

PROPERTIES IN THE CARE
OF SCOTTISH MINISTERS
ANNUAL REPORT 2018-19



HISTORIC
ENVIRONMENT
SCOTLAND

ÀRAINNEACHD
EACHDRAIDHEIL
ALBA



Principal author: Dr Clare Torney,
Head of Analytics, Reporting and Audit
Analytics support: Gary Carvel,
Analytics and Reporting Officer

Please note, this report does not detail activity/
investment at our ancillary properties, unless this
activity has a direct impact on the properties in
care and/or associated collections.

Front cover: Urquhart Castle.



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I. INTRODUCTION

Historic Environment Scotland is the lead public body caring for Scotland's historic environment. Fundamental to our role in improving understanding of, and public access to, this environment is the management and conservation of the 336 'Properties in Care' (PiCs) for which we have been delegated authority from Scottish Ministers under The Scheme of Delegation (made under Section 3 of the Historic Environment Scotland Act 2014). This report sets out some of the activity we have undertaken at the properties in 2018-19 to deliver these functions delegated to us.

2018-19 marked the final year in the delivery of HES's first Corporate Plan, which laid out our goals to help things happen and make things happen through collaboration, conversation, openness, accessibility and innovation; these approaches have been fundamental in shaping the way we care for our sites. The end of 2018-19 marks the first full financial year of delivery of our Asset Management Plan, which sees a significant shift in the way we manage our historic assets, and also saw the completion of the first full calendar year of our Peer Review Panel.

The dynamic environment in which our monuments sit, combined with the often difficult economic circumstances in which we operate makes the task of caring for the Properties in Care a challenging one. This annual report reflects back on what we have delivered at the Properties in Care this year and demonstrates the progress made against the five strategic themes outlined in our 2016-19 Corporate Plan: Lead, Understand, Protect, Value and Perform. These themes underpin all of our work and are intended as practical section headings, not firm boundaries.

We have taken the lead in relation to developing our understanding of climate change and sustainability in the historic built environment and are acting upon this knowledge to better care for our properties. Our work on climate change and sustainability is at the core of what we do; alongside cultural significance, authenticity, skills and materials, this forms the basis of our Conservation Principles.

We invested a total of £38 million (direct and support) in the Properties in Care in 2018-19, and activity at our sites made a contribution to Scotland's economy of an estimated £620 million.

A record 5.2 million people visited one of our staffed sites this year and our PiC-based volunteer numbers continue to increase, making a vital contribution of over 7,000 worked hours in 2018-19.

Our focus on the Year of Young People had a notable impact on visitor numbers and volunteering hours. Over 8,000 young people benefitted from reduced price entry at our sites, just one of several incentives employed to increase accessibility to cultural heritage for the younger generations.



Edinburgh Castle.

2. LEAD

We support and empower others by adopting a leading and enabling role in the historic environment sector; together we secure the future of our historic environment. Evidence of our leading role in making our cultural heritage accessible to all is threaded throughout this report.

We work with partners and communities across the country to widen access to the Properties in Care. We embrace innovation in our work to broaden our understanding of Scotland's historic assets and the challenges we collectively, as stewards, face in caring for them.

2.1 CLIMATE CHANGE AND SUSTAINABILITY

Following the publication of our *Climate Change Risk Assessment of the Properties in Care* in 2017-18, this year we made significant progress in disseminating the results of this work as well as in our approaches to sustainability.

This year we worked on 29 projects that will deliver energy efficiency and/or climate change adaptation benefits in the longer-term; six of these are multi-site projects delivered on a regional

or national scale. These projects include work like upgrades to more energy efficient heating and lighting systems, and building fabric adaptation measures.

Through our on-going work to reduce our carbon footprint, this year we reduced operational greenhouse gas emissions for the organisation by 13.1%. In relation to the PiCs, energy consumption fell by 1.5% relative to last year, equating to a 12.3% drop in emissions.

Our 2018-19 climate change and sustainability deliverables and achievements include:

- receiving the WWF Earth Hour Public Body Champion Scotland Award 2018 for our work on climate change in the historic environment and our support of Earth Hour; 12 HES properties switched off their lights for Earth Hour on 30th March 2019
- featuring on television, in Countryfile Autumn Diaries (BBC One) and Sean Batty's The Weather Show (STV) and taking part in filming for the new series of Scotland from the Sky, discussing coastal erosion at Fort George (BBC One)
- completing the first phase of a project to upgrade the floodlighting at Stirling Castle to maximise energy efficiency and contribute to energy and carbon emissions reduction targets
- being presented with the Fit for the Future Changemaker Award in recognition of our pioneering climate change risk assessment work
- supporting sustainable staff travel by improving facilities at our headquarters buildings, with support from Cycling Scotland and SESTrans
- continuing to disseminate the results of our research on climate change mitigation and adaptation in traditional buildings through the Refurbishment Case Studies series.

2.2 INNOVATION IN CONSERVATION

Our digital innovation projects continue to be at the forefront of our conservation work. We continue to monitor the condition of the PiCs using the HES■SIGMA condition survey tool and we are working towards the development of PiCAMS, our bespoke Properties in Care Asset Management System.

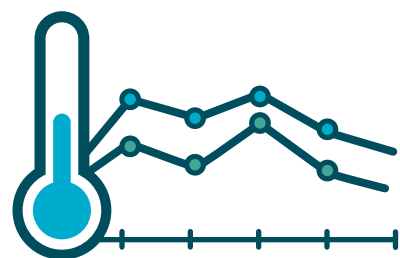
We have continued work on the Rae project, digitally documenting the Properties in Care and associated collections. Notable sites that have been documented this year include Jarlshof, Mousa Broch and Linlithgow Palace, and we have continued our work to digitally document Edinburgh Castle. We have also commissioned terrestrial laser scan survey and aerial photography at Jedburgh Abbey, Kelso Abbey, St Andrews Cathedral and Aberdour Castle.

