4.6 In line with Framework Document requirements, Historic Scotland continues to develop strategic policies and key principles for the Agency for Ministerial approval in the series of Scottish Historic Environment Policies (SHEPs). In 2008-11 the priority will be to complete the process of reviewing and updating these strategic policies on the historic environment. The SHEP documents will continue to be developed in partnership with colleagues from across the Agency, particularly the Inspectorate, and in consultation with stakeholders.
- 4.7 Maintaining and developing the evidence base upon which policy for the historic environment is formulated provides another important role for Historic Scotland. During the last Corporate Plan period Scottish Ministers commissioned the Agency to take forward an audit of the historic environment. The Audit is now established, with a first publication completed – *A Review of Existing Information for Scotland's Historic Environment Audit*. This Corporate Plan period will be used to take forward the Audit, with the first full report planned towards the end of the Corporate Plan period, following preliminary work to establish the key headline indicators. The audit will gather, analyse and present a wide range of statistical information on the historic environment in order to identify trends and issues relevant to its health and the impact of efforts to manage and protect it. In this Corporate Plan period, the Agency also will develop its first over-arching research strategy. It will put in place structures and mechanisms for prioritising and co-ordinating its research activity, continuing to seek opportunities to work closely with other organisations which have similar research interests wherever possible.
- 4.8 In addition to policy advice and support to Scottish Ministers, we will

collaborate with the UNESCO World Heritage Committee, the Council of Europe and UK colleagues in relation to national, UK and international aspects of the historic environment. This will include ensuring management plans are developed and implemented for our existing World Heritage Sites; working with UK government on the development of its approach to World Heritage; and taking forward the implementation in Scotland of the Hague Convention for the protection of cultural property in the event of armed conflict.

- 4.9 In pursuit of its purpose of increasing sustainable growth, the Scottish Government has identified ‘Greener Scotland’ as a strategic objective. The Agency will be contributing to the climate change agenda across the range of its responsibilities – technical and conservation research, properties in care, the consent regime and communications – and working closely with relevant colleagues in the Scottish Government to ensure that the interests and contribution of the historic environment are fully recognised in this critical area. Policy Group will co-ordinate this work, ensuring in particular that the Agency’s potential contribution to technical research in this area is fully exploited and recognised more widely.
- 4.10 The Agency has identified ‘Buildings at Risk’ as a key area in which it wishes to develop its role. We will be working with colleagues in the Inspectorate and Technical Conservation Group, in particular, as part of a cross-Agency project over the corporate plan period to address the issues raised by buildings at risk. This work will consider how the Agency’s expertise and funding can be brought together with that of other organisations to help find solutions for such buildings, which can make a unique contribution to sustainable growth. In particular, we will be funding the Scottish Civic Trust to put the current Buildings at Risk Register on a more systematic footing, starting with a nationwide survey to improve the Register’s coverage of A-listed buildings. We also plan to undertake some work across the Agency around the theme of ‘place-making’.
- 4.11 The group will continue to provide general policy advice to Ministers on issues affecting the historic environment, including co-ordinating responses to the final set of reports from HEACS and respond promptly to requests for information and advice from within and outwith government.

ACTIVITIES IN SUPPORT OF OBJECTIVE 2

To manage investment in historic buildings, conservation areas and voluntary organisations to achieve the Agency’s aims.

- 4.12 Investment in the Agency’s Historic Environment Grants Programme over the Plan period will be as follows:

	2008-09 £ (m)	2009-10-10 £ (m)	2010-11 £ (m)
Historic Buildings/ Conservation Area			
Regeneration Schemes	12.8m	12.8m	12.8m
Voluntary Sector	0.6m	0.6m	0.6m

4.13 Investing in the historic environment enables the Agency to make a direct contribution to achieving sustainable growth. We recognise and acknowledge the role of a wide range of interests in investing in the historic environment, across the private, public and voluntary sectors. We will continue to invest in the historic environment through our programme of Historic Environment Grants available to owners and occupiers of listed buildings and ancient monuments, local authorities and other organisations. The primary purpose of the grants expenditure is to **sustain and meet the conservation needs of the most important elements of the historic environment**. Whether the building is on the Buildings at Risk register remains an important criterion in deciding which applications to accept. Investment decisions are also influenced by the extent to which individual projects:

- **Deliver benefits for communities** by helping to regenerate and promote the active use and ongoing care and maintenance of the historic environment, broadening access to it, promoting sustainable economic and rural development and reinforcing local identity and sense of place.
- **Promote quality and develop knowledge and skills** by promoting high quality standards of repair and maintenance, training and traditional craft skills, the continued use of indigenous building materials and the educational value of the historic environment.
- **Build capacity for local heritage management** by enabling voluntary heritage organisations and supporting local authorities to deliver policy for the historic environment.

4.14 The main activities in support of this objective will include:

- Continuing the funding of the Historic Buildings Repair Grant Scheme and exploring ways of making it even more effective and efficient.
- Evaluating the impact of projects supported by Historic Scotland after the significant changes introduced in 2005 to the Historic Buildings Repair Grant Scheme.
- Continuing to fund the Conservation Area Regeneration Scheme and to consider a further round of applications to establish at least another six Conservation Area Regeneration Schemes during the Corporate Plan period.
- Continuing to fund the Places of Worship Repairs Grants Scheme to run in conjunction with the Heritage Lottery Fund.
- Reviewing the remit of the City Heritage Trusts to ensure that they are delivering the objectives of Historic Scotland and the local community for the historic environment in the city.
- Supporting the updating of the Buildings at Risk Register in order to use the Register together with stakeholders to bring buildings back into re-use.

- Continuing support through grant and practical aid to enable the voluntary sector to work effectively in the historic environment field.
- Reviewing the building repair grant scheme in 2010 to ensure that it is continuing to meet the needs of the historic environment.

ACTIVITIES IN SUPPORT OF OBJECTIVE 3

To work with other parts of the Agency and within the Scottish Government to ensure that the Agency supports other government policies, and that other government policies take account of policies for the historic environment.

4.15 Many parts of government have an impact through their policies and operations on the historic environment and the historic environment can make a significant contribution to the delivery of outcomes across the whole range of government business. As the body with responsibility for providing policy advice to Scottish Ministers on issues affecting the historic environment, the Agency has a unique role to play in promoting understanding of the historic environment within government. Policy group will continue to co-ordinate the Agency's input into wider government processes.

4.16 Over the last Corporate Plan period, the Agency's increased investment in policy activity enabled it to build closer relationships with other parts of government.

It will continue to support this as a priority area. Activities in support of this objective will include:

- The development and maintenance of good communications with other parts of the Scottish Government, focussing on those policy areas which Ministers have identified as their highest priorities.
- Particularly close liaison with colleagues dealing with the Greener Scotland agenda, including the Climate Change Bill, to ensure that the historic environment plays its part, and to ensure that measures taken in this area in relation to the historic environment are appropriate.
- The development, publication and implementation of the Agency's Gaelic Language Plan.
- The updating of the Protocol for the Care of the Government Historic Estate by Government Departments.

KEY PERFORMANCE TARGET 2008-9

Issue 4 Scottish Historic Environment Policy papers in final form or for consultation.

Business Improvement and Other Targets

1. Achieve a closer proportionality between percentage of grant spend per local authority compared with percentage of listed buildings in each local authority area, to address historic patterns of low grant take-up in certain areas.

2. Improve the leverage rate for grant spend over a 3-year cycle.
3. Take decisions on applications within 2 months of the closing dates under the revised system of Historic Environment Grants.
4. 90% of priority buildings completed under the CARS scheme round 1 by 2011.
5. Undertake a best value review of the Agency's international work during summer 2008
6. Undertake a review of the performance of city heritage trusts to consider whether the trusts are providing value for the public resources invested in them during the summer of 2008.
7. Gather initial baseline data for the Historic Environment Audit during 2008-09 and publish this on our website during 2009.
8. Carry out a review into the effectiveness of the changes made in 2005 to the building repair grant scheme during 2009/10.
9. Submit a Gaelic Language Plan to the Bòrd na Gàidhlig during 2010.
10. Work with the Scottish Civic Trust to ensure that the Buildings at Risk Register covers Scotland systematically by 2011, initially improving coverage of A- listed buildings at risk by mid-2009 in order to inform the national target on the historic environment included in the National Performance Framework.

