

Historic Scotland Corporate Plan 2008-11

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1. Introduction, Resources and Plan Summary

Historic Scotland is an Executive Agency of the Scottish Government. 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 mission of Historic Scotland is **to safeguard Scotland's historic environment and to promote its understanding and enjoyment**. In support of our mission, we will pursue five aims as set out in our Framework Document 2008. These are:

1. To care for, protect and enhance the historic environment;
2. To secure greater economic benefits from the historic environment;
3. To increase public appreciation and enjoyment of the historic environment;
4. To achieve continuous improvement in the performance of the Agency; and
5. To support the five strategic objectives of the Scottish Government.

The framework document 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.

This section of the Plan sets out the resources available to us and a brief overview of our work. The resources include estimates of the income we hope to generate to support our work. Our core activities are covered in sections 2 to 5:

- Policy Group;
- The Inspectorate;
- Properties in Care;
- Technical Conservation Research and Education; and
- Corporate Services

Each of these sections comprises context, objectives, activities and performance targets. Section 6 covers corporate support services including human resources, finance etc. Section 7 summarises our key performance targets set by Scottish Ministers for 2008-09 and section 8 summarises how Historic Scotland's work relates to the Scottish Government's five strategic objectives:

Wealthier and fairer;

Healthier;

Safer and stronger;

Smarter; and

Greener

Resources

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 set out in the table below:

| | 2008-09 £ (m) | 2009-10 £ (m) | 2010-11 £ (m) |
|------------------------------|------------------|------------------|------------------|
| Historic Scotland Allocation | | | |

Income Generation

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 | | | |

Total Funding Available

| | 2008-09 £ (m) | 2009-10 £ (m) | 2010-11 £ (m) |
|------------------------|------------------|------------------|------------------|
| Total Forecast Funding | | | |

Breakdown by Agency Group

| | 2005-06 £ (m) | 2006-07 £ (m) | 2007-08 £ (m) |
|-------------------------------|------------------|------------------|------------------|
| Policy Group | | | |
| The Inspectorate | | | |
| Properties in Care* | | | |
| TCRE | | | |
| Central Resources | | | |
| Capital Charges** | | | |
| Reserve | | | |
| Total Forecast Funding | | | |

*See table under Properties in Care for further breakdown

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

***Figures do not add up due to rounding

Efficiency – new section to cover efficiency agenda here?

Plan Summary

Policy and Advice to Scottish Ministers

Grants

Conservation at Properties in Care (PIC)

Tourism

Access and Enjoyment

Technical Conservation, Research and Education (TCRE)

2. Policy Group

Context

Policy Group provides the Scottish Government with **policy advice** on the historic environment, administers the **Historic Environment Grant Programme** and manages the interface with the **planning and environmental assessment** systems. 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) |
|------------------|------------------|------------------|
| | | |

Objectives

The Group has 4 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 ensure that Development and other strategic plans prepared by public authorities contain robust policies for the protection and 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.

Objective 4: 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

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, HS 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.

As required by the 2004 Framework Document, HS is developing Ministerial and operational policies. In 2008-11 the priority will be to complete the process of reviewing and updating strategic policies on the historic environment – the *Scottish Historic Environment Policy* (SHEP) series. The SHEP documents will continue to be developed in consultation with stakeholders.

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 CP 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 CP 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 CP 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.

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, including developing and implementing management plans for our existing World Heritage Sites and progressing the nomination of the Antonine Wall as a World Heritage Site and taking forward the implementation in Scotland of the Hague Convention for the protection of cultural property in the event of armed conflict.

Activities in Support of Objective 2

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

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 | Subject to review | Subject to review | Subject to review |
| Voluntary Sector | Subject to review | Subject to Review | Subject to Review |
| Ancient Monuments | Subject to review | Subject to Review | Subject to Review |

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**. 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.

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 building projects on the local community supported by Historic Scotland after the significant changes introduced in 2005.
- 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 reuse.
- Continuing to support through grant and practical aid to enable the voluntary sector to work effectively in the historic environment field.

Activities in Support of Objective 3

To ensure that Development and other strategic plans prepared by public authorities contain robust policies for the protection and 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.

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);
- 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 Act 2006

Activities in Support of Objective 4

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.

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.

Over the last CP 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 HE 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.

