

Historic Scotland's support
for the Voluntary Sector

Operational Policy



1. Historic Scotland

Historic Scotland is an executive Agency of the Scottish Executive. Our mission is to safeguard Scotland's historic environment and to promote its understanding and enjoyment. The Agency is directly responsible to Scottish Ministers and carries out its functions on their behalf.

2. Policy Aim

The voluntary sector is a core part of Scottish community life: 50,000 voluntary organisations bring together around one million volunteers and 100,000 paid staff, all seeking to make Scotland a better place. Scottish Ministers recognise the added value that voluntary organisations can bring to public services and community life and they have outlined their vision for the voluntary sector. Their vision is of a vibrant, sustainable, strong and independent sector, which from its position of strength in communities is able to play to its strengths, and build its voice and capacity to deliver.



3. The Voluntary Sector and the Historic Environment

3.1 Voluntary organisations have a long history of supporting the conservation of the historic environment. For example, the Society of Antiquaries in Scotland was founded in 1780; the Society for the Protection of Ancient Buildings was founded by William Morris in 1877; the National Trust (in England) was founded in 1895; the National Trust for Scotland was set up in 1931; and the Scottish Civic Trust was established in 1967.

3.2 Voluntary organisations, in their widest sense, play a range of roles in the historic environment:

- ❖ As curators and regenerators of the historic environment – some voluntary organisations have in their care nationally and/or locally important historic treasures;
- ❖ As champions for the historic environment – some voluntary organisations campaign for the protection of, and investment in, the historic environment. Seeking to shape the development and implementation of public policy, thus helping to make the policies and practices developed by government more responsive to the needs of the historic environment;
- ❖ As representative organisations – some voluntary organisations have been set up to represent their members' interests whether as owners of historic environment assets or as people with an interest in the historic environment or to represent their members' professional interests;
- ❖ As service delivery agents, providing services on behalf of government, where it is recognised that they are better able to do so;
- ❖ As a professional research and advisory service;
- ❖ In developing knowledge and skills;
- ❖ As educators in making the public aware of heritage issues;
- ❖ As catalysts for regeneration through the work of Building Preservation Trusts;
- ❖ As a focus for volunteering – tens of thousands of people volunteer across Scotland every day and it is an activity where everyone has something to contribute and everyone has something to gain. Voluntary organisations provide opportunities for people to become involved in the historic environment sector, through educational activities, surveys and excavations and in the provision of professional services for the restoration of historic buildings.

4. Historic Scotland's Investment Objectives

4.1 Historic Scotland's investment in the voluntary sector is targeted at projects and organisations that can help the agency meet the following corporate objectives:

- ❖ 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 ensure that the historic environment delivers benefits for communities;
- ❖ To promote and develop knowledge and skills;
- ❖ To build capacity in the historic environment sector.



5. Delivering Investment in the Voluntary Sector

5.1 Historic Scotland recognises that we can often be the largest single source of funding for voluntary historic environment organisations. We therefore aim to manage our investment in a way that is responsive to the needs of grant recipients. We also seek to make the processes underpinning our investment open, transparent and efficient.

5.2 In particular, we shall:

- ❖ make available on Historic Scotland's website, information on the funding opportunities available and how to apply;
- ❖ have a single point of entry for grants funding for voluntary sector organisations;
- ❖ ensure that the timing and method of payments suit the grant recipient whilst still meeting audit requirements;
- ❖ review, in consultation with grant recipients, the funding conditions and monitoring systems that apply to our grants. We want to ensure that they are appropriate and proportionate while still recognising the need to account for public sector funding;

5.3 At present, Historic Scotland provides funding to voluntary organisations in two ways: core funding and project funding. Core funding provides financial assistance for the "core" activities of organisations where they have a continuing role in the delivery of particular policy objectives. This has proved successful in enabling certain organisations to develop their expertise in particular areas. Project funding provides financial assistance to enable the completion of specific projects.

5.4 In keeping with the Scottish Executive's Strategic Review, and in order to move towards an investment culture of funding, Historic Scotland has removed the distinction between "core" and "project" funding. Instead, our funding is aimed at securing agreed outcomes and objectives and is made on a "full cost recovery" (FCR) basis.

5.5 Historic Scotland will make funding available on a 3-year basis where the agreed outcomes cover that length of investment.

5.6 We will ensure that voluntary organisations that receive our support have the appropriate information available to them on Full Cost Recovery including examples of how FCR principals work in practice.

6. Establishing Priorities

6.1 We are aware that the historic environment sector has many small organisations sharing the same goals and aspirations. In light of the Efficient Government initiative we would wish voluntary organisations supported by Historic Scotland to consider whether there is scope for them to consider merging or undertaking some form of sharing of common services. We have been interested that a number of voluntary groups have discussed with us the possibility of shared services such as administrative staff or use of equipment. We will consider short-term funding to enable heritage organisations to share, merge, or integrate their functions or work in partnership.

6.2 Historic Scotland provides support for local initiatives that contribute to the agency's ability to deliver benefits to communities. At the current time only some of Historic Scotland's grant schemes, such as the Archaeology Grants Programme, are open to local organisations. Other grants schemes, such as the Heritage Grants Scheme, have only considered applications from organisations carrying out activities in more than one local authority area. There is a case for supporting local schemes, for example where an innovative approach is being developed that has the potential for more widespread application. Therefore, in conjunction with local authorities, we will take forward strategies to support local and community initiatives.

7. Administration of the Heritage Grants Scheme

7.1 Historic Scotland is committed to finding ways of reducing the time taken to make decisions and improving the service provided to applicants under the Heritage Grants Scheme.

7.2 We will introduce new administrative arrangements that would require applications for grant from Historic Scotland to be submitted by 30 September in each year with decisions announced by 30 November. Grant would be payable from the following April for up to a period not exceeding 3 years.

7.3 Formal offers of grant will be based on the agreed Scottish Executive model conditions. These formal offers would contain the outcomes agreed between Historic Scotland and the voluntary organisation allowing Historic Scotland to measure performance during the period covered by the offer.

7.4 Historic Scotland has a small sponsorship fund which currently operates on a first come first served principle. It is used to support various non-recurring events throughout the year. The fund supports many diverse projects, with applications being accepted throughout the year e.g. sponsorship of conferences and publications. We will introduce new arrangements where applications that meet our new agreed priorities would be considered three times a year and decisions would be made within one month. We will also provide additional publicity for the scheme. However, we would not expect recipients of grant under any other stream of grant assistance from Historic Scotland to apply to the sponsorship fund.

8. Conclusion

8.1 Grants to voluntary bodies are an essential part of wider efforts to safeguard Scotland's historic environment and promote its understanding and enjoyment.

8.2 Historic Scotland is committed to supporting the sector and driving forward progressive change through;

- ❖ moving towards an investment culture;
- ❖ developing Full Cost Recovery practices and thereby realistically costing service provision
- ❖ developing meaningful partnerships between the public and voluntary sectors;
- ❖ improving support services;
- ❖ by making funding sources easier to identify