5

THE INSPECTORATE

CONTEXT

- 5.1 Historic Scotland's Inspectorate undertakes a range of activities on behalf of Scottish Ministers for the identification, protection, conservation and management of Scotland's historic environment.
- 5.2 The work of the Inspectorate includes the statutory designation of listed buildings, scheduled monuments, historic wreck sites and the compilation of the non-statutory inventory of gardens and designed landscapes. The teams work closely with owners, planning authorities and many other organisations and individuals who manage these designated sites and buildings to ensure that when change is being planned it is properly informed, and takes full account of cultural significance. The Inspectorate also administers the Agency's archaeological grant-aid schemes covering archaeology, ancient monuments and archaeological management agreements.
- 5.3 The Inspectorate provides support to the Agency's Policy Team for their work on the development of policy and initiatives relating to Scotland's historic environment including the Scottish Historic Environment Policy (SHEP) series, the legislative and policy change relating to the Planning (etc) Act 2006 and a range of other work.
- 5.4 Following a major programme of change in 2006, the new Inspectorate structure and processes have bedded down and a new programme of continuing professional development (CPD) has also completed a successful first year. A further programme of business improvement is ongoing which includes the introduction of ePlanning and work on the relative roles of the Inspectorate and planning authorities in the management of the historic environment against the backdrop of a joint working agreement which is currently under development. These initiatives are intended to help improve the efficiency and effectiveness of statutory casework and to ensure the most effective use of each organisation's knowledge and expertise. A review of the archaeological grants programmes was also undertaken in 2007 and changes to improve the programmes will be implemented in 2008.

DELIVERING HS FRAMEWORK DOCUMENT AIMS AND SG NATIONAL PERFORMANCE FRAMEWORK OUTCOMES

- 5.5 The work of the Inspectorate promotes sustainable growth by protecting and enhancing one of Scotland's greatest assets - its historic environment. Its activities include the identification, protection, conservation and promotion of historic buildings, monuments, gardens, landscapes and marine sites, and through

engagement with the planning process, involve the management of change so as to ensure lasting benefits for the people of Scotland. One of the more important strands in this process is the preservation and adaptive re-use of historic buildings and structures, which is already making a significant contribution to sustainability.

RESOURCES

2008-09 £ (m)	2009-10 £ (m)	2010-11 £ (m)
5.839	5.749	5.903

Note: 2008-09 contains £0.239 million funding for the casework management system which is a one year requirement.

OBJECTIVES

5.6 The Inspectorate has 6 key objectives:

- Objective 1:** To undertake programmes of statutory designation for buildings, archaeological sites and monuments and historic wrecks, and a programme of non-statutory designation for gardens and designed landscapes and to make information on these sites publicly available.
- Objective 2:** To provide statutory and other advice to the Scottish Government, local authorities, owners, developers and others on applications for works affecting Scotland's historic environment including its listed buildings, scheduled monuments, gardens and designed landscapes, and designated wreck sites.
- Objective 3:** To manage the programmes of grant-aid for the repair and management of scheduled monuments and for archaeological rescue and research projects in Scotland and to provide advice to other grant providers.
- Objective 4:** To increase and promote knowledge of Scotland's historic environment and best practice in its management through training, publications, exhibitions and other related initiatives.
- Objective 5:** To provide support for the Agency's Policy Group in the development of legislation, policy and associated initiatives relating to the historic environment.
- Objective 6:** To assist public authorities in ensuring that their development and other strategic plans contain robust policies for the protection and sustainable enhancement of the historic environment and that Scottish Ministers' historic environment interests are appropriately addressed within both the Strategic Environmental Assessment and Environmental Impact Assessment regimes.

ACTIVITIES IN SUPPORT OF OBJECTIVE 1

To undertake programmes of statutory designation for buildings, archaeological sites and monuments and historic wrecks, and a programme of non-statutory designation for gardens and designed landscapes and to make information on these sites publicly available.

- 5.7 Historic Scotland undertakes four areas of designation: listing of historic buildings, scheduling of archaeological sites and monuments, designation of historic wreck sites, and compilation of the non-statutory inventory of gardens and designed landscapes. The teams involved in this activity each work within a strategic framework and may undertake a range of programmes including area-based survey, thematic survey and responses to individual requests, frequently working closely with a range of bodies including the Royal Commission on Ancient and Historical Monuments of Scotland (RCAHMS), local authorities and local societies.
- 5.8 **Listing:** over the plan period the team will complete resurvey of specified wards including the area of Edinburgh's World Heritage Site, Perth Burgh and Stewarton in East Ayrshire and parishes in the Scottish Borders. These have been selected because the current statutory lists of buildings in these areas have not been reviewed for several decades and are in need of updating. The list revisions will ensure that those planning or managing future change in these areas are equipped with the most up-to-date information. In addition the team will undertake thematic surveys including Basil Spence's work, historic theatres, Scottish water facilities and Cold War structures. The importance of these thematic areas within the built environment combined with improvements in understanding and development pressure have led to their selection.
- 5.9 **Scheduling:** over the plan period the team will undertake work in eastern Dumfries and Galloway, East Renfrewshire, Renfrewshire, Inverclyde, Fife and Shetland, as well as complete scheduling proposals stemming from 2007 fieldwork in eastern Strathdon and SE Borders. The focus is on areas that are under-scheduled and where scheduling programmes will most quickly make a positive difference. The team has a 10-year forward plan for area scheduling, reviewed each year in liaison with key internal and external stakeholders. The team will also complete the thematic review of the Antonine Wall, which will aid management of the new World Heritage Site.
- 5.10 **Gardens and designed landscapes:** Historic Scotland has recently taken over full responsibility for the Inventory of Gardens and Landscapes and made the inventory available on its website in the autumn of 2006. Over the plan period it is intended to review the current content of the inventory against clearly established criteria of importance to ensure that all entries meet a consistent standard of significance. The Inventory is intended to identify sites of national importance. It must therefore be accurate and informative for the stakeholders. As the majority of sites were researched some 20 years ago, many will have seen significant changes and some, as a result of this and increased knowledge, require a reassessment of their boundaries. It is also now evident that a significant number are no longer considered as of national significance and therefore will be removed from the Inventory as part of the broader process of review.

- 5.11 **Marine:** in 2007 Historic Scotland appointed a Senior Inspector of Marine Archaeology to assist in the development of a policy for Scotland's marine historic environment and to design a strategy for its protection. A public consultation on a draft SHEP The Marine Historic Environment was launched in March 2008. Over the plan period, the Inspectorate will support Policy Group in advising Scottish Ministers on how best to integrate consideration for the historic environment, including new mechanisms to protect nationally important marine historic sites, within a Scottish Marine Bill. The Inspectorate will prepare a discussion paper to identify the operational challenges and opportunities for the management of Scotland's marine heritage and will prepare its own priorities for safeguarding marine historic sites and for promoting their understanding and enjoyment.

ACTIVITIES IN SUPPORT OF OBJECTIVE 2

To provide statutory and other advice to the Scottish Government, local authorities, owners, developers and others on applications for works affecting Scotland's historic environment including its listed buildings, scheduled monuments, gardens and designed landscapes, and designated wreck sites.

- 5.12 Each year the statutory casework teams are involved in a range of development and related proposals which affect listed buildings, scheduled monuments, gardens and designed landscapes, conservation areas and designated wreck sites. They usually deal with circa 250 scheduled monument consent applications each year, and comment on about 3000 consultations and notifications from local authorities on proposed works affecting listed buildings, scheduled monuments, gardens and designed landscapes, conservation areas and designated wreck sites.
- 5.13 As part of the wider planning reform and related improvements, the Inspectorate is undertaking a series of improvements across the plan period, working closely with local authorities and other key partners. These improvements are designed to strengthen and streamline the Inspectorate's relationship with, amongst others, local authorities and to facilitate more effective consultation with developers and other stakeholders. These include facilitating ePlanning as part of a Scotland-wide initiative, and the introduction of a joint working agreement with each planning authority setting out respective roles and responsibilities for managing the historic environment. We will also pilot a scheme of delegation to local authorities for certain specified works to category B-listed buildings, and replace the Memorandum of Guidance on Listed Buildings and Conservation Areas with a broader set of guidance and best practice notes for managing change in the historic environment which will also be available online. To support the management of the statutory casework, a new casework management system will also be designed and implemented over the plan period.

ACTIVITIES IN SUPPORT OF OBJECTIVE 3

To manage the programmes of grant-aid for the repair and management of scheduled monuments and for archaeological rescue and research projects in Scotland and to provide advice to other grant providers.

- 5.14 Over the plan period grants will continue to be awarded for rescue and research

archaeology, for ancient monument repairs and for management agreements. Key projects identified for grant in the first year of the plan period include a number of rescue excavations on threatened coastal sites. The Archaeology Programme also includes support for projects being run by a wide range of national, regional and local organisations such as Scotland's Rural Past Project and the Adopt-A-Monument Project, both of which include local community participation. Funding for the analysis and publication of completed archaeological projects and for a wider programme of radiocarbon dating also continues.

- 5.15 The Inspectorate will continue to provide advice to Transport Scotland on the management and mitigation of the impact of road and associated schemes on the historic environment. It will also continue to give advice to other grant providers both within Historic Scotland and to other bodies such as the Heritage Lottery Fund.
- 5.16 In 2007-08 a review of the three grant streams (the Ancient Monuments Investment Review) was undertaken, and incorporated the findings of a public consultation. Over the plan period the recommendations of the review will be implemented looking both to improve the transparency of the schemes and to ensure that grants are awarded against a clear national strategic framework. This will be accompanied by the release of new guidelines for the scheme. In parallel with this work, a review will be undertaken on the future direction of the Scottish Burgh Survey Programme.