Operational Targets

1. Achieve a closer proportionality between % of grant spend per local authority compared with % 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. Meet statutory deadlines on cases referred to Historic Scotland under the planning and environmental assessment regimes.

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3. The Inspectorate

Context

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.

Its work 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 historic merit. The Inspectorate also administers the Agency's archaeological grant-aid schemes covering archaeology, ancient monuments and archaeological management agreements.

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 2007, development plans and environmental assessments, and a range of other work.

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 local planning authorities in the management of the historic environment against the backdrop of a concordat 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.

Resources

Laura/Donna to add

Objectives

The Inspectorate has 5 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 non-statutory 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 wrecks.

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.

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.

Historic Scotland undertakes four areas of designation: listing of historic buildings, scheduling of archaeological sites and monument, designation of 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, local authorities and local societies.

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. In addition the team will undertake thematic surveys including Basil Spence's work, historic theatres, Scottish water facilities and Cold War structures.

Scheduling: Over the plan period the team will undertake work in eastern Dumfries and Galloway, East Renfrewshire, Renfrewshire and Inverclyde, the Isle of Mull and Fife. It will also complete the thematic review of the Antonine Wall and audit of Roman temporary camps in Scotland.

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 web-site 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.

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. Work on developing and implementing the policy and strategy will continue across the plan period.

Activities in support of Objective 2

To provide statutory and non-statutory 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 wrecks.

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 and designated wreck sites. They usually deals with c.250 scheduled monument consent applications each year, and comment on c.3,000 consultations and notifications from local authorities on proposed works affecting listed buildings, scheduled monuments, gardens and landscapes and designated wrecks.

As part of the wider planning reform and related improvements, the Inspectorate is undertaking a series of improvements across the plan period. This includes facilitating eConsultation as part of the Scotland-wide ePlanning initiative, and the introduction of a concordat with local authorities setting out respective roles and responsibilities for managing the historic environment. We will also pilot a scheme of delegation to local authorities for minor works to category B-listed buildings, and replace the *Memorandum of Guidance on Listed Buildings and Conservation Areas* with a new series of leaflets and information on guidance and best practice for managing change in the historic environment which will also be available on line. To support the management of the statutory casework more generally, 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.

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. It 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.

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.

In 2007-08 a review of the three grant streams (the Ancient Monuments Investment Review) was undertaken, and incorporates 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.

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 wrecks 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 and on PASTMAP (a joint initiative with the Royal Commission on Ancient and Historical Monuments of Scotland (www.pastmap.org.uk)). Wider research also includes the Historic Landscape 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, the Inspectorate has introduced a number of initiatives including assigning one of its expert staff to work in the team at the Scottish Government designing and implementing Scotland's Rural Development Programme and has also joint-funded a heritage officer post at British Waterways Scotland.

The Inspectorate is also working closely with the Royal Commission on the Ancient and Historical Monuments of Scotland on the joint Historic Land-use Assessment project which is mapping the historic origins of land-use across Scotland. This will become a key element for understanding, promoting and managing change involving Scotland's historic landscapes.

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, over the plan period 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 web-site.

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.

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.

The Inspectorate will also 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. This will include contributions to the Scotland's Historic Environment Policy series (SHEPs), changes to secondary legislation relating to the Planning Etc (Scotland) Act 2007 and a variety of other initiatives.

Key Performance Targets 2008-9

1. Scheduling. Assessment of 27 parishes in Eastern Dumfries and Galloway, East Renfrewshire, Renfrewshire and Inverclyde.
2. Listing. Stow, Edinburgh Ward, Perth Burgh (part 1) and Stewarton, East Ayrshire.
3. Percentage of scheduled monument consent cases resolved within 9 weeks: target 80%; and
4. Percentage of listed buildings and conservation area consent cases resolved within 28 days: target 97%.

Key Operational Business Improvement Targets

1. To design and implement a concordat with Scottish local planning authorities: target - 3 pilot schemes in 2008/09 with a notional target of 34 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 2008/09 with wider implementation in 2009/10.
6. To develop and implement a corporate strategy for designation, protection and promotion of Scotland's marine archaeological resource: target – over the plan period.

7. To implement changes to the archaeological, ancient monuments and management agreement grants programmes in light of the 2007/08 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.

4. PROPERTIES IN CARE

Context

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.

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 branches has clear aims and objectives, co-ordination and communication across Properties in Care is vital in achieving our objectives.

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.