We have been making this information accessible through the Historic Environment Scotland SketchFab account, where 3D models of collections objects and properties can be accessed free of charge; we now have over two hundred models available through this medium. This work now provides virtual access to the Maiden Stone so visitors can digitally view and interact with the stone while it is covered during winter months for protection.

In 2017-18 we reported on our work with Replicade Ltd. via a CivTech® project to develop a new affordable visitor counter which could be deployed across the unstaffed PiCs, with an automatic data transmission sending remote visitor data back to a central database for reporting with minimal or no staff requirement. We continued this work in 2018-19, however, the project has thrown up a host of technical challenges which need to be overcome before installation of such counters is possible.

In October 2018, we hosted DigiFest, a two-week festival celebrating the latest digital innovations in the heritage sector. This event aimed at families, schools, young people and professionals gave visitors the chance to explore the latest technologies in 3D modelling and printing, augmented and virtual reality, gaming, animation, robotics and coding. The DigiDoc conference attracted in the region of 150 participants per day over 3 days, additionally there were over 1,500 participants at outreach workshops, and over 300 school pupils at education sessions delivered over the two-week festival.

Our digital work spans across several of our strategic themes; more details of this work features throughout this report.



THIS YEAR WE REDUCED OPERATIONAL GREENHOUSE GAS EMISSIONS FOR THE ORGANISATION BY

13.1%

2.3 A FUTURE FOR TRADITIONAL SKILLS

During 2018-19 we have been working closely with Skills Development Scotland (SDS) to contribute to the first *Skills Investment Plan* (SIP) for Scotland's historic environment sector. This plan, which is an outcome for the 'Our Place in Time' skills group, was launched in March 2019. The Action Plan within the SIP builds upon and expands the remit of the Scottish Government Traditional Skills Strategy. The SIP contains 3 priority themes:

1. Engaging the sector in skills & innovation
 2. Attracting future talent & improving access
 3. Workforce development
- Working closely with SDS and our educational and industrial partners, we have ensured that our existing and planned skills initiatives are aligned with these themes.

We engage the sector in skills and innovation through a varied programme of learning opportunities, many of which take place at the Engine Shed. This year we welcomed 1,933 participants to our programmed and professional networking events at the Engine Shed, and in the 2018-19 academic year we provided 1,018 learning hours (excludes HES staff participants) via our Advanced Professional Diploma in Technical Building Conservation.

We have collaborative partnerships in place to maximise the reach of our work, such as our work with Highlands and Islands Enterprise (HIE). This three-year joint project to identify traditional skills and materials projects in Argyll commenced this year. As part of this work, we have developed relationships with Mount Stuart Trust, Dunollie Castle and the

Rockfield Centre, as well as Argyll College to investigate how we can use traditional building projects to introduce construction craft and careers to local secondary school children.

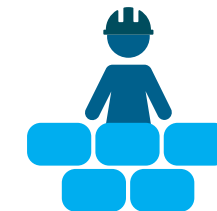
We have made significant progress in the area of traditional skills and materials qualifications development this year. We have now developed 14 Heritage Skills SCQF Level 6 Occupational Pathways, eight of these pathways will be new formal VQ's and the remaining six will complement existing craft occupations. Additionally, we piloted a National 4 Craft/Technician Award with a High School in Stirling, and are now working with Forth Valley College as an industry partner to implement a second phase (revised) pilot with more schools.



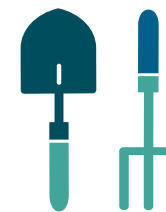
11 Internships



9 Traditional Skills Craft Fellows



40 Apprentice Stonemasons
17 HES + 23 private sector



4 Apprentice Gardeners



1 Apprentice Painter



9 Tourism Apprentices

Figure 1 – Supporting skills development in the sector.

In 2018-19 we supported nine craft fellowships, 11 paid internships and 22 trade focussed modern apprenticeships, with an additional 23 private stonemasonry modern apprentices being trained by HES at our Elgin and Forth Valley College (Stirling) training facilities (Figure 1). Additionally, we have hosted one Black and Minority Ethnic (BME) trainee through the Next Step Initiative funded by Heritage Lottery Fund, and we have supported four of our own Monument Conservation Unit staff to undertake the

SVQ2 Estate Maintenance qualification, so we are better placed to meet the needs of our estate. Our dedication to developing our own workforce is illustrated in Section 6.2.

2.4 INCREASING OPPORTUNITY IN THE TOURISM INDUSTRY

This year, three HES cultural venues modern apprentices graduated from their programme; two of these former apprentices have gained

permanent employment within HES. A second intake of nine young people were recruited to start the programme at Edinburgh Castle, and one at Fort George. In addition to their daily on-site work and coursework, the apprentices attended the Scottish Modern Apprentice Convention hosted by Skills Development Scotland, and engaged in the HES Investors in Young People bid.



THE ENGINE SHED WELCOMED
1,933 PARTICIPANTS
TO PROFESSIONAL EVENTS
DURING 2018-19

3. UNDERSTAND

We continue to deliver our technical, historical and archaeological research to underpin the work we do to protect the Properties in Care, and to ensure that others have the knowledge and understanding to care for the wider historic environment in Scotland.

As we continue to learn about the Properties in Care, we share our knowledge with others through our freely available *Statements of Significance*.

3.1 ASSET SCHEDULE

There were no acquisitions or releases of PiCs in 2018-19. There were several changes to designations as part of the review of dual designation status across the HES estate. Fourteen PiCs have been impacted by these changes: 13 having listings removed and maintaining scheduled monument status; one PiC having scheduling removed and re-designated as listed. In addition to this, four PiCs have had scheduled or listed areas amended. These changes are summarised in Appendix A.