ACTIVITIES IN SUPPORT OF OBJECTIVE 4

To increase and promote knowledge of Scotland's historic environment and best practice in its management through training, publications, exhibitions and other related initiatives.

- 5.17 The Inspectorate undertakes a wide range of work to promote research into, and the understanding of Scotland's historic environment and best practice in relation to its management. Information on listed buildings, scheduled monuments, designated wreck sites and sites on the Inventory of Gardens and Landscapes is constantly being updated and improved and can be accessed by the public on Historic Scotland's website (www.historic-scotland.gov.uk) and is also available via PASTMAP (a joint GIS-based initiative in partnership with the Royal Commission on Ancient and Historical Monuments of Scotland (www.pastmap.org.uk)). Wider research also includes the Historic Land-use Assessment project, organised jointly with the Royal Commission on Ancient and Historical Monuments of Scotland, which aims to provide a detailed assessment of historic development and character of Scotland in digital form. To help ensure best practice in management of Scotland's historic environment and to promote sustainable development, the Inspectorate has introduced a number of initiatives including assigning one of its expert staff to work in the team designing and implementing Scotland's Rural Development Programme and has also joint-funded a heritage officer post at British Waterways Scotland.
- 5.18 Over the plan period team members will contribute to continuous professional development programmes and related training initiatives and will provide a wider range of lectures for local authorities, national and local societies and

many other organisations. As noted above, it is also intended to replace the *Memorandum of Guidance on Listed Buildings and Conservation Areas* with a new leaflet series on giving guidance and best practice for managing change in the historic environment and this series will be expanded to draw in other leaflets on best practice for the historic environment. These will be available both on paper and to download from the Historic Scotland website.

- 5.19 Exhibitions and popular publications will support key parts of the statutory and thematic designation programmes over the plan period, including the publication of a booklet on post-War listing in Scotland. The production of key archaeological reports and related material will continue to be supported through the archaeological grants programmes.
- 5.20 In 2007 the Inspectorate took over responsibility for the *Dictionary of Scottish Architects*, a key source of information on Scotland's historic buildings (<http://www.codexgeo.co.uk/dsa/index.php>). Working in partnership with a number of organisations, we will both maintain and take forward new work to develop the dictionary.

ACTIVITIES IN SUPPORT OF OBJECTIVE 5

To provide support for the Agency's Policy Group in the development of legislation, policy and associated initiatives relating to the historic environment.

- 5.21 The Inspectorate will continue to provide a range of advice and support to the Agency's Policy Group relating to the development of legislation and policy for the historic environment and on grants associated with historic buildings, Conservation Area Regeneration Schemes, and jointly funded projects with the Heritage Lottery Fund. This will include contributions to the Scottish Historic Environment Policy series (SHEPs), changes to secondary legislation relating to the Planning Etc (Scotland) Act 2006 and a variety of other initiatives.

ACTIVITIES IN SUPPORT OF OBJECTIVE 6

To assist public authorities in ensuring that their development and other strategic plans contain robust policies for the protection and sustainable enhancement of the historic environment and that Scottish Ministers' historic environment interests are appropriately addressed within both the Strategic Environmental Assessment and Environmental Impact Assessment regimes.

- 5.22 The main activities in support of this objective will include:

- Undertaking and developing Scottish Ministers' role as a Consultation Authority under the Environmental Assessment (Scotland) Act 2005 (known as Strategic Environmental Assessment - SEA).
- Providing guidance and advice throughout Historic Scotland on the Agency's role as a Responsible Authority under the above act and undertaking the SEA of its own qualifying plans, programmes, strategies and policies.

- Continuing to fulfil Scottish Ministers' role as a consultee under the Environmental Impact Assessment Regulations which apply across a wide range of statutory development consent regimes.
- Ensuring that strategic planning and other policy documents emanating from other parts of the Scottish Government, local authorities and others recognise and reflect national policy for the historic environment within their own policies.
- Continuing to deal effectively and timeously with all such consultations referred to Historic Scotland and to seek to ensure positive outcomes for the historic environment.
- Working with colleagues on the implementation of the Planning Etc (Scotland) Act 2006.

Note: This is an area of activity over which the Agency has no discretion. We expect that demand for this activity to increase over the plan period.

KEY PERFORMANCE TARGETS 2008-9

1. To reach a view on 80% of scheduled monument consent applications within 5 weeks.
2. To reach a view on 97% applications for listed building and conservation area consents within 28 days.
3. To reach a view on 70% of statutory planning consultations within 14 days in 2008-09 rising to 90% in 2009-10.

BUSINESS IMPROVEMENT AND OTHER TARGETS

1. To design and implement a joint working agreement with Scottish planning authorities: target - 3 pilot schemes in 2008-9; agreements with all 34 planning authorities by close of the plan period.
2. Introduction of an ePlanning system for local authority consultation: target - April 2010 for full implementation.
3. Replacement of the existing casework management system: target - pilot January 2009 and full implementation September 2009.
4. Staged withdrawal of the *Memorandum of Guidance on Listed Buildings and Conservation Areas* and replacement with new leaflet series: target - April 2009.
5. Exploration of possible delegation of consideration of minor works on category B-listed buildings to local authorities: target - 2 pilots established in 2008-9 with wider implementation in 2009-10.
6. To develop a strategy and Historic Scotland action plan for designation, protection and promotion of Scotland's marine historic environment: target - over the plan period.

7. To implement changes to the archaeological, ancient monuments and management agreement grants programmes in light of the 2007-8 review: target - September 2008.
8. Review Scottish Burgh Survey Programme and identify new strategy: target - April 2009.
9. Identify and implement a publication and archiving strategy for backlog archaeological projects: target - June 2008.
10. Implementing eBuy and eProcurement systems within the Inspectorate, working with the Agency's Procurement Unit: target - April 2009.
11. Meet statutory and agreed deadlines as a consultation authority (on behalf of Scottish Ministers) for strategic environmental assessment. These are:
 - Screening responses – within 28 days
 - Scoping responses – within 35 days
 - Environmental reports – as agreed.
12. Meet statutory and agreed deadlines as a consultee (on behalf of Scottish Ministers) under the Environmental Impact Assessment Regulations. These are:
 - Scoping responses – within 5 weeks or other agreed period
 - Environmental Statements - within 4 weeks or other agreed period.
13. To undertake regular liaison with other consultation authorities – the Scottish Environmental Protection Agency and Scottish Natural Heritage – and with the Scottish Government SEA Gateway over the application of SEA legislation in Scotland.

6

PROPERTIES IN CARE

Context

6.1 Properties in Care look after 345 monuments around Scotland on behalf of the Scottish Ministers, for the benefit of those living in and visiting Scotland. The portfolio is diverse, including many unique and inspirational places. As well as undertaking conservation and maintenance work on all monuments, we open them to the public, with the aim that visitors will leave the sites having enjoyed their visit, with a greater appreciation and understanding of its place in history and its importance to us now.

6.2 Our work concentrates on four main business areas:

- Conservation and Maintenance;
- Visitor Services and Business Development;
- Understanding and Access; and
- Major Projects.

Although each of these business areas has clear aims and objectives, co-ordination and communication across Properties in Care is vital in achieving our objectives.

6.3 Our conservation and maintenance work has been undertaken on a rolling programme for many years. Work can run ahead or behind schedule for any of a number of reasons, such as weather or availability of materials. With condition surveys completed for all sites we are well placed to ensure priorities across the estate are weighted and programmed. We aim to formalise our processes and introduce a means of assessing how many of our prioritised planned projects are started within each year.

6.4 Historic Scotland is the largest operator of visitor attractions in Scotland, making an important contribution to the Scottish economy as a whole. Visitor numbers have continued to grow across the estate, and Edinburgh Castle remains the most visited charging tourist attraction in Scotland. Our earned income is a vital source of funds which is invested back into the protection of the Scottish built heritage. To ensure we provide the best possible experience for visitors, we monitor performance in a number of areas, focusing on mystery visits and educational visits to provide feedback and indicate our effectiveness in achieving our aims.

6.5 The branch of Understanding and Access was established within Properties in Care in early 2008 incorporating the existing teams of Education, Interpretation and Cultural Resources, and the Collections and Photography team transferred from the Inspectorate. Incorporating these teams within the same branch will allow a coordinated approach, enabling us to take the story of the monuments and their history to the people living in or visiting Scotland in a more effective way.

- 6.6 Some of the Properties in Care, often the larger ones, offer opportunities for major developments. These may involve the enhancement of the visitor appeal, the provision of new facilities or the development of new income streams. Often it is a combination of the above coupled with associated conservation works and operational changes. These large projects, which include significant works at Stanley Mills, Stirling Castle and Maeshowe, are co-ordinated and managed by PIC's Major Projects Team.

