ACTION PLAN
2020-21

Published in April 2020 in lieu of our Annual Operating
Plan in response to the COVID-19 outbreak

HISTORIC
ENVIRONMENT
SCOTLAND

ÀRAINNEACHD
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INTRODUCTION

In light of the COVID-19 outbreak facing Scotland and the world, we have revised our workplan for the immediate future to address the direct impact of the outbreak on our organisation and to ensure that we are able to maximise the resources still available to us to contribute to our Corporate Plan, the Scottish Government's National Performance Framework and the wellbeing of everyone in Scotland and abroad at this difficult time.

This document contains our plan for continuing to operate as best we can over the next six months and outlines how we will work over the immediate period to monitor the situation and plan for resuming our core activities when appropriate.

WHO WE ARE AND WHAT WE DO

The historic environment *is* Scotland's story.

It belongs to all of us. It is part of our everyday lives. It shapes our identity. It tells us about the past, the present – and even points the way to the future.

We are a charity and public body leading the way in protecting, understanding and sharing Scotland's historic environment, for today and for the future.

We want the historic environment to make a real difference to people's lives: to our health, to our economy, to our culture, to our environment. We want heritage to involve everyone so that all can benefit.

Through our own activities and our work with our partners and stakeholders, we ensure that the historic environment thrives and delivers economic and social benefits for the people of Scotland.

Our core activities span a range of functions:

- We care for more than 300 sites of national importance all across the country and are the largest operator of paid visitor attractions in Scotland.
- We look after internationally significant archives and artefacts.
- We are at the forefront of investigating and researching the historic environment and addressing the impacts of climate change on its future.
- We protect our historic places through designations and consents, promote their sustainable development, and provide millions of pounds each year to local communities to repair and revitalise their historic environment.
- We provide advice and guidance about the historic environment and offer a wide range of training and learning opportunities.

In every aspect of our work we strive to follow our five organisational values – we are collaborative, professional, innovative, open and respectful.

SUPPORTING SCOTLAND'S WELLBEING

Through our work, we support the wellbeing outcomes in the Scottish Government's National Performance Framework. Our Corporate Plan for 2019 onwards, *Heritage For All*, sets out five outcomes to ensure the historic environment is cherished, understood, shared and enjoyed with pride, by everyone:

1. The historic environment makes a real difference to people's lives

2. The historic environment is looked after, protected and managed for the generations to come

3. The historic environment makes a broader contribution to the economy of Scotland and its people

4. The historic environment inspires a creative and vibrant Scotland

5. The historic environment is cared for and championed by a high-performing organisation

The link between these outcomes and the National Outcomes in the National Performance Framework can be found in our Corporate Plan.

In these difficult times, we still recognise the value we can have to support our outcomes. With the closure of our sites and instruction from Government to work from home, we will not be able to continue some of the work we normally do. But we do have an opportunity to shift our resources to ensure that we focus our staffing resources on the activities that will add the most value to supporting our outcomes at this time. This includes improving and promoting our online resources and social media to support people through this period of isolation. Working across the organisation and sector, we will develop our thinking on the big issues that are facing the organisation and the sector such as climate change. We are also focusing on using digital capability to develop our staff and improve our internal practices and processes.

CHALLENGING TIMES

The world is facing challenging and unprecedented times in recent history as borders are closed and vast sections of our economy are effectively shutdown. The outbreak of COVID-19 has had impacts across the world and Scotland is no different.

To preserve the lives, health and safety of our visitors and staff, and to comply with the instructions of the UK and Scottish Governments in relation to physical distancing, the holding of events and gatherings and access to premises, all of our staffed properties in care and offices were closed with effect from 5pm on 18 March 2020 and remain closed, in compliance with relevant Scottish Government legislation.

Our focus is to do everything possible to protect the safety of all our visitors, staff and partners. We will continue to operate the rest of our core activities as far as possible, however extended closure of our sites will have an impact on the financial resources available to the organisation and we need to revise our workplan accordingly.

We also know that we provide a service of great social importance and we will focus our energies in this period of disruption on the areas where we can add the most value to the wellbeing of Scotland. This is a difficult and stressful time for many so we are looking at ways that we can use our resources and materials to help combat social isolation and support the historic environment sector.

APPROACH TO 2020-21

Given the uncertainty in the organisation's operating environment, we cannot continue to operate as business-as-usual for the immediate future. This means that we need to rethink our plans for the next year to reflect the situation in Scotland and the financial resources available to us.

Our focus for the initial part of 2020-21 is to make sure that our essential functions can be funded and staffed appropriately.