In April 2018 we published our policy and guidance on asset transfer under the Community Empowerment (Scotland) Act 2015, which outlines our

commitment to facilitating asset transfer requests where they benefit communities and secure positive outcomes for the historic environment. The publication of this policy and guidance strengthens our commitment to empower communities across Scotland through support and collaboration. The transfer of assets to communities has a valuable role to play in the stewardship of Scotland's historic environment and offers an important opportunity to support regeneration and help deliver lasting benefits to local communities throughout the country. The *Asset Transfer Policy and Guidance* is available to view on our website.

In May 2014, Scottish Ministers asked the Keeper of the Registers of Scotland to complete the Land Register by 2024, and to register all public land by 2019. We are making very good progress on this project with 86% of the PiCs owned by Scottish Ministers, already registered in the land register or with the Keeper of the Registers of Scotland, for registering. We are now starting to progress HES-owned sites and ancillary buildings and are on course to meet the October 2019 deadline.

In relation to unusual events at the PiCs, there were a number of instances of vandalism, anti-social behaviour and attempted theft within the PiC areas. This included the spraying of graffiti at Arbroath Abbey, and incised graffiti at Machrie Moor and Dunfermline Abbey. A new partnership, the Scottish Heritage Crime Group, launched in April 2019, will tackle heritage crime in Scotland. The group brings together representatives from Historic Environment Scotland, Police Scotland, Treasure Trove, City of Edinburgh Council and the Association of Planning Enforcement Officers to work collaboratively to reduce the damage, impact and cost of heritage crime throughout Scotland by raising awareness of the impacts of criminal damage and strengthening information-sharing between partners.

3.2 STATEMENTS OF SIGNIFICANCE

The *Scheme of Delegation* for the PiCs requires that each monument has a *Statement of Significance*. These statements articulate the wider range of values each site possesses. Over the course of 2018-19, 31 Statements were fully revised, meeting the Annual Operating Plan KPI of '30 Statements revised during the year'.

The currency of the statements will naturally go up and down over time (Figure 2). Good practice recommends regular review, ideally on a 10 year cycle.

This year work focussed on Antonine Wall sites, Kilmartin sites and brochs as 'group' projects. All statements are freely available from the *publications section* of the HES website, and are linked on visitor-facing individual site pages for ease of

access by visitors. This year there were over 13,500 downloads. Doune Castle, Linlithgow Palace and Calanais Standing Stones were the most downloaded individual statements.

In addition, we have been working on the delivery of Statements of Natural Heritage. These are applicable to 324 of the PiCs; surveys have now been completed for 300 sites.

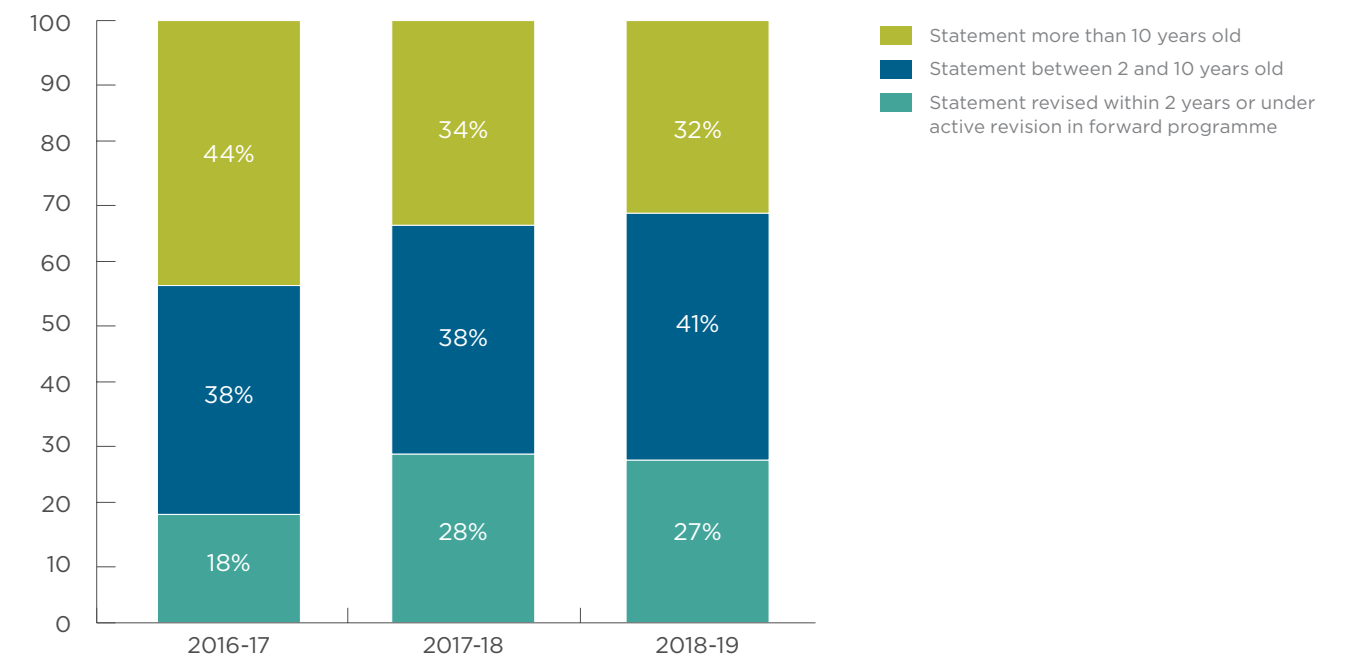


Figure 2 - Currency of the *Statements of Significance*.