DELIVERING HS FRAMEWORK DOCUMENT AIMS AND SG NATIONAL PERFORMANCE FRAMEWORK OUTCOMES

- 6.7 Increasing sustainable growth is a key government objective and is represented throughout the activities of Properties in Care. As Scotland's number one provider of visitor attractions we are a key player in the tourism industry and in attracting visitors from across the globe to Scotland. We have world class standards of visitor service which enhance the visitor experience. Our built heritage is a major reason for visitors coming to Scotland and our properties lie at the heart of that experience. Last year we welcomed 3.19m visitors to our sites, many of which are in rural locations therefore supporting local communities and economies, and providing high quality jobs across Scotland in visitor services and in conserving and caring for our properties.
- 6.8 Through protecting and conserving some of the most important and inspirational places in Scotland we tell the stories of the people, places and events which shaped Scotland into the place we recognise today. In doing so we protect our cultural heritage for current and future generations building on the national and international ties to Scotland and encouraging those who live in and visit our country to experience our history and culture.
- 6.9 We are constantly investigating ways to become more efficient at what we do. A rolling programme of health-checks and reviews of business areas enable us to scrutinise our activities and undertake the necessary measures to streamline our processes. We will continue to work in partnership with other heritage and tourism organisations to build Scotland's profile as a tourist destination with our built heritage central to the visitor experience.

RESOURCES

- 6.10 The table below shows the projected allocations across the four business areas of PIC.

	2008 – 09 £ (m)	2009 – 10 £ (m)	2010 – 2011 £ (m)
Conservation and Maintenance	16,618	16,953	17,300
Visitor Services and Business Development	16,092	16,634	17,035
Understanding and Access	2,561	2,611	2,662
Major Projects	3,148	4,167	5,187
Central	2,357	2,999	3,181
TOTAL	40,766	43,364	45,365

The existing budgets are walked forward and adjusted for pay, staff posts and the Stirling SR monies.

OBJECTIVES

6.11 Properties in Care has 5 key objectives:

Objective 1: To care for, protect and enhance properties in care.

Objective 2: To secure greater economic benefits from properties in care.

Objective 3: To help people value, understand and enjoy properties in care.

Objective 4: To achieve continuous improvement.

Objective 5: To contribute to the wider objectives of the Agency and the Scottish Government.

ACTIVITIES IN SUPPORT OF OBJECTIVE 1

To care for, protect and enhance properties in care.

6.12 First round Condition Surveys have been completed for all sites, and a continuous programme to revisit and review the conservation strategy for each site is now underway. The strategy is a key document in the care of the site and provides an agreed prioritised list of works required at the particular site which informs the drawing up of annual and five year programmes.

6.13 Monitoring of condition is undertaken through a number of mechanisms. These include a matrix of inspections and visits which are currently being mapped in detail for each site. Issues arising are fed into a series of reports and meetings for information and action, including the adjustment of planned programmes, as new issues or emergencies arise.

6.14 The conservation programme for the Properties in Care, is therefore fed by the conservation strategy contained in the condition survey for each site. Work is prioritised and managed on a rolling programme subject to external factors and funding. This programme is therefore subject to change as the year progresses.

6.15 Monument Management Plans (MMPs) are being developed as a framework to map the information each business area within PIC uses to inform decision making including conservation strategy and statements of significance. The first stage of six pilot projects has been completed in 2007-08, the next will be undertaken throughout 2009. This will then inform a detailed programme to develop an MMP for each site, providing a top line summary of the issues for each site and an indication of agreed priorities which may take a number of years to complete for the estate. The MMPs will support an audit trail of prioritisation and project decision making for PIC's work at each site taking into account all factors, particularly an understanding of significance, condition and visitor needs.

- 6.16 The Cultural Resources team will maintain interim statements of significance, which are integrated into the MMP for each site. A rolling programme of peer review of the statements and, where necessary, research in order to provide full statements will be developed. This programme will develop from the Research Strategy to be published. A pilot of full statements will be carried out in 2008-09 for Caerlaverock Castle, Edinburgh Castle, Fort George, Iona and Skara Brae. These will be evaluated in the following year and a programme for the completion will be developed.
- 6.17 A heritage management database will be developed and maintained, recording archaeological interventions at PICs as part of Monument Management Planning for each site. The baseline record will be completed with the archaeological data enhancement for a cross-section of 50 PICs, small to large by 2009.
- 6.18 The Heart of Neolithic Orkney Management Plan will be completed in summer 2008, and the process of delivering and monitoring this plan will start thereafter. The adoption of the management plan will guide the partners in delivering the actions identified, including the production of a revised statement of universal values for the site; providing and applying an agreed description of the setting of the site; and implementing the objectives of the plan on protection, conservation, research and access.
- 6.19 Coastal erosion, storm damage and flooding are likely to increase as a result of climate change. This is of most immediate concern at Skara Brae, where protection of the site and the archaeology in Skaill Bay has emerged as an important action point in the Heart of Neolithic Orkney Management Plan. Research and the development of a long term action plan will be taken forward with the partners from 2008-13.
- 6.20 A review of PICs ancillary accommodation will be launched in 2008 to assess our offices, stores, depots and workshops around the country which will recommend the increase or release of assets. Informal programming of any changes identified will occur in the period of the plan.
- 6.21 Works identified to improve access for all and to address key visitor health and safety issues continues and an annual programme for each year of the plan period will be developed through a process of “natural smoothing” to ensure we address these important issues consistently.

ACTIVITIES IN SUPPORT OF OBJECTIVE 2

To secure greater economic benefits from properties in care.

- 6.22 Over the period of the plan we aim to consolidate our visitor numbers to consistently be above the three million level reached in 2007 - 08. Market indicators suggest we are entering a challenging and unpredictable time in the tourism market, as such we intend to maximise income from other sources, implementing the recommendations of our recent Commercial Business Review. This will enable Historic Scotland to continue to grow income to £29.6 million by March 2011, an increase of 19% over the period of the plan.

	2007-08	2008-09	2009-10	2010-11
Visitor Numbers	3,190,603	3,077,743	3,125,817	3,113,314
Total PIC Income	£24.9m	£25.6m	£28.0	£29.4m

The visitor numbers and income for 2007-08 were above trend because the year contained two Easters. 2008-09 contains no Easter. An April Easter means around 30,000 extra visitors and £180,000 extra income. Our other assumptions are that our growth will come from maximising the income generated from our visitors rather than growth in visitor numbers; a one-off boost of 15,000 visitors in the Year of the Homecoming in 2009-10; annual price increases of between 5 and 7.5%; an extra £1m as a result of our investment in the Edinburgh Castle Visitor Reception project; and an extra £900k because of our retail strategy. The projected growth in income is broadly in line with the 4% per annum real growth in revenue which is required if the tourism sector in Scotland is to meet the target set for 2015 in the TFFC. The outlook for visitor numbers and visitor spend is unusually uncertain at the moment, because of the credit crunch and rising inflation, and these projections could well prove to be optimistic.

- 6.23 Greater commercial focus will be given to our top three visited properties – Edinburgh, Stirling & Urquhart Castles. At Edinburgh, the priority will be to maximise the return on investment in the new visitor reception and ticketing facility, achieving the targets laid out in our business plan. At Stirling Castle, the focus will be on completing the Palace Project, which will enable us to achieve a ‘step change’ in visitor numbers. At Urquhart Castle, our aim is to work closely with other partners in the local destination management organisation – ‘Destination Loch Ness’ to attract more visitors to the area.
- 6.24 Edinburgh Castle’s state of the art visitor reception opened in January 2008. This not only gives us the opportunity to reduce queuing times dramatically, but also to increase income by selling tickets (and other products) in advance via on-line sales. We aim to sell 40% of our tickets in advance by 2011 and generate an additional £1,057,334 by increasing visitor spend by March 2010.
- 6.25 Work on the conservation and presentation of the James V Royal Palace and the display of the Stirling Heads at Stirling Castle is due to start late summer 2008. This will be one of Historic Scotland’s largest projects and will help move Stirling Castle to a must see attraction and increasing visitor numbers by 20%. The project is programmed to be complete for opening in Easter 2011. Work on the “Hunt of the Unicorn” tapestries will continue throughout this period, due to be completed in 2013. Together these projects form the catalyst for improving the visitor experience at Stirling, through a number of initiatives including the introduction of costumed interpreters and the development of new sales and marketing strategy for the site. We aim to attract 475,000 visitors in 2011, an increase of 22% on present levels.
- 6.26 Stronger brand identities will be developed for our top three sites and will be rolled out during the period of the plan, enabling us to promote our properties and services more strongly within the tourism market, and encouraging more visitors to explore Scotland’s rich historic environment.