To address the uncertainty around the length and impact of this outbreak and the restrictions currently in place, our planning for 2020-21 will follow three phases:

1. Immediate priorities to maintain the operation of the organisation and maximise staff resources for the next six months

2. Resumption planning to ensure that the organisation can resume core activities as soon as appropriate once restrictions are lifted

3. Long-term planning to ensure we can reduce the impact of this period on the organisation and do as much as we can to help mitigate the impacts on wider society.

SIX MONTH PLAN

For the first six months of 2020-21 we will focus on continuing to deliver essential functions, reallocating staffing and resources as needed to ensure these continue to operate despite the challenging times. Given the circumstances, there are activities where we will not be able to continue to provide normal service. We are working to minimise the impact of this situation on our core activities as well as ensure we can resume these activities when appropriate.

Where additional staffing resources are available, we will invest time in areas that develop our thinking and activities to provide leadership in these areas and support to the sector during this difficult time.

In developing this Action Plan for 2020-21, we have retained the structure of the Corporate Plan, identifying actions in relation to each of our five outcomes and key performance indicators (KPIs).

Under each of our outcomes, we have outlined the impact of this crisis on the outcome and identified actions covering what we are doing to support the historic environment sector in **response to COVID-19** and how we will **maintain and develop our core activities.** Some of these actions are short-term, while others will continue beyond the initial six-month period we have focused our initial planning on.

We will keep these actions under continual review to respond to changes in our staffing and in the external environment at this time, including ensuring we are in a good state of readiness for resuming the remainder of our core activities when appropriate.

1. THE HISTORIC ENVIRONMENT MAKES A REAL DIFFERENCE TO PEOPLE'S LIVES

Heritage delivers engagement and wellbeing benefits through visits, education programmes, volunteering and just by existing. Even without physically visiting heritage sites, the historic environment can still make a difference to people's lives in many ways. Over the next six months, we will improve and promote our online resources and social media, continue to support communities to protect and value their heritage, and increase understanding and awareness of the wellbeing benefits of the historic environment.

KPI 1: Increase wellbeing from Scotland's historic environment

Responding to COVID-19
- Publish information showing the wellbeing/health benefits of heritage, including demonstrating areas where the historic environment is (and can) contribute during the COVID-19 restrictions

- Support emergency services and NHS where feasible via Scottish Government COVID-19 response team

Continuing and developing our core activities
- Further develop our volunteering programme

KPI 2: Increase engagement with Scotland's historic environment

Responding to COVID-19
- Implement a strategic communications content plan which uses our social media presence and our online resources to promote heritage to new and existing audiences, followers and members

- Support learning at home by developing new online content across the organisation to supplement our existing online resources and making all our paid for digital services and products on SCRAN free until the end of July 2020

Continuing and developing our core activities
- Work with Young Scot and the external Youth Forum using digital platforms to engage and involve young people in the historic environment

- Continue to develop the Heritage Hub, a single digital service for all to access Scotland's national record of the historic environment

KPI 3: Enhance communities' use of their heritage in placemaking

Responding to COVID-19
- Develop and begin implementation of an action plan for how we can support heritage-related community groups affected by this crisis

Continuing and developing our core activities
- Review and contribute to Scottish Natural Heritage's Landscape Character Assessment to ensure that the historic environment is adequately recognised and understood

- Review and update our technical publications to support building owners and community groups across Scotland in a period where normal systems may be ineffective and assets at increased risk

2. THE HISTORIC ENVIRONMENT IS LOOKED AFTER, PROTECTED AND MANAGED FOR THE GENERATIONS TO COME

Regardless of any restrictions on access to the sites in our care, we still need to ensure that they are looked after against the elements and that they don't pose a risk to those in surrounding areas. We can also use this time to support others to gain the knowledge and skills they need to look after the historic environment through continuing to improve the information we publish and increasing our understanding of existing information on the historic environment. A key focus for this will be on our response to climate change, working internally and with partners to better understand the actions we can take now and into the future to adapt our activities and sites to be more resilient to climate change.

KPI 4: Strengthen the resilience of Scotland's historic environment

Responding to COVID-19
- Establish and undertake emergency protocols/inspections to ensure the safety and security of our estate, collections and archives and develop a plan for the staged re-opening of the sites in our care for staff and the public

- Work with partners on the continued development of a built heritage investment plan, focusing on reviewing opportunities and delivery models in light of COVID-19

- Respond to the impact of the current situation on the longer-term management of and investment in the Properties in Care of Scottish Ministers and associated Collections by refreshing our existing Asset Management Plan, Investment Plan and the systems within this, including resource prioritisation and management regimes

Continuing and developing our core activities
- Continue to administer our designations, advice and statutory consultation functions and scheduled monument consenting regime efficiently and transparently