3.3 TECHNICAL, HISTORICAL AND ARCHAEOLOGICAL RESEARCH

In 2018-19 we progressed 31 technical research projects via commissioned research, postgraduate placements, research partnerships and in-house research. We worked with 35 partners in conducting this work; including several universities, trades federations, private contractors and international heritage bodies. We have continued to focus our efforts in key areas such as climate change adaptation,

traditional materials study, energy efficiency and digital and scientific innovation. Our on-going research helps shape our approach to delivering conservation work at our properties.

We delivered over 50 archaeological and historical research projects relating to 32 of the PiCs. This included the commissioning of archaeological surveys, site investigations and monitoring, systematic documentary sources at Arbroath Abbey and St Andrews Cathedral, and specialist analysis including a major archaeological

evaluation at Caerlaverock, two community archaeological projects at Lochmaben Castle and Dundonald Castle, seven geophysical surveys, three woodland surveys and over 21 archaeological watching briefs (Figure 3). Results from this work will inform future conservation, management, and interpretation at the PiCs. Much of this work also supports visitor facing investment projects for future developments at our sites. Additionally, we provided small project grants for seven archaeological projects with university and museum partners.



Figure 3 - 2018-19 archaeological activity at the PiCs



Scientific investigation at Edinburgh Castle using ground penetrating radar.

4. PROTECT

We apply the knowledge gained through our research to inform decision-making in relation to investment in, and protection of, the Properties in Care. We deliver conservation work to ensure that our assets are protected for future generations to enjoy.

We continue to work to our *Asset Management Plan*, prioritising our conservation work based on our understanding of the monuments and their needs, and the opportunities that arise by caring for them. Future development of our Asset Management System will strengthen our ability to deliver in this way.

4.1 MANAGING THE PROPERTIES IN CARE

HES's *Asset Management Plan* (AMP) was launched in February 2018 and continues to be the driver for how we prioritise and deliver our conservation works at the PiCs; the *Asset Management Plan* can be found on our website .

4.1.1 Conservation and maintenance of the Properties in Care

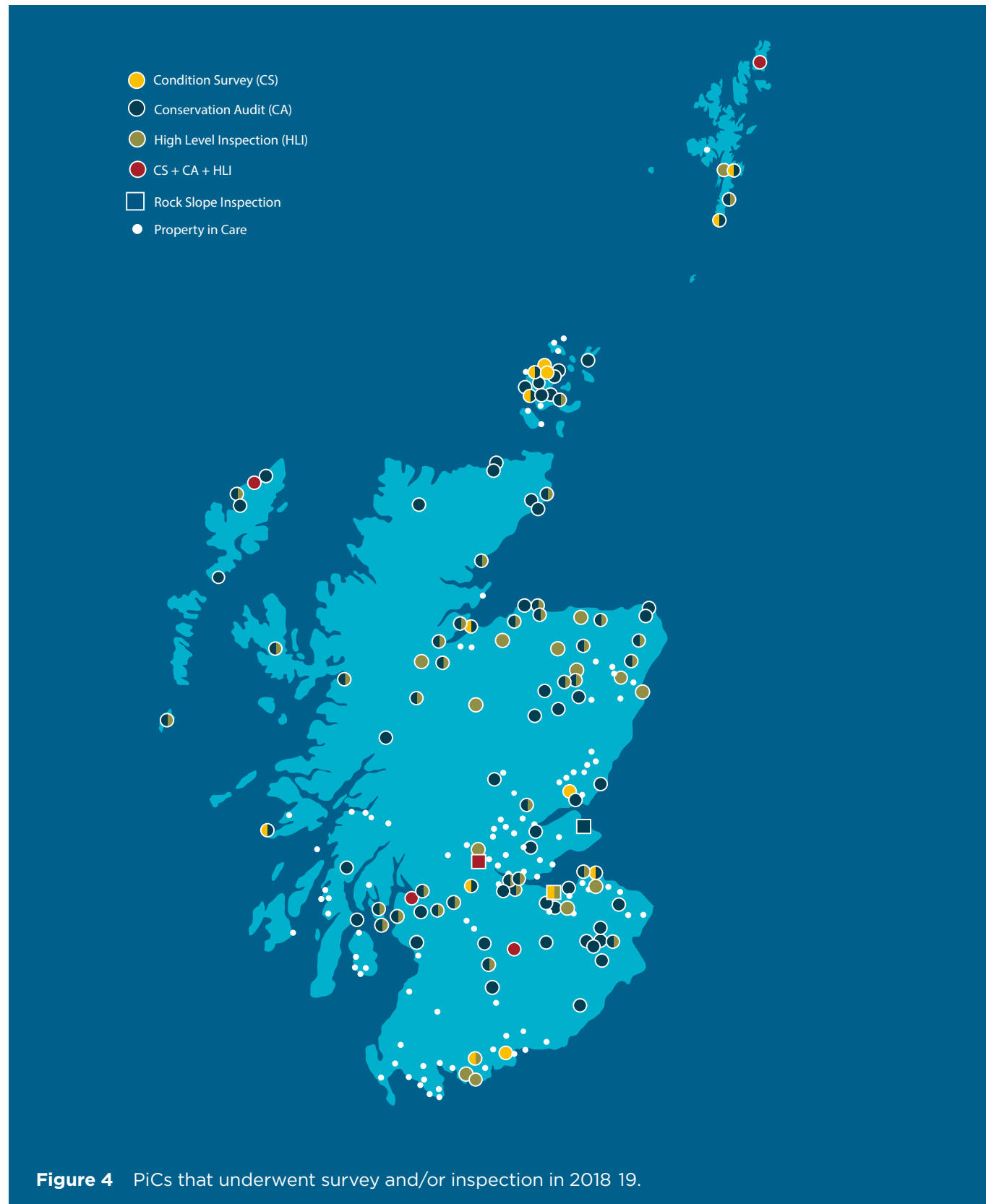
We monitor and record the condition of the PiCs using the HES■SIGMA condition survey tool. Following from last year's development work with our partners, the British Geological Survey (BGS), this year we

have used the HES■SIGMA application to deliver 23 condition surveys at 20 PiCs across the estate (Appendix B). We are working on improving our processes and standards in preparation for delivering the 2019-20 condition survey programme.