- 6.27 Historic Scotland has been and will continue to be an active partner within the tourism sector at a national level, participating in groups like Association of Leading Visitor Attractions and the Association of Scottish Visitor Attractions, and at regional level through representation on over 50 groups.
- 6.28 For example, over the next three years we will invest time and resources in the following initiatives:
- Historic Properties Group comprising Historic Scotland, National Trust for Scotland and Historic Properties Group working together to develop the heritage tourism industry's response to changing market trends, based on the conclusions of joint research due to be completed in 2008;
 - Edinburgh Tourism Action Group (ETAG) which will be chaired by the Executive Manager for Edinburgh Castle during 2008;
 - Stirling Tourism Action Group and Stirling 2020 Group which is committed to building the city's reputation as a world class destination; and
 - Destination Loch Ness: a destination management organisation, again focussed on building the business infrastructure and increasing visitors' dwell time and spend in the area.
- 6.29 Whilst it is not possible for Historic Scotland to participate in every local tourism or community group throughout the country, we will actively encourage our Monument Managers to participate in a local initiative.
- 6.30 As well as the Annual Maintenance Grant given to the National Trust for Scotland, we provide advice and guidance to them and other organisations from our Conservation and Maintenance team. This team is also liaising with the National Trust for Scotland on Monument Management Plans.

ACTIVITIES IN SUPPORT OF OBJECTIVE 3

To help people value, understand and enjoy properties in care.

- 6.31 The Historic Scotland quinquennial visitor survey was conducted in 2007 across 20 properties; the ten most visited and another ten around the country. Across all properties overall satisfaction was recorded at 99% compared to 98% in 2002. The survey found that 93% of Edinburgh visitors rated the overall service received as good or very good; at the other 19 properties this was rated at 92%. Further, 62% of visitors at the 19 properties could not suggest any improvements; those who did suggested more information (7%), more displays (4%) and more foreign language provision (4%). At Edinburgh Castle 53% could not suggest any improvements; those who did mainly suggested cheaper admission (10%). Visitor origins at Edinburgh Castle were 66% overseas; 26% rest of UK and 8% Scots. This compares with 54% overseas; 28% rest of the UK and 18% Scots at our other properties. Within Europe most visitors came from Germany, whilst overseas the majority were from USA, 22% at Edinburgh Castle, 14% elsewhere. This survey provides important information to track our performance and market trends from 1996 to help shape business strategy.

- 6.32 VisitScotland Quality Audits will continue to be used as the focus for continuous improvement of our visitor facilities at our staffed properties. Our aspiration over the period of the plan is to ensure almost 90% of our properties achieve 4 or 5 star status by 2011.
- 6.33 We are committed to delivering world class service. Over the period of the plan, we will renew our Mystery Visit contract, giving us the opportunity to further improve the quality of feedback from our independent auditors required to refine our service standards. As well as tracking our overall satisfaction rating, we will start to track our 'Value for Money' rating at our top three properties, with an anticipated delivery rating of 78% of visitors reporting value for money as "Excellent" or "Good" by 2011.
- 6.34 The Understanding and Access branch established in 2008 will provide a focus for the delivery of information and presentation at PICs. This branch incorporates the skills of historians, archaeologists, interpreters, educators, curators and photographers. This structure will improve communication and provide an integrated approach to inspiring visitors to PICs
- 6.35 Our educational programme will become an area of increased focus over the next three years. We aim to achieve continued success, measured through survey feedback, of 93% satisfaction of quality on educational visits. We will also increase our number of junior guides on sites, and employ more lifelong learning officers to widen our approach.
- 6.36 The dissemination of information is changing with the introduction of new technology. In response to this, microsites will continue to be developed, providing in depth information on individual monuments to be available remotely. The success of the Whithorn Priory pilot site will inform the roll out of this programme.
- 6.37 A five year programme has been established to roll out the successfully piloted guidebook format to the remainder of the staffed PICs. In addition, a programme will be developed to provide children's material, piloted in 2009.
- 6.38 Homecoming Scotland aims to motivate people of Scottish descent to come home in 2009 and take part in an inspirational celebration of our culture, heritage and the many great contributions Scotland has given to the world. Historic Scotland will organise events, ticketing offers and activities which will enable the Scottish diaspora to explore their family links with properties in care. These will include family trails and living history events which bring the past to life.
- 6.39 Regional projects to improve the quality of interpretation and facilities will be taken forward at a number of sites including St Vigean, Fort George, Caerlaverock and Iona. A smaller number of 'First Impressions' projects will also help us improve the welcome that we provide via our car parks, visitor receptions and so forth, focusing on signage provision and brand identity. This initiative aims to improve the service we offer at twenty of our properties by 2011.

- 6.40 The Stanley Mills Reception, Education and Community Facilities project opened in Easter 2008. As a new attraction, we have been able to provide a wider interpretative range with interactive installations, and giving visitors the opportunity to “work” in the mill. We aim to attract 25,000 visitors annually until 2011, including 5,000 educational visits, with an income target of £110,000 and customer satisfaction rating of 90% in 2010 – 2011.

ACTIVITIES IN SUPPORT OF OBJECTIVE 4

To achieve continuous improvement.

- 6.41 The Professional Services Review will launch during 2008 and will look at how our professional resources are used within PIC and the wider Agency, investigating the possible range of options for delivery to ensure we are effectively using our skills within Historic Scotland. The review will be presented to the Historic Scotland Board in November 2008.
- 6.42 During 2007 we conducted the first of a series of business health checks with the review of our retail team. This has resulted in a five year strategy for retail which will focus on growing sales by 7% per annum at Edinburgh, Stirling and Urquhart Castles. The emphasis at our other sites will be to streamline our product ranges and increase the efficiency of our back office operations. A new admissions and retail system will be installed in these sites within three years and the main gift shop at Edinburgh Castle will be refitted. We have also completed a review of our catering and travel trade business. During 2008 we will undertake reviews of Corporate Functions, Weddings, Membership, Events and Marketing. This will result in a five-year strategy with clearly identified sales goals and investment plans for each area.
- 6.43 A review of all Historic Scotland ancillary accommodation will be undertaken through the lifespan of this report. This review will allow consolidation of all buildings we use, with an Asset Management Register to be completed by 2011.
- 6.44 A new Leadership Development Programme is scheduled to be rolled out during 2008, which will enhance training for senior management within Properties in Care. This forms part of our staff development initiative to ensure our management team maximise their potential for their benefit and that of Properties in Care.
- 6.45 During the coming year the collections unit will take the lead of preparing the Agency’s application to the Museums, Libraries and Archives Council for museum accreditation status – the nationally recognised standard for collections care. This will ensure we meet national standards of conservation and collections care, allowing us to have finds disposed to us. Guided through the process by the Scottish Museums Council, in addition to making a successful corporate application, the hope is to give recognition to various collections at specific properties across Scotland.

ACTIVITIES IN SUPPORT OF OBJECTIVE 5

To contribute to the wider objectives of the Agency and the Scottish Government.

- 6.46 Sustainability is at the heart of everything which Historic Scotland does, including the conservation and presentation of the properties in its care. Throughout the plan period we will monitor environmental performance especially energy use and related issues of emissions, on a number of sites on a pilot basis to create a model to roll out across the estate.
- 6.47 In addition, Historic Scotland is a member of the Sustainable Tourism Partnership, a public/private sector grouping whose aim is to make Scotland the most sustainable tourism destination in Europe by 2015. Historic Scotland properties are inspected through the Green Tourism Business Scheme and are assessed on how well they limit their effect on the environment. Our participation in this scheme has been very successful with most properties holding a gold or silver award. Proposed changes to the scheme in 2008-09 will provide a new challenge for the management of our properties.
- 6.48 The Education Unit's work in developing new audiences and creating a programme of sustainable educational development at properties across Scotland will support the commitment to lifelong learning at a local level.
- 6.49 We will support the social justice agenda by providing a schools outreach programme throughout Scotland for 20 primary schools per annum in areas of multiple deprivation or rural isolation.
- 6.50 The Interpretation Unit will develop a National Interpretation Strategy aimed at delivering a broad range of interpretation to the widest possible audience. One important audience, which does not always feel included, is the local community. The national strategy will, therefore, provide the platform for building a sustainable programme of partnerships, one-off events and activities around the country to involve communities in their local property in care
- 6.51 We have been working with the local community throughout the project at Stanley Mills and will continue to build on this by encouraging local use of the site and facilities, and by fostering links with local people who worked in the Mill and still live in the area. A volunteering scheme will also be developed and closely monitored to assess the suitability for roll-out across the estate.

KEY PERFORMANCE TARGETS 2008-09

- 1. Total earned income of £25.879m in 2008 – 09.
- 2. Performance rating of 88.5% from mystery visits in 2008 – 09.
- 3. Performance rating of 93% from educational visit appraisal forms.
- 4. Stirling Castle Palace Project main contract to be accepted and on site by December 2008.