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. We now aim to formalise our processes and introduce a means of assessing how many of our prioritised planned projects are started within each year, with a target of 75% in the year 2008 – 09.

The branch of Understanding and Access will be established within Properties in Care in early 2008 and will incorporate existing teams such as Education, Interpretation and Cultural Resources, and the newly welcomed Collections and Photography team. 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.

Resources

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 | | | |
| Visitor Services and Business Development | | | |
| Understanding and | | | |

| | | | |
|----------------|--|--|--|
| Access | | | |
| Major Projects | | | |
| TOTAL | | | |

Objectives

Properties in Care's objectives are aligned to the Framework Documents five aims:

- To care for, protect and enhance the historic environment
- To secure greater economic benefits from the historic environment
- To increase public appreciation and enjoyment of the historic environment
- To achieve continuous improvement in the performance of the agency
- To support the five strategic objectives of the Scottish Government.

Properties in Care's annual business planning is based around the Framework Document aims, helping us to clearly report how the delivery of PIC objectives relates to the overall aims of the Agency.

Activities in Support of Objective 1:

To care for, protect and enhance the historic environment

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.

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.

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.

Monument Management Plans are being developed as a framework to map the information each Branch within PIC uses to inform decision making. 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 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. The MMPs will support an audit trail of prioritisation and project decision making for PIC's work at each site.

The Cultural Resources team will maintain interim statements of significance, a programme to roll out full statements over the coming years will develop from the Research Strategy to be published.

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 underpins the cross-agency commitment to preserving these unique monuments.

The Sites and Monuments Record will be completed with the archaeological data enhancement for a cross-section of 50 PICs, small to large by 2009.

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.

Activities in Support of Objective 2:

To secure greater economic benefits for the historic environment

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 £27,899,000 by March 2011, an increase of 14% over the period of the plan.

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. And 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.

Edinburgh Castle's state of the art visitor reception is opening 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. Visitors' initial impression of the Castle will be much improved with the removal of the mobile ticket office currently on the esplanade. A new terrace and gathering area will offer spectacular city views, and reduce the congestion on the esplanade. In line with this project, a new Edinburgh Castle website has been developed with information on the key attractions and daily events guide. The success of these online measures, and the effect of the new visitor reception on visitor satisfaction as well as visitor numbers and income will be closely monitored over the duration of the plan.

An Edinburgh Castle brand identity has been developed 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.

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. It is hoped work will be completed in 2011. This project is 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. Work on the “Hunt of the Unicorn” tapestries will continue throughout this period, due to be completed in 2013.

We will work in partnership with Destination Management Organisations and other heritage associations such as the Historic Properties Group which comprises Historic Scotland, Historic Houses Association and the National Trust for Scotland, to maximise benefits and opportunities across the heritage tourism sector.

Activities in Support of Objective 3:

To increase public appreciation and enjoyment of the historic environment

The Understanding and Access branch will be established in 2008 to provide a central focus for all elements relating to information and presentational aspects of our work. This branch incorporates Cultural Resources, Interpretation, Education and Collections and Photography. This structure will enable easier communication and provide an integrated approach to these areas across the estate ensuring all visitors leave having furthered their knowledge and interest in the historic environment.

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.

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% by 2011.

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.

Joint working with other tourism operators will continue to be important, in particular growing our relationships with the National Trust for Scotland and the Historic Houses Association. An Action Plan to help the heritage sector respond to changes in the tourism market will be drawn up following the publication of a major piece of joint research in May 2008.

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 the properties in HS care. These will include family trails and living history events which bring the past to life.

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.

As mentioned above the Stanley Mills Reception, Education and Community Facilities project will open 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. Scale models of water wheels will challenge people to control water flow and the factory scene will be brought to life through smell, heat and noise. This interpretation will be monitored and its effectiveness assessed.

Activities in Support of Objective 4:

To achieve continuous improvement in the performance of the agency

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 maximising our skills within Historic Scotland.

We will continue to conduct a series of healthchecks throughout the organisation to ensure we are working in the most efficient ways. Following on from a number of commercial services healthchecks, which have led to streamlining of services, a marketing healthcheck is scheduled to begin in 2008. The healthcheck process will continue throughout the duration of the report.

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.

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.

During the coming year the collections unit will take the lead of preparing the agency's application to the Museum's, Libraries and Archives council for museum accreditation status – the nationally recognised standard for collections care. 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 support the other policies of the Scottish Government.