- Improve and catalogue the digital data we hold in our national record, on the sites in our care and our digital archive

- Develop a business case for a solution to the storage of the archives and collections in our care

- Review the presentation of the Statements of Significance on the properties in our care and update a further 7 statements

- Work with Museums Galleries Scotland to agree a revised schedule for new full applications and return submissions for site-specific museum accreditation

- Provide advice during the development of Scotland's National Planning Framework IV and its incorporation of Scottish Planning Policy, as required by Scottish Government Planning and Key Agencies

- Work with key agencies and other partners to support the development of environmental and other internationally recognised assessment methodologies for application in Scotland

- Review our nature conservation survey programme, including how we can involve volunteers/public

KPI 5: Increasingly lead the sector in climate change action

Responding to COVID-19
- Focus on maximising carbon savings during any closure period and considering how we can learn lessons for the future in how we work

- Work with partners to convert the Adapt Northern Heritage Conference 2020 to an online event

Continuing and developing our core activities
- Deliver a revised version of Year 1 of our *Climate Action Plan 2020-25*, including exploring sustainable adaptation opportunities at the properties in our care and completing a high-level assessment of climate change-related risks for the organisation

3. THE HISTORIC ENVIRONMENT MAKES A BROADER CONTRIBUTION TO THE ECONOMY OF SCOTLAND AND ITS PEOPLE

As an attraction for international tourism, the historic environment provides a big contribution to Scotland's economy. Like most sectors of the economy, the tourism income generated by the historic environment and the economic contribution from the historic environment supply chain will likely be affected by the restrictions imposed as a result of COVID-19. Over the next six months we will continue to provide support to communities in receipt of one of our grants, promote key sector skills and ensure we have a strong visitor offer in place targeting key audiences during the recovery period.

KPI 6: Increase economic benefits from Scotland's historic environment

Responding to COVID-19
- Operate a prioritised grants programme, adapting our provision as appropriate to continue to support the historic environment sector in the current situation within available resources

- Enhance our level of response to members and customers, such as trade accounts, while our sites are closed

- Develop our marketing and engagement plans in preparation for the lifting of travel restrictions and into 2021, with a focus on priority offers for members and trade customers, incorporating the Year of Coasts and Water and adapting our marketing to attract a domestic 'staycation' market

- Consider the current and longer-term impact of COVID-19 on the *Historic Environment Skills Investment Plan* and work with external partners to help shape any response or shifting perspective required

- Influence strategic investment in places where the historic environment can make a significant contribution to economy recovery after the COVID-19 crisis through our work with place partnerships, economic development agencies, Community Planning Partnerships and Growth Deals

Continuing and developing our core activities
- Deliver a revised version of Year 2 of our *Research Strategy* for 2019-22, including supporting PhD studentships and scoping future research funding and collaboration opportunities

- Support existing Modern Apprenticeships and Studentships, adapting delivery to fit current circumstances as required

- Continue to develop training programmes, qualifications and online technical education resources

4. THE HISTORIC ENVIRONMENT INSPIRES A CREATIVE AND VIBRANT SCOTLAND

The historic environment is about more than buildings and artefacts, and while restrictions on movement are in place it is important that we continue to champion intangible cultural heritage and the stories of our history. We will use technology and digital means to continue to promote creative and educational activities that can be accessed online instead of in person. At this time of crisis, international cooperation is essential and we will continue to build our relationships with international partners and initiatives.

KPI 7: Increasingly inspire creativity and innovation

Responding to COVID-19
- Work with our partners to develop and deliver new content for the XpO North Heritage programme, which is now being delivered digitally and anticipating higher take-up

- Deliver our legal obligations in the *Gaelic Language Plan 2018-23* by focusing on non-contact and the educational offer for home learning

Continuing and developing our core activities
- Develop our learning framework, including a new creative learning approach across our digital resources and programmes to launch in 2022 – Year of Scotland's Stories

- Explore how we implement our intangible cultural heritage policy statement, mainstreaming intangible cultural heritage across our organisation

KPI 8: Increase international recognition of the quality of Scotland's historic environment

Responding to COVID-19
- Develop new ways to work with and engage international partners in collaboration with key Scottish and UK agencies

- Work with UNESCO, World Heritage UK National Commission and UK historic environment bodies on a plan to utilise World Heritage Sites to support the global recovery, building on the updated UNESCO UK National Commission report on the wider value of UNESCO to the UK

Continuing and developing our core activities
- Deliver a revised International Strategy annual plan and continue to monitor and respond to Brexit and its impact

- Look at options for international benchmarking of our tourism sites including considerations of the long-term impacts of the current situation

- Create a new delivery plan for the Archaeology Strategy

5. THE HISTORIC ENVIRONMENT IS CARED FOR AND CHAMPIONED BY A HIGH-PERFORMING ORGANISATION

While many of our activities are disrupted, we can use this time of restrictions and flux to focus on ensuring we remain well set up to lead the historic environment sector through this and future challenges. We will make sure we can continue our role as a lead public body and work to build the resilience of our people, our finances and our partnerships during this time.