BUSINESS IMPROVEMENT AND OTHER TARGETS

Conservation and Maintenance

- Achieve planned progress in eight out of ten programmed high priority conservation projects each year.
- Review of Ancillary Accommodation for Asset Management Register to be completed by 2011. Develop a forward plan by the end of 2011 but with initial projects for further investigation highlighted in 2008.
- Best value review of professional services to be completed by November 2008.
- Complete roll-out of incident response framework across PIC on a prioritised basis with completion of all sites by 2011.
- Agree implementation strategy arising from Health and Safety risk assessments and create a programme of works to be completed by March 2011.

Major Projects

- To ensure that in March 2011 the Stirling Castle Palace Project is on schedule and within budget.
- Produce and actively manage a prioritised rolling programme of capital projects across the estate.
- Prepare a business plan and options appraisal recommending a solution for replacement visitor facilities at Maeshowe to present to the Historic Scotland Board by January 2009.

Visitor Services and Business Development

- Achieve visitor numbers of 3.1m by 2010, aiming to retain that level for the final year of the plan.
- Record 78% of visitors reporting a Value for Money rating of “Excellent” or “Good” by 2011.
- Grow membership numbers to 90,000 by 2011.
- 88% of sites achieving 4 or 5 star visitor status by 2011.
- Develop and roll out electronic admissions and retail systems to all sites by 2011.
- 40% of admission sales to Edinburgh Castle sold in advance by 2011.
- Establish a volunteering scheme at Stanley Mills by 2011.

Understanding and Access

- Achieve a target of 73,000 visits through the free educational visits scheme by March 2011.
- Support statutory formal education by providing a Curriculum for Excellence focused programme of schools activities for pupils aged 3-18 at 28 sites across Scotland by March 2011.
- Support the social justice agenda by providing a schools outreach programme throughout Scotland for 20 primary schools per annum in areas of multiple deprivation or rural isolation.

- Development of two PIC Microsite web sites in 2008.
- Complete the Sites and Monuments database with the archaeological data enhancement for a cross-section of 50 PICs small to large by 2009.
- Develop eight guidebooks in line with the guidebook programme.
- Publish a PIC archaeological research strategy by March 2009.
- Achieve Museums Libraries and Archives Council accreditation by 2011 and develop strategy for individual site accreditation.

7

TECHNICAL CONSERVATION GROUP

CONTEXT

- 7.1 The built environment requires appropriate knowledge, skills and materials to ensure it is appropriately repaired and maintained for current and future generations, and in order that it can contribute to sustainable growth in Scotland.
- 7.2 We must better understand how the traditionally built environment can contribute to mitigating climate change effects. This is an area which is technically not well understood, and the traditionally built environment often suffers as a result. We need to understand how traditional buildings function and ensure that the desire for ‘quick fixes’ does not degrade the quality of the built environment through lack of understanding. The perception that ‘old is cold’ is an over-simplification and in many instances simply untrue. We need to map the positive benefits of embodied energy and carbon foot-printing of traditional materials and building practices to achieve a fuller understanding of the issues.

DELIVERING HS FRAMEWORK DOCUMENT AIMS AND SG NATIONAL PERFORMANCE FRAMEWORK OUTCOMES

- 7.3 To **care for, protect and enhance the historic environment**, we must define and encourage the best knowledge, skills and materials. We need to provide specialist expertise to best inform those caring for the built environment.
- 7.4 To **secure greater economic benefits from the historic environment**, we should encourage sustainable development by research and education. Assisting the traditional skills and materials sector to develop and grow in Scotland contributes to sustainable economic growth. Developing specialist conservation expertise in Scotland which is world – class in partnership with others provides opportunities in newly emerging technological fields, and in providing our expertise to others.
- 7.5 To help **people value, understand and enjoy the historic environment** we will promote an understanding of technological aspects of the built environment and how it relates to them via skills and materials.

RESOURCES

2008-09 £ (m)	2009-10 £ (m)	2010-11 £ (m)
2.660	2.731	2.803

OBJECTIVES

7.6 The aims of the Technical Conservation Group are to promote better technical understanding and care of the built environment, and to inform and sustain the conservation, repair and maintenance of the built environment.

7.7 In support of these aims, TCG has 6 key objectives:

Objective 1: Undertaking technical and scientific research

7.8 TCG will identify and deliver technical and scientific research against a wider Agency research strategy. There will be a programme of research covering technical issues relating to materials, skills, technologies, conservation – repair and maintenance issues.

Objective 2: Supporting the perpetuation and understanding of traditional building skills

7.9 TCG will evaluate skills and knowledge gaps, and facilitate development of qualifications and educational resources to address the issues.

Objective 3: Understanding and promoting the use and availability of traditional building materials

7.10 TCG will increase our understanding of traditional materials, and assist in identification of sources, encouraging the use of traditional building materials without interference in the marketplace.

Objective 4: Provision of specialist technical and scientific advice

7.11 TCG will provide specialist technical advice in support of Agency activities, and on a broader front where resources permit.

Objective 5: Provision of applied specialist conservation services

7.12 TCG will provide applied conservation services in stone and painted surfaces in support of Agency activities, and reasonably consider requests from external partners for conservation work so long as this does not interfere in the marketplace.

Objective 6: Delivery of technical education and outreach activity

7.13 TCG will encourage best practice in the conservation, repair and maintenance of the built environment, targeting key audiences and stakeholders using a range of techniques and approaches.

ACTIVITIES IN SUPPORT OF OBJECTIVE 1

Undertaking technical and scientific research.

- 7.14 We will develop a technical and scientific research strategy which aligns to a broader Agency research agenda. Delivery of research will be based on a mix of in – house, collaborative and commissioned research. The framework for TCG research should be issues relating to: traditional materials, building skills, technologies and conservation, as well as repair and maintenance issues.
- 7.15 We will deliver a technical research programme to address the lack of understanding and knowledge in the following areas:
- Energy efficiency of traditional buildings in response to climate change pressures, including the thermal performance of traditional construction – roofs, walls, and windows / doors in particular, in partnership with the Carbon Centre, Herriot Watt and Glasgow Caledonian University;
 - Embodied energy and carbon foot-printing of traditional buildings and materials.
 - Research into traditional materials conservation, to include ferrous metals, stone and vernacular materials in particular;
 - Partnership research with RCAHMS and Scottish Fire Services to improve the operational preparedness of fire incident crews, encourage ‘sensitive’ fire safety management of traditional buildings and to accurately record incidents to establish the real scale of loss to our built heritage; and
 - The digital documentation and technical interpretation of the built environment in partnership with Glasgow School of Art and the Cyark Foundation.
- 7.16 We will complete a Research Fellowship in historic shop fronts in 2009, and disseminate the knowledge gained.
- 7.17 We will continue to sponsor studentships and fellowships in partnership with Glasgow University, British Geological Survey, Scottish Stone Liaison Group, and Edinburgh University addressing issues relating to masonry conservation, repair and maintenance. The results of our research will be disseminated.
- 7.18 We will keep HS colleagues up to date with current technical research through delivery of in-house technical seminars.
- 7.19 We will continue to build our in-house scientific and technical capabilities to provide and encourage world–class technical expertise for the built environment in Scotland.

ACTIVITIES IN SUPPORT OF OBJECTIVE 2

Supporting the perpetuation and understanding of traditional building skills.

- 7.20 We will work with ConstructionSkills Scotland, the Scottish Qualifications Authority and Skills Development Scotland to map existing vocational building qualifications to identify gaps in provision relating to the traditionally constructed environment, facilitating the development of formal conservation

endorsements to traditional trades through the National Progression Award and Professional Development Award route. We will work in partnership with industry to facilitate this.

- 7.21 We will work towards establishing focus for traditional skills development in the Further Education framework by encouraging specialisms in traditional skills as part of the Scottish Credit and Qualifications Framework. We will partner with Glasgow Metropolitan College in funding a Teaching Fellow to further these aims.
- 7.22 We will continue to deliver the Heritage Lottery Fund Bursary Scheme for Masonry Conservation.
- 7.23 We will continue to deliver the HS Craft Fellowship Scheme, increasingly partnering with others to effect delivery.
- 7.24 We will establish and resource a forum for those involved in traditional building skills training in Scotland to enable collaboration, networking and project activity.
- 7.25 We will support the work of Scottish Stone Liaison Group and its Industry Training Group in advancing stone masonry training in Scotland.
- 7.26 We will maintain a sector skills agreement with ConstructionSkills Scotland.
- 7.27 We will work with Learn Direct and Build to continue to develop new and innovative learning activities appropriate to our sector. In partnership with Learn Direct and Build and Scottish Screen, put the Scottish Archive of Building Skills online in 2009 to increase understanding of traditional building skills.
- 7.28 We will represent Scottish interests on groups relating to the traditional building skills, including the National Heritage Training Group and the Conference on Training in Architectural Conservation.
- 7.29 We will deliver a small grants scheme to assist training and education in the building conservation, repair and maintenance sector in Scotland, with a focus on traditional building trades, and to complement the work of ConstructionSkills in this area.

ACTIVITIES IN SUPPORT OF OBJECTIVE 3

Understanding and promoting the use and availability of traditional building materials.