We have a hierarchy of surveys and inspections in place to help us understand the condition and needs of the properties. As well as condition surveys, we delivered 132 conservation audits, 66 inspections of high level vulnerable historic building fabric and four rock slope inspections. Figure 4 shows the locations of these surveys and inspections.

Using digital innovation to understand and manage our monuments.





We invested £8.9 million¹ directly on the conservation, maintenance and management of the PiCs in 2018-19 to ensure continued public access to the sites. The delivery of our PiC conservation investment projects against our resource prioritisation hierarchy is shown in Figure 5 and the level of direct investment in conservation, maintenance and management per PiC is illustrated in Figure 6.

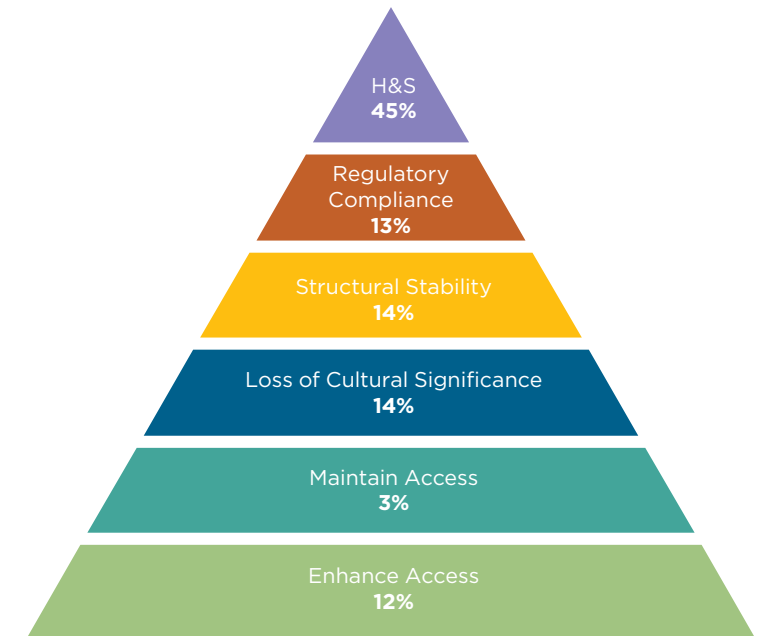
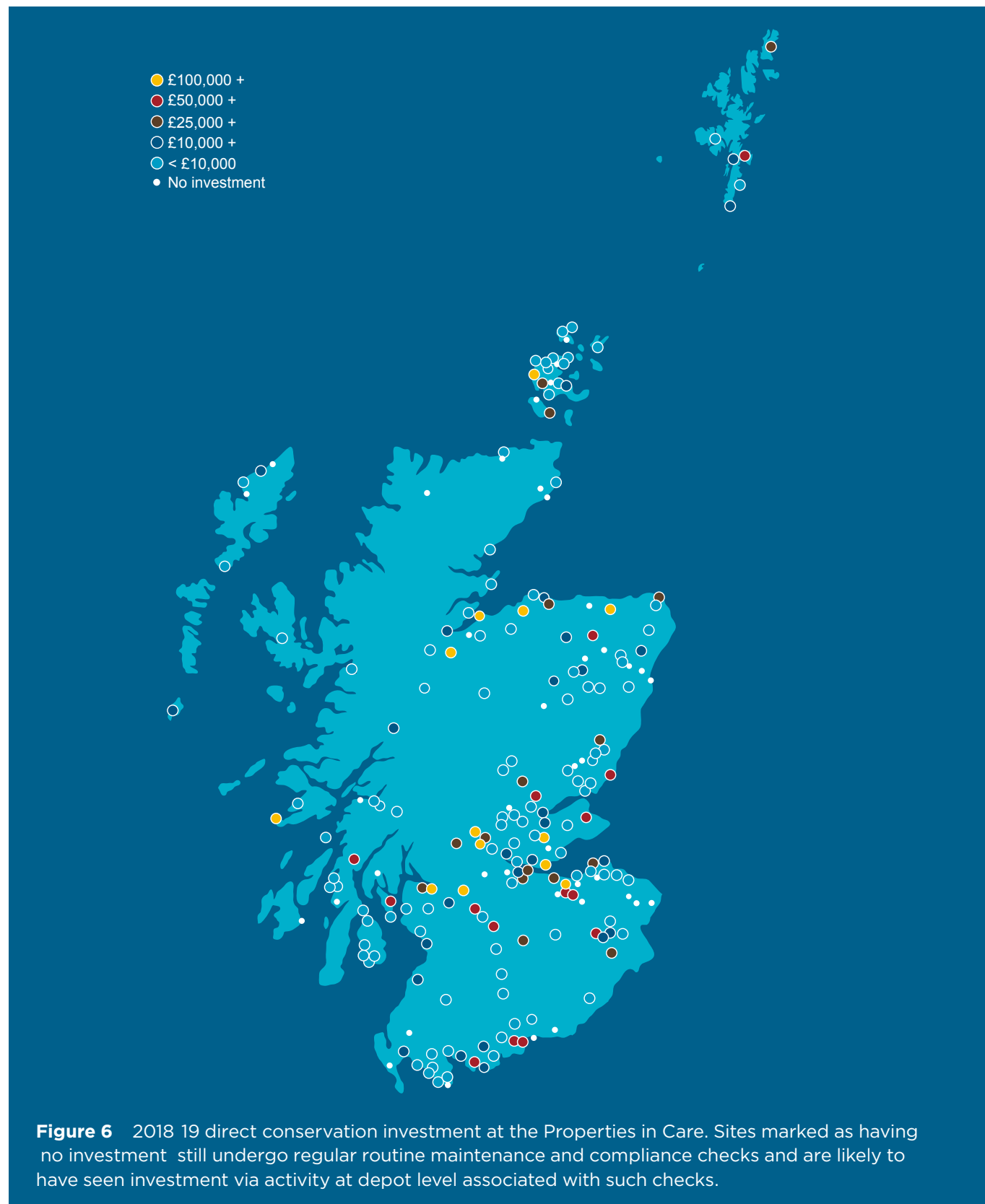