Sustainability is at the heart of everything which Historic Scotland does, including the conservation and presentation of the properties in its care. 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. HS properties are inspected through the Green Tourism Business Scheme and are assessed on how well they limit their effect on the environment. HS 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.

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.

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.

The Interpretation Unit will develop a Communities Strategy aiming to build a programme of partnerships, events and activities around the country to involve communities in their local heritage.

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

Note some of these targets relate to the whole plan period. Need to convert to annual (but still keep 3-year target too?)

- KPT 1** Planned progress in 75% of programmed high priority conservation projects each year.
- KPT 2** Total earned income of £27.899m by 2011
- KPT 3** Performance rating of 89.1% from mystery visits by 2011
- KPT 4** Performance rating of 93% from educational visit appraisal forms
- KPT 5** Publication of the Heart of Neolithic Orkney World Heritage Site Management Plan in 2008.

Key Operational Business Improvement Targets

- U&A** Achieve a target of 73,000 visits through the free educational visits scheme by March 2011
- U&A** 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
- U&A** 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
- U&A** Development of two PIC Microsite web sites in 2008.

- U&A** The Sites and Monuments Record will be completed with the archaeological data enhancement for a cross-section of 50 PICs, small to large by 2009.
- U&A** Develop eight guidebooks in line with the guidebook programme.
- U&A** Publish a PIC archaeological research strategy by March 2009
- U&A** Achieve Museums Libraries and Archives Council accreditation by 2011; develop strategy for individual site accreditation
- VSBD** Consolidation of visitor numbers to consistently achieve 3,108,747 by 2011
- VSBD** Achieve a Value for Money rating of 78% by 2011
- VSBD** Grow membership numbers to 90,000
- VSBD** 88% of sites achieving 4 or 5 star visitor status by 2011
- VSBD** Develop and roll out electronic admissions and retail systems by 2011
- VSBD** 45% of admission sales to Edinburgh Castle sold in advance
- VSBD** Establish a volunteering scheme at Stanley Mills
- C&M** Review of Ancillary Accommodation for Asset Management Register to be completed by 2011
- C&M** Best value review of professional services
- C&M** Complete roll-out of incident response framework across PIC by 2011
- C&M** Agree implementation strategy arising from Health and Safety risk assessments and create a programme of works to be completed by March 2011
- MP** To officially open and complete post-project evaluations for projects at Edinburgh Castle and Stanley Mills
- To successfully appoint contractors and undertake programmed site works for Stirling Castle Palace Project
- MP** Produce and actively manage a prioritised programme of capital projects across the estate.
- MP** To prepare a business plan and option appraisal identifying an approved solution for replacement visitor facilities at Maesehowe

5. Technical Conservation, Research and Education

Context

The built environment requires appropriate knowledge, skills and materials to ensure it is appropriately repaired and maintained for current and future generations.

In many areas our understanding remains limited, and we continually face new pressures to safeguard the built environment. The impacts of climate change on the built environment must be better understood, and more urgently how the traditionally built environment can contribute to mitigating climate change effects. 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 footprinting of traditional materials and building practices to achieve a fuller understanding of the issues.

Whilst we have learned much in relation to traditional materials and technologies, there are extensive gaps in our knowledge. These still need to be filled, and the results of our research extended to others.

We have made progress in raising standards across the repair and maintenance sector where we have worked with a wide range of partners, and we shall continue to build on those strategic partnerships.

The provision of traditional building skills to an appropriate standard is an ongoing challenge. We have a role to play in working with others who are keen to raise standards and support delivery mechanisms to ensure that training opportunities continue to arise, that vocational resources exist for training providers to use, and educational establishments are better able to service the recognised needs.

Objectives

TCRE has 5 key objectives:

Objective 1: To continue to increase our understanding and promotion of traditional building materials, skills and technologies to inform and enhance our stewardship of the built environment.

Objective 2: To seek to raise standards and quality across the sector in partnership with others.

Objective 3: To seek to maintain access to, and the availability of, traditional materials and skills.

Objective 4: To actively disseminate information and promote understanding through education and training, using a variety of techniques and mediums.

Objective 5: To provide world class technical expertise in the conservation, repair and maintenance of the built environment.

Activities in Support of Objective One

To continue to increase our understanding and promotion of traditional building materials, skills and technologies to inform and enhance our stewardship of the built environment.