KPI 9: Grow trust and confidence in Historic Environment Scotland

Responding to COVID-19
- Show leadership through focused research and intelligence gathering, including a survey of sector organisations' responses to COVID-19, to inform our strategic planning and ensure we are representing the sector's interests in policy committees and the *Our Place in Time* Working Groups

- Review a number of our strategies, policies and procedures, including the visitor and digital strategies, to ensure they remain fit-for-purpose in response to this situation

Continuing and developing our core activities
- Deliver mandatory reporting including the 2019-20 Annual Report & Financial Statements, the Public Bodies Climate Change Duties Reporting and Sustainability Reporting, the Properties in Care Annual Report 2019-20 and the Planning Performance Report 2019-20

KPI 10: Enhance the sustainability of Historic Environment Scotland

Responding to COVID-19
- Maintain key corporate services to meet commitments to staff, suppliers and customers and support increased home working and online provision with IT capabilities

- Promote colleague wellbeing, both physical and mental, supporting individuals as we adapt to a new way of working

- Implement an internal communications plan focusing on how we inform and support our staff, considering how we monitor colleague engagement enabling the appropriate actions to be taken

- Develop staff skills and capabilities by providing increased digital learning and volunteering opportunities and facilitating staff re-alignment to ensure that the right resources and skills are targeted to the most critical business needs

- Undertake a contracts review and engage with suppliers to ensure our position is protected appropriately during the COVID-19 outbreak

- Continue to build on staff awareness and our response to increased cyber-crime at this time and develop options to raise our threat management and monitoring capability

Continuing and developing our core activities

- Launch our new *People Strategy 2020-25*, and implement our year 1 action plan

- Deliver 'Programme for Success' priorities for 2020-21 including continuing to develop our new corporate management information system, an electronic document record management system, intranet and a properties in care asset management system

- Develop commercial and fundraising strategies to explore opportunities to increase our financial resilience by diversifying income sources

RESUMPTION PLANNING

As well as adapting our activities in the short-term, we also need to keep our eye to the long-term to ensure that we can resume core activities as quickly as appropriate once restrictions are lifted and manage any long-term implications from the economic shutdown.

With continued uncertainty about how long the restrictions on movement may last for, we are undertaking resumption planning to consider how best to resume operations at our sites. We are also analysing the potential long-term impact on the organisation and the historic environment sector of an economic recession as a result of this outbreak and will adjust our financial strategy and operations appropriately.

We will continue to monitor the situation and revise and publish an updated Action Plan throughout the year to respond to the changing circumstances.

MEASURING PERFORMANCE

This year is unlike any other, with unprecedented restrictions on movement put in place impacting on everyone's ability to continue business-as-usual. We are unable to measure our success in the same way that we normally would. However, by putting in place solid plans now we can still ensure we contribute towards the achievement of our outcomes and the wellbeing of Scotland.

In addition to continuing to measure our progress with the key performance indicators (KPIs) in our Corporate Plan, we will know that we have done this successfully if:

- We are able to support our staff to stay safe and healthy at this time.

- We are able to maintain a viable financial position.

- We are able to continue operating our essential functions and resume the core activities we have had to pause in the most appropriate way to support wellbeing.

- We are able to support the historic environment and wider public sector through this time.

- We are able to provide online resources to people affected by the restrictions on movement.

- We are able to progress work on some key policy areas critical to our sector.

RESOURCES

The closure of our sites for an unknown period has had an impact on the financial resources available to the organisation. We are continuing to work with the Scottish Government and other partners to ensure that we can meet our financial commitments.

The bulk of the work contained in our six-month Action Plan will be undertaken using only staffing resources. Where they have the technology needed, our staff are working from home. However, we recognise that the need to care for family members as schools are shut and increasing numbers of people are self-isolating will impact on the productivity of our people.

Our people are our most important resource and we will continue to support our staff to manage their workload in these difficult times.

RISK MANAGEMENT

Our response to the COVID-19 crisis has been supported by strong risk management practices across the organisation. We maintain a corporate risk register to support the delivery of our strategic priorities and this is being refreshed and kept under regular review in light of the COVID-19 situation.

Historic Environment Scotland is the lead public body established to investigate, care for and promote Scotland's historic environment.

We are committed to ensuring this publication is accessible to everyone. If you need it supplied in a different format or language, please get in touch.

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