Figure 5 – Proportion of PiC conservation project investment against the *Asset Management Plan* resource prioritisation hierarchy.

NOTE: as projects can contribute to more than one part of the hierarchy, for simplicity, only the highest level in the hierarchy is identified for prioritisation.

¹ This figure relates to investment directly at the PiCs (and any associated visitor centres and depots). It does not include support costs such as staffing or centralised activity.



4.1.2 Conservation and maintenance systems

Properties in Care Asset Management System: this year we achieved several milestones in delivering our Properties in Care Asset Management System (PICAMS), a corporate digital system to support HES in delivering PiC conservation, maintenance and asset management activities.

In early 2018-19, we completed a baselining project which provided a deep understanding of our current workflows, digital systems, information and technology, and we appointed a dedicated Project Manager to drive this work forward.

In December 2018, the HES Board approved a 2-year Agile development project (Phase 1)

for PICAMS. Our development work which starts in April 2019 will be delivered using an in-house development team, with input from experts and stakeholders across the organisation.

PICAMS Phase 1 will deliver a digital system with workflows to support core activities related to conservation, management and operation of the PiCs. By interfacing with other corporate systems PICAMS will bring together a wide range of information, currently held across several systems, to improve our asset management approaches.

This work marks the beginning of a large-scale digital transformation programme, which will shape our digital future and

improve conservation operations at every level. It underpins delivery of our *Asset Management Plan* and therefore our obligations under the Schemes of Delegation.

PICAMS is part of the wider HES 'Programme for Success', which brings together six corporate change projects, all designed to help achieve our goal of being a forward thinking and high performing organisation.

The Rae Project: we have continued our work to digitally document the PiCs and associated collections. This year we commenced documentation of a further 10 sites, meaning that half of all properties are in the process of being documented (if not already complete). We completed documentation of 28 sites and 108 collections items (Figure 7).

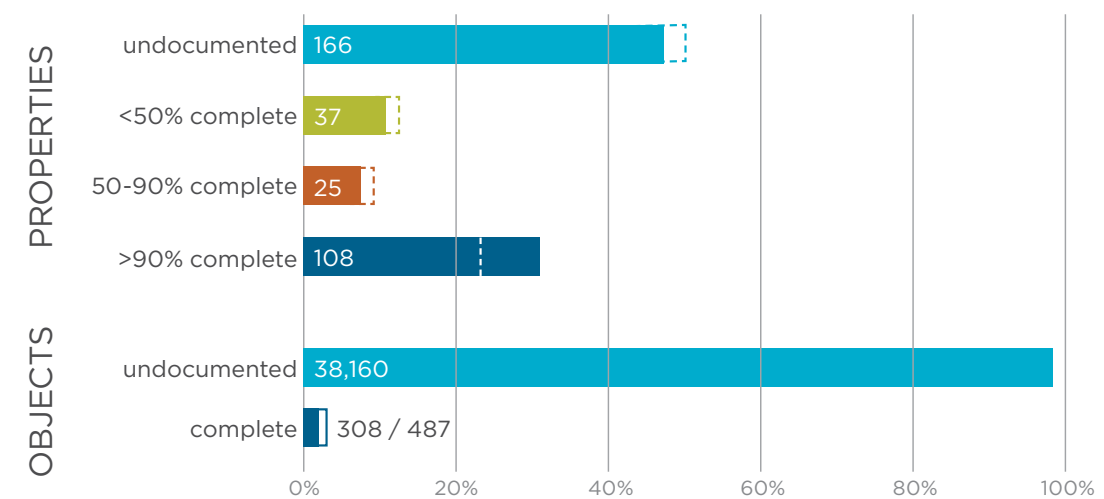


Figure 7 - Progress of the Rae project at end 2018-19. Dashed lines indicate status at the end of 2017-18.

Building Information Modelling (BIM): we continue to explore the opportunities presented by BIM for both project delivery and asset management, and have appointed a full time BIM Manager to lead our BIM implementation project.

Work in 2018-19 has focused on delivering organisational readiness in line with the current British and international BIM standards, primarily by expanding our suite of BIM documents. Building on this, in 2019-20 we will continue to develop our BIM awareness and capability with the aim of:

- assessing all current and future capital construction projects >£2 million using online Scottish Futures Trust (SFT) BIM grading tool, and implement BIM level 1 or 2 as specified
- delivering an organisation-wide BIM communication and training plan
- implementing proportionate asset-specific information security management processes.

We continue to liaise with external stakeholders in promoting BIM best practice in the heritage sector through working groups such as 'BIM 4 Heritage' and 'BIM 4 Curation'. We uphold our status as a lead heritage public body by researching and promoting new technologies to aid in increasing strategic and operational efficiencies.