TCRE will:

Develop, monitor and deliver our strategic research plan appropriate to Scottish needs, relating this to the Agency research strategy and the activities of English Heritage, Cadw, Department of the Environment Northern Ireland through the British Isles Technical Forum, and other key partners, such as Scottish Building Standards Agency to ensure added value.

Ensuring added value, 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.
- Embodied energy and carbon footprinting of traditional buildings and materials.
- Material research into traditional materials, to include ferrous metals, stone and vernacular materials.
- The digital documentation, technical interpretation and promotion of the built environment.

Complete Research Fellowships in architectural ironwork and historic shopfronts, and identify other areas of technological research for Fellowships to be awarded.

Continue to sponsor Studentships in partnership with Glasgow University, British Geological Survey and Edinburgh University addressing issues relating to masonry conservation, repair and maintenance.

Work with external partners to develop and deliver online training and educational access to archive film footage of traditional materials and skills to aid the understanding of the technologies through the Online Scottish Traditional Building Archive project.

Update and enhance our existing technical research and guidance as resources permit.

Activities in Support of Objective Two

To seek to raise standards and quality across the sector in partnership with others.

TCRE will:

Continue to work with Scottish Building Standards Agency and Architectural Policy Unit to identify and promote the needs of the traditionally constructed environment.

Building on the success of the National Progression Award in Masonry Conservation, in partnership with others we shall 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 establish a focus for traditional skills development in conjunction with Glasgow Metropolitan College through the placement of a Teaching Fellow.

Continue to develop the pan-professional Edinburgh Group, and its associated York Group to assist a cohesive approach to be adopted in the Accreditation of professional building conservation expertise, supporting the associated website www.understandingconservation.org.

Explore with the relevant bodies, potential to encourage higher standards of repair and maintenance through the financial services industry.

Continue to develop our relationships with education and training providers, sponsoring awards in order to raise technical and professional standards.

Contribute to the development of national technical standards and guidance with a range of internal and external partners.

We will continue to provide technical advice and guidance to Ministers and Scottish Government colleagues in accordance with our objectives.

Support bodies who have mutually compatible aims and objectives in raising standards, notably the Scottish Stone Liaison Group, the Scottish Lime Centre Trust, The Scottish Traditional Buildings Liaison Group and COTAC.

Represent Scottish interests in relevant national and international groups relating to the built environment.

Activities in Support of Objective Three

To seek to maintain access to, and the availability of, traditional materials and skills.

TCRE will:

Deliver actions arising from the response by Scottish Ministers to the HEACS Skills and Materials report, and assist in the delivery of the recommendations in the Construction Skills - National Heritage Training Group 2007 Scottish Skills Audit Action Plan.

Continue to deliver HS TCRE Craft Fellowships and HS TCRE Research Internships in appropriate themes.

Deliver a small grants scheme to assist training and education in the conservation, repair and maintenance sector in Scotland.

Deliver the Heritage Lottery Fund Bursary Scheme in Masonry Conservation.

Help to develop innovative learning and training solutions to address the particular needs of our sector, building on our previous research.

Host the Scottish Traditional Buildings Liaison Group to facilitate and develop a wider acceptance and understanding of vernacular construction.

Promote the understanding of the technical, socio – economic and sustainability factors in perpetuating and where necessary, re-introduction of the supply of traditional materials, whilst encouraging projects which sustain and develop these.

Host the Scottish Conservation Forum for Training and Education, bringing together those with an interest in training and education for the traditionally built environment in Scotland.

Deliver an annual event to celebrate training and education activities in Scotland, and to highlight the progressive work of the Group within Historic Scotland in this regard.

Activities in Support of Objective Four

To actively disseminate information and promote understanding through education and training, using a variety of techniques and mediums.

TCRE will:

Continue to publish sound research and technical guidance on a range of subjects in formats suited to end use, including paper, CD Rom, DVD and web based media, extending our use of electronic learning mediums.

Deliver the INFORM Interactive House to assist building owners maintain their traditional buildings, and extend the use of electronic learning resources.

Extend the range of Short Guides to fill gaps between our technical publications and the accessible INFORM series.

Publish a 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.

Deliver a major technical conference in 2009, with a number of one day technical seminars in other subjects, including digital documentation of the built environment.

Continue to engage local authorities and their staff in the delivery of technical seminars to promote, inform, update knowledge, and guide our research and education activities.