- 7.30 We will continue to work with Scottish Stone Liaison Group and British Geological Survey to identify sources of indigenous stone, and to quantify potential demand through building stone audits against a developing understanding of the role traditional materials have in sustainability.
- 7.31 We will partner with Orkney College to fund a Research Fellow looking at the sources and traditional uses of building stone in the Orkney Isles.

- 7.32 We will establish the Scottish Ferrous Metals Forum to inform and contribute to our research in this area.
- 7.33 We will maintain and develop the Agency's international profile in stone and ferrous metals in particular.
- 7.34 We will host the Scottish Traditional Buildings Forum to facilitate and develop a wider acceptance and understanding of vernacular materials and construction.
- 7.35 We will promote the understanding of the technical, socio-economic and sustainability factors in perpetuating and where necessary, re-introducing the supply of traditional materials, whilst encouraging projects which sustain and develop these without interfering in the market place.
- 7.36 We will publish a Scottish Traditional Building Materials volume to promote traditional materials to a wide audience and celebrate the range and diversity of Scotland's building materials, traditions and techniques. We will run a seminar event to coincide with this.

ACTIVITIES IN SUPPORT OF OBJECTIVE 4

Provision of specialist technical and scientific advice.

- 7.37 We will provide specialist technical and scientific advice in support of Agency activities and encouraging scientific techniques to best inform decision making processes. Where resources permit, we will consider extending this advice to external partners on a limited basis.
- 7.38 We will provide specialist technical and scientific advice in support of policy activity and setting standards.

ACTIVITIES IN SUPPORT OF OBJECTIVE 5

Provision of applied specialist conservation services.

- 7.39 We will provide in-house specialist conservation services in stone, painted surfaces and building investigation and documentation. This will include conservation work at Dunfermline Palace, Jedburgh Abbey, Melrose Abbey, Palace of Holyrood and Huntly Castle as part of our ongoing work programme.
- 7.40 Whilst Properties in Care of Scottish Ministers shall remain our priority, we shall consider requests for specialist conservation services from partners so long as this does not negate the market for the commercial sector.

ACTIVITIES IN SUPPORT OF OBJECTIVE 6

Delivery of technical education and outreach activity.

- 7.41 We will disseminate the results of our research through appropriate mediums, including printed and electronic media, and the provision of seminars and events.

We will develop an outreach strategy early in 2009. The benefits of education shall take precedence over income generation in this area.

- 7.42 We will deliver at least two technical seminars per annum. In 2008-09 these will include Energy Efficiency in Traditional Buildings, Digital Documentation of the Built Environment, the Conservation of Traditional Shop fronts, and Scottish Traditional Building Materials.
- 7.43 We will deliver a major technical conference in 2009.
- 7.44 We will continue to deliver technical outreach seminars to Local Authorities across Scotland.
- 7.45 We will work with PIC Education Unit to reach young people via development of curriculum based resources.
- 7.46 We will launch the digital INFORM House in 2008.
- 7.47 We will work to develop guidance for ecclesiastical buildings.
- 7.48 Scientific and technical staff will disseminate their work and expertise through specialist conferences.
- 7.49 We will provide a more focused technical enquiry service.
- 7.50 We will review the Building Resources Register for Scotland in 2009.
- 7.51 We will develop our Short Guide series to complement the INFORM series and our Technical Advice Notes.
- 7.52 We will develop the Technical Reference series to provide access to historic technical information to inform current conservation work.

BUSINESS IMPROVEMENT AND OTHER TARGETS

	2008 - 09	2009 -10	2010 -11
1. Number of research projects managed.	12	12	12
2. The number of publications, articles and media outputs delivered.	10	15	15
3. Number of outreach activities delivered	30	30	30
4. Volume of specialist technical advice provided	30	30	30
5. Number of HLF Bursaries awarded	30	50	50
6. Number of downloads of TC electronic media from HS website.	30,000	40,000	50,000
7. Number of applied conservation projects completed.	10	10	10

8

CORPORATE SERVICES

CONTEXT

- 8.1 Corporate services comprises **Finance** Group, Human Resources (HR) and the Chief Executive's Group. Finance Group is responsible for finance; procurement; information management; information and communications technology (ICT); and monitoring and reporting on performance, efficiency, best value and continuous improvement. **HR** is responsible for all aspects of personnel (including training and development); accommodation; support services; and health and safety. The **Chief Executive's Group** comprises Communications and Media Unit and a personal secretary responsible for managing the information flow through the chief executive's office.
- 8.2 We are very aware of the potential value of sharing services with other organisations in the area of corporate services. We already share in the Scottish Government's Information Technology infrastructure service – 'SCOTS' – at a cost of £660,000 per annum. This provides a secure and robust platform for the Agency. We collaborate with the Scottish Procurement Directorate (SPD) on appropriate procurement projects and to avoid duplication of purchasing effort where possible. We route our requirement, where possible, for all generic goods and services through Scottish Government framework agreements and collaborative contracts where these are advantageous. Historic Scotland also collaborates directly with others in the public sector (for example, English Heritage) over the purchase of goods and services which are specific to our needs. We take direct responsibility for other purchases where no effective collaborative arrangements exist.
- 8.3 We use the existing Scottish Government Temporary Staff contract and benefit from the rates offered under that contract. We are currently participating with the Scottish Government and a number of other agencies in various procurement led exercises that will lead to new contracts in a number of HR related activities including the provision of occupational health services, interim managers and executive search. We will utilise these contracts if they offer improved services and cost savings.
- 8.4 We also obtain legal services from the Scottish Government Legal Directorate and the Scottish Government retains responsibility for the HR management of senior civil service staff in the Agency. We will continue to seek other opportunities to share services where this will improve efficiency and effectiveness.
- 8.5 As part of Historic Scotland's ongoing commitment to continuous improvement, we are undertaking a review of Finance and Human Resource functions. The aim is to establish whether the current set up is the right one or whether there are other better ways of delivering the Finance and HR services. The review is in effect a health check to establish the best way of service delivery and will report in summer 2008. We are participating in a benchmarking exercise led by CIPFA which aims to compare performance of public sector organisations in

the fields HR, Finance, ICT, Procurement and Estates Management. The HR and Finance results will feed into and inform the Finance and HR functions review. A separate exercise for the other services will analyse the benchmarking results and identify areas for further action and improvement.

RESOURCES

	2008 – 09 £ (m)	2009 – 10 £ (m)	2010 – 2011 £ (m)
Chief Executive’s Group	0,575	0,594	0,613
Human Resources	3,783	3,829	3,876
Finance	2,140	2,202	2,266
TOTAL	6,498	6,625	6,756

OBJECTIVES

8.6 Corporate Services has 4 key objectives:

Objective 1: To facilitate and help to deliver continuous improvement in the performance of the Agency.

Objective 2: To promote the efficient and effective use of the financial and other resources of the Agency.

Objective 3: To deliver a professional and effective HR function (including health and safety and training and development) to Historic Scotland staff.

Objective 4: To protect the Agency’s reputation, engage with stakeholders to improve communications and raise awareness of the work of the Agency and the wider historic environment, and to deliver effective internal relations as part of the Agency’s commitment to involving staff.

ACTIVITIES IN SUPPORT OF OBJECTIVE 1

To facilitate and help to deliver continuous improvement in the performance of the Agency.

8.7 Historic Scotland’s new Framework Document, which sets out the key accountability arrangements between Ministers, the Scottish Government and the Chief Executive, was approved by Scottish Ministers in April 2008. Almost all of Historic Scotland’s activity contributes to sustainable growth – conserving properties in care; generating increasing income from visitors; effectively managing change in the historic environment; grant-aiding conservation; and providing guidance on effective conservation work. The new Framework Document therefore introduces three aims which encapsulate this work and which tie in well with the national outcomes:

- To care for, protect and enhance the historic environment;
 - To secure greater economic benefits from the historic environment; and
 - To help people value, understand and enjoy the historic environment.
- 8.8 Following the January 2008 announcement on the public sector landscape review, the Scottish Government plans further discussion during 2008 about how the new performance framework might change existing governance arrangements for agencies and NDPBs. We are ready to take part in this further discussion and recognise change to the framework document may be necessary in the light of this.
- 8.9 To assist in the continuous improvement process, we use the Best Value Self Assessment (BVSA) as our main diagnostic tool to identify areas for improvement. There are nine best value themes assessed on a four point scale – not yet planned, planned, under development and well developed. Our latest assessment points to us being well developed with five themes:
- Responsiveness and Consultation (Stakeholders);
 - Sound Management of Resources and Contractual arrangements;
 - Use of Review and Options Appraisal;
 - Sustainable Development; and
 - Joint Working
- 8.10 Those themes under development but with steady progress are:
- Commitment and Leadership;
 - Sound Governance;
 - Equal Opportunities Arrangements; and
 - Accountability.
- 8.11 We are committed to reviewing the BVSA each year with the next review scheduled for autumn 2008. Audit Scotland carried out an initial audit in 2006 and plan follow up work during 2008 to provide the Historic Scotland Board with independent assurance on best value progress.
- 8.12 We will continue to maximise the potential of Information Communications and Technology in line with the strategy for 2007-11 approved by the Senior Management Team in 2007. This provides for continuing with the SCOTS network and putting in place sound governance arrangements for projects. In terms of delivery, we will pursue a mixed economy between in-house development and consultants where external skills and knowledge are necessary. We will develop business continuity plans for our business critical processes, including retail, Edinburgh Castle ticketing and finance. A number of major systems developments are either under way or are candidates (subject to business case and funding) for 2008-11. These include e-planning, Inspectorate Casework Management, retail and ongoing developments of the Historic Scotland web site and geographical information systems (GIS).