4.1.3 Standards and assurance

As part of our ongoing Visitor Safety Management Project, Visitor Safety Risk Assessments (VSRAs) are prepared using principles agreed by the Visitor Safety Group. Through this process, risks are quantified and mitigation measures identified with the aim of reducing risk to an acceptable level. In 2018-19 we began preparation of risk assessments at a further 12 sites; at the end of 2018-19 we have 35 risk assessments issued and 23 in preparation. Of the currently outstanding risk assessments, almost 90% relate to category C (low priority) sites.

Our work on statutory compliance at the PICs this year has been focused on setting up a new Water Quality Management Contract and establishing a new LEV (Local Exhaust Ventilation) System contract.



Aerial view of Fort George.



Figure 8 – HES Collections.

4.2 MANAGING AND PROVIDING ACCESS TO OUR COLLECTIONS

Our collection is made up of a diverse range of objects from archaeological settlements, castles, abbeys, historic houses and industrial sites in our care – including many of Scotland’s most culturally significant objects (Figure 8). This large and diverse collection provides a key source of evidence for understanding and appreciating our properties and everyday life and key events in Scotland’s past. This year we acquired 962 objects, which marks a 9% increase in the size of the collection.

Significant progress has been made in the documentation of the associated collections (Figure 9); a total of 3,404 object records were entered on the Vernon Collections Management System. 25,793 objects are now documented to a fully catalogued standard, representing 67% of the collection; this marks a proportionate increase on last year, even in light of the growth of the collection. 27,352 object records were updated in the past year through routine collections management operations such as *Scheme of Delegation* condition checking, collection audits and tracking object movements; we have now condition checked

over 22,000 objects in line with our delegated duties under the *Scheme of Delegation for the associated collections*. In 2018-19 we continued to borrow 6,479 objects on long-term loan from 79 lenders and 130 objects on short-term loan from 10 lenders. We lent out five objects to four borrowers.

We have continued to work on our salvage planning; completing 10 salvage plans this year, bringing the total to 33. This means 63% of plans identified so far as being necessary have been completed. The remaining 19 plans will be completed over the next two years. In

November 2018 we held a salvage training seminar at the Engine Shed and we have begun building a network of contacts across Scotland, providing salvage planning advice to a variety of institutions, both nationally and internationally.

Providing access to our collections includes physical and virtual access. In 2018-19, we have had 48% of our collection on public display; this is an increase of 352 objects compared with last year. Additionally, we now have

1,640 objects on our website to provide the opportunity to learn about, and engage with, the collection more closely.

A further 108 objects have now been digitally scanned and published online as part of the Rae Project. This plays a big role in bringing the collection to those who cannot physically access it; it allows us to provide access to delicate objects that cannot be readily handled or displayed via the use of virtual and augmented reality, and 3D printed objects.

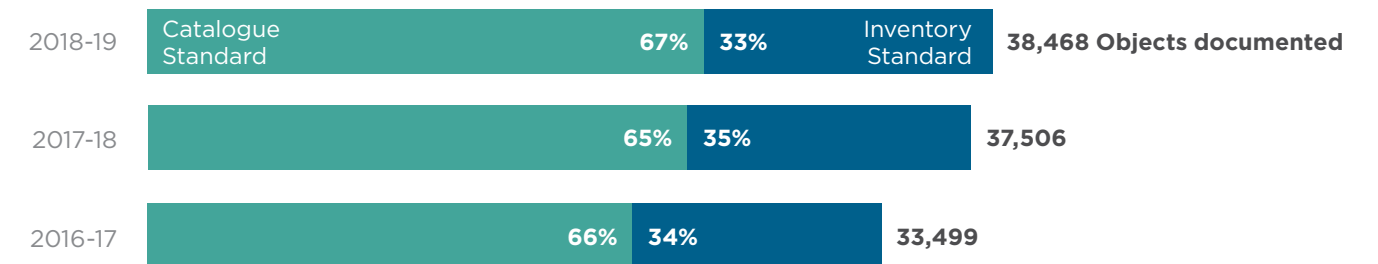


Figure 9 – Progress in documentation of the associated collections.

5. VALUE

We ensure that the historic environment is shared, celebrated and enjoyed by promoting it through education, learning and skill-sharing activities.

We work with a wide variety of stakeholders and communities to ensure that our properties and collections are enjoyed by all by continually working to reduce barriers to access across our sites. 2018 celebrated the 'Year of Young People' and this formed one of several focus areas with respect to providing access.

5.1 PROVIDING ACCESS TO THE PROPERTIES IN CARE AND ASSOCIATED COLLECTIONS

Overall, our sites were open for 98% of their advertised opening time. We maintained our high access level to the PiCs despite HES-wide closures arising due to the severe winter weather in early April 2018; we have now maintained access levels at the PiCs for three consecutive years.