Participate in events where we can engage with our client base, including conferences, trade shows and other public events.

Provide an enquiry service, handling around 1500 public enquiries each year on technical matters, providing information on specialist contractors, consultants, and in identifying sources of traditional materials, education and training provision.

Activities in Support of Objective Five

To provide world class technical expertise in the conservation, repair and maintenance of the built environment.

TCRE will:

Continue to extend our specialist technical expertise in a range of areas, including ; stone, the performance of traditional buildings, ferrous metals, painted surfaces, conservation science, fire management and issues relating to climate change.

Provide specialist technical advice to our Historic Scotland colleagues in Properties in Care, Policy Group and the Inspectorate where specialist knowledge can be of benefit to the historic environment with the Inspectorate and Policy Group.

Where appropriate, disseminate the knowledge gained in this work through our educational programme.

Work with PIC's Education Team to promote technical aspects of the built environment to a wider audience through curriculum opportunities.

Continue to play host to students and specialists to share and enhance our expertise.

Key Operational Business Improvement Targets

The number of training and education grants awarded.

The number of publications and media outputs delivered.

Volume of technical enquiries responded to.

Measure of outreach activities delivered.

Specialist technical advice provided.

Number of downloads of TCRE electronic media.

6. Corporate Services

Context

Historic Scotland provides a range of essential services to support the aims, objectives and targets of the Agency. These include:

- Media and Communications
- Human Resources (HR)
- Health and Safety (H&S)
- Training and Development (T&D)
- Finance
- Procurement
- Information and Communications Technology (ICT)
- Information Management
- Facilities and Environmental Management

The overall goal is to provide quality support in pursuit of core objectives at optimal cost. This means ongoing review and constant challenge to the way we deliver these services in pursuit of continuous improvement. We aim to maximise the potential of ICT throughout our activity – a recent example is the roll-out of e-Procurement across the Agency. We operate a mixed economy in terms of service delivery with external specialist skills and knowledge supplementing in-house expertise.

Objectives

Under the umbrella of corporate services, we have set X objectives as follows:

To discuss with Brian and Laura – we need to keep this tight – perhaps no more than 6-8?
Otherwise this section could get out of control.

Perhaps clear the principle of this section with John before going further?

Key Operational Business Improvement Targets

We could have a fairly extensive list here?

7. Key Performance Targets 2008-09

1. Scheduling – Assessment of 27 parishes in Eastern Dumfries and Galloway, East Renfrewshire, Renfrewshire and Inverclyde.
2. Listing – Stow, Edinburgh Ward, Perth Burgh (part 1) and Stewarton, East Ayrshire.
3. Percentage of scheduled monument consent cases resolved within 9 weeks – 80%
4. Percentage of listed building and conservation area consent cases resolved within 28 days – 97%
5. Condition surveys at Properties in Care - to review conservation strategy and update priorities – 27
6. Historic Scotland earned income - £24.237million
7. Performance rating from Mystery Visits Programme – 88.2%
8. Performance rating from education visit appraisal forms – 93%
9. Cash-releasing efficiency gains on all non-grant expenditure – 1%
10. Policy - Issue 4 Scottish Historic Environment Policy papers in final form or for consultation

8. **How Historic Scotland’s activities relate to the Scottish Government’s 5 strategic objectives**

Strategic Objective 1

WEALTHIER AND FAIRER

Enable businesses and people to increase their wealth and more people to share fairly in that wealth.

| What we will do? | What will the outcome be? |
|------------------|---------------------------|
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Strategic Objective 2

HEALTHIER

Help people to sustain and improve their health, especially in disadvantaged communities, ensuring better, local and faster access to health care.

| What we will do? | What will the outcome be? |
|------------------|---------------------------|
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Strategic Objective 3

SAFER AND STRONGER

Help local communities to flourish, becoming stronger, safer place to live, offering improved opportunities and a better quality of life.

| What we will do? | What will the outcome be? |
|------------------|---------------------------|
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Strategic Objective 4

SMARTER

Expand opportunities for Scots to succeed from nurture through to life long learning ensuring higher and more widely shared achievements.

| What we will do? | What will the outcome be? |
|------------------|---------------------------|
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GREENER

Improve Scotland's natural and built environment and the sustainable use and enjoyment of it.

| What we will do? | What will the outcome be? |
|------------------|---------------------------|
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