8.13 As part of our wider commitment to sustainability, the Agency's environmental management policy adopted in 2006 requires us to:

- Continually improve environmental performance;
- Reduce the environmental impact of our operations;
- Promote resource efficiency;
- Promote best practice for the sustainable management of the historic environment across Scotland.

8.14 Future priorities include development of an environmental management plan for Edinburgh Castle, and possibly Stirling Castle, with particular emphasis on reducing carbon emissions.

8.15 Ministers receive letters from people about a wide range of aspects relating to the historic environment. Our Framework Document provides for the Minister to reply where the issue relates to strategic policy or performance and for the Chief Executive to reply on operational matters. We will ensure that all replies to Ministerial correspondence are clear, concise and courteous, and deal accurately with the issue of concern to the correspondent. The Scottish Government has set a target of 15 working days for replies Ministers' Private Offices from officials. We will aim to meet this target which applies also to replies from the Chief Executive.

ACTIVITIES IN SUPPORT OF OBJECTIVE 2

To promote the efficient and effective use of the financial and other resources of the Agency.

8.16 Finance Group has an ongoing obligation to provide prompt and accurate financial management information to Directors, the Senior Management Team and the Board and to provide financial advice and support to the other groups within the Agency and the Scottish Government.

8.17 Finance Group will co-ordinate, closely monitor and report on the Agency's programme of best value reviews and business area health checks aimed at meeting the 2% efficiency target set by the Scottish Government. This efficiency programme comprises many of the reviews referred to earlier in this plan. Finance Group will also assist in the identification of further projects for inclusion in the programme. Another key role is to scrutinise business cases to ensure they are robust and that sound project management is in place to ensure projects are delivered on time, within budget and to a high standard.

8.18 Finance Group will continue to co-ordinate, monitor and report to the Board and Audit Committee on progress in responding to risks identified in the Agency's Risk Register.

8.19 The Historic Scotland Audit Committee (HSAC) met for the first time under the chairmanship of a non-executive director in June 2005. Finance Group will lead a review of the operation of HSAC in 2009.

- 8.20 As a result of a lease break for Longmore House in 2009, Finance Group will take the lead in reviewing accommodation options in advance of the lease break.

ACTIVITIES IN SUPPORT OF OBJECTIVE 3

To deliver a professional and effective HR function (including health and safety and training and development) to Historic Scotland staff.

- 8.21 All staff are given the opportunity to comment on the level of service provided by HR and, for the 3rd year running, this has provided positive outcomes. In terms of overall service delivery during 2007-08 the satisfaction level was 90.5% and the overall satisfaction outcome was 85.4%. A review of the existing service standards and methods used to collect feedback is underway and the aim for 2008-09 is to revise these and conduct more targeted surveys by focussing on the service users and increasing the overall response rate to the survey.
- 8.22 HR is currently undertaking a best value review to examine the method of delivering the human resource functions and, following this, will undertake a programme of business improvement.
- 8.23 HR introduced on 1 April 2008 a new policy and procedure for managing attendance. This will be monitored to see what impact it has on reducing absence levels in the Agency, how it has provided improved support to those staff absent from work and whether it has resulted in efficiency savings during 2008-09 and beyond.
- 8.24 Work will continue in partnership with the recognised trade unions to put in place an alternative working patterns policy in 2008-09. The existing pilots covering a number of business areas will continue during 2008-09 and once these have been fully evaluated we will introduce an Agency-wide policy for all staff in autumn 2008.
- 8.25 We will continue to work with the recognised trade unions on the development of improved partnership working. A revised partnership agreement will be introduced during 2008-09. Work is already underway in preparation for negotiations with the recognised trade unions on a pay settlement and it is our aim to conclude these by the due date of 1 August 2008.
- 8.26 HR will also provide support and guidance to a range of initiatives that will contribute to the Agency's efficiency programme, including best value reviews and the introduction of e-recruitment.
- 8.27 Delivering the training and development plan for the Agency with a focus on people management. This includes a management development programme for all managers in the Agency as well as a leadership programme for senior staff. We will also carry out an internal Investors in People assessment to ensure that our policies and processes are still in line with best practice, continue to invest in the development of the health working lives initiative across the Agency and delivery training and development programmes to support the business objectives of the Agency.

- 8.28 Delivering the Agency's health and safety policy and keeping practices and procedures under ongoing review. In particular, we will continue to invest in improving the health and safety culture within the Agency by increased engagement and involvement with all staff through the health and safety committees at both a corporate level as well as within key business areas. A review of the Agency's accident reporting and investigation policy will also be undertaken to improve data collection and enable trends to be identified and the root causes of accidents and incidents.

ACTIVITIES IN SUPPORT OF OBJECTIVE 4

To protect the Agency's reputation, engage with stakeholders to improve communications and raise awareness of the work of the Agency and the wider historic environment, and to deliver effective internal relations as part of the Agency's commitment to involving staff.

- 8.29 Communications & Media will continue to work with groups across Historic Scotland to deliver effective e-services and develop the Agency's website. In 2008-09 this will include provision of on-line recruitment for HR and delivery of a range of micro-sites for PIC including Stirling Castle and a number of non-staffed properties to improve access and understanding.
- 8.30 Communications & Media provides a co-ordinating role for Agency publications to support other groups' publishing activities, maintain consistency of content and presentation, and ensure that publications are fit for purpose and achieve value for money. The steady move from hard copy to on-line publishing will continue including, for the first time, the Agency annual report and accounts.
- 8.31 Historic Scotland commissioned stakeholder research in 2003-04. The overall aim of the research was to examine attitudes towards the historic environment in Scotland and to consider how Historic Scotland's partners and stakeholders perceive the work of the Agency. We will seek to measure changes in attitudes and perceptions over a five-year period by commissioning further research in 2009.
- 8.32 Communications & Media, which has overall responsibility in Historic Scotland for the Agency's media handling, works with all groups to deal with media enquiries, protect the Agency's reputation and ensure that reporting of the Agency's work is fair and balanced. Historic Scotland has been taking a more proactive approach to informing stakeholders and the wider public of the work of the Agency and raising the general awareness of the historic environment. This trend will continue to grow during the period of the corporate plan.
- 8.33 Communications & Media will continue to provide support on internal communications across the Agency as part of BVSA to ensure that staff are kept informed and involved in the process.

KEY PERFORMANCE TARGET 2008-9

Cash-releasing efficiency gains on all non-grant expenditure of 2%.

BUSINESS IMPROVEMENT AND OTHER TARGETS

1. Delivering best value reviews/business area health checks for TCG, professional services, finance, human resources and marketing in 2008-09.
2. Initiating a further three best value reviews/business area 'health checks' in each of 2009-10 and 2010-11.
3. Implementing agreed recommendations arising from the corporate services benchmarking study (2008-09).
4. Participating in the delivery of IT enabled business improvement projects which will include:
 - Completing roll-out of the e-procurement by December 2008;
 - A new casework management system for the Inspectorate by March 2009;
 - Launch of the Historic Scotland Intranet in 2008;
 - Ongoing development of the Historic Scotland web site; and
 - Develop and roll out electronic admissions and retail systems by 2011.
5. Review the operation of the Historic Scotland audit Committee in 2009.
6. Ensuring at least 90% of Ministerial correspondence cases replied to within Scottish Government timescales.
7. Respond to all information requests within 20 working days in line with the Freedom of Information (Scotland) Act 2002.

9

SUMMARY OF KEY PERFORMANCE TARGETS 2008-09

To reach a view on 80% of scheduled monument consent applications within 5 weeks.
To reach a view on 97% of applications for listed building and conservation area consents within 28 days.
To reach a view on 70% of statutory planning consultations within 14 days in 2008-09 rising to 90% in 2009-10.
Issue 4 Scottish Historic Environment Policy papers in final form or for consultation.
Stirling Castle Palace Project main contract to be accepted and on site by end of December 2008.
Historic Scotland earned income - £25.879m million.
Performance rating from Mystery Visits Programme – 88.5%.
Performance rating from education visit appraisal forms – 93%.
Cash-releasing efficiency gains on all non-grant expenditure – 2%.