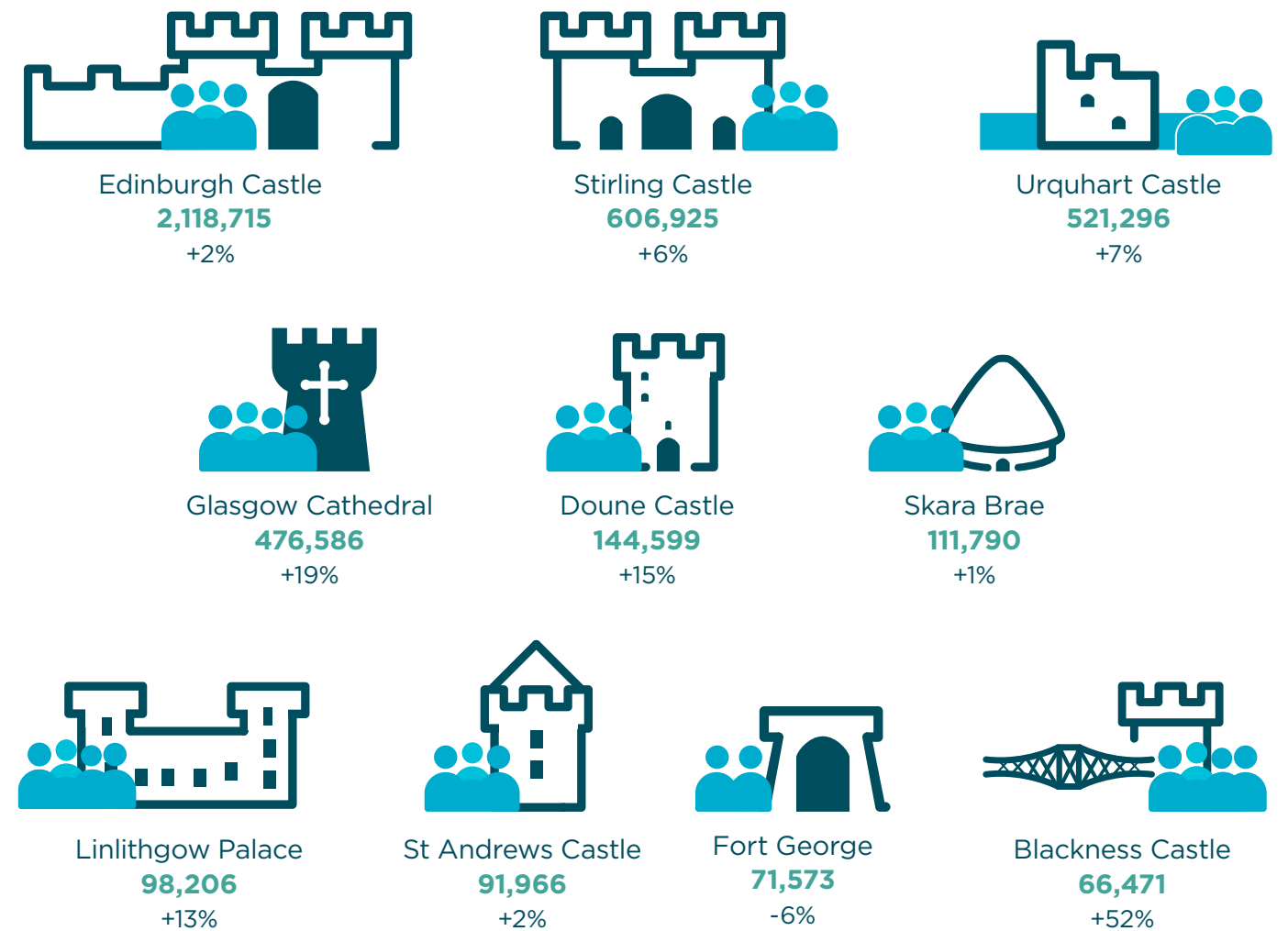
This year we welcomed a record breaking 5.2 million visitors to our staffed sites, an increase of 4% year on year and our sixth successive year of record-breaking growth. We have introduced pre-booking and price differentials at some of our busiest sites to help manage capacity as visitor numbers continue to rise. This facilitates smoother entry flow at sites, creating a more enjoyable experience for visitors.

Our top three sites, Edinburgh Castle, Stirling Castle and Urquhart Castle, all set new records for visitors, with Edinburgh increasing 2%, Stirling up 6% and Urquhart Castle increasing 7% year on year (Figure 10), the latter boosted by an excellent late-night opening return in the peak months.

Doune Castle continued to see excellent returns following its starring role in *Outlander* with visits increasing 15% year on year, while Blackness Castle, the destination for several high-profile films saw visits increase 52% year on year, the largest percentage of any site. Blackness Castle also benefitted from our rolling Lego exhibition which boosted numbers at every site it visited, including Glasgow Cathedral where numbers increased 19% year on year including over 90,000 more visits over the exhibition period.

Some sites did see year on year visitor numbers drop in 2018-19. Caerlaverock Castle suffered from poor weather across the 'Spectacular Jousting' event weekend, and a lower return from the early Easter in 2018. The early Easter also affected Tantallon Castle, where visits fell 9%. Some sites saw a decrease in visitor numbers due to planned closures; Huntly Castle, Argyll's Lodgings and Maclellan's Castle closed to enable essential conservation works to be undertaken, these works ensure that safe access can be provided again in the future.

Figure 10 - Top 10 most visited sites (and % year on year change).



5.2 ENGAGEMENT

This year we provided 128,900 free education visits through our access schemes and our learning and ranger programmes; this presents a 9% increase on 2017-18. We delivered over 50 projects across our programmes with both existing and new partners; this work helps us use our sites in creative ways to support wider learning, wellbeing and skills development needs.

As 2018 was Scotland's 'Year of Young People', we had a number of initiatives in place to increase engagement of young people with heritage, including teaming up with Young Scot to offer cardholders £1 entry to our sites; over 8,000 young visitors benefitted from this price reduction in 2018-19. Additionally, our enhanced engagement offer aligned to the themed year saw us deliver a rich programme for new young people audiences across our sites. These included a 'Knight at the Castle' event at Edinburgh Castle designed for a new young adult audience with a contemporary programme of live music and activities showcasing young Scottish Creative talent, and 'Echoes from Caerlaverock Castle', a partnership project with

Impact Arts where young people from Moffat Academy and Oasis Youth Project in Dumfries created unique performance pieces inspired by visits to the castle and researching stories of its past inhabitants.

We celebrated the success of our long-term commitment to engaging young people at a celebratory event in February 2019. For this we created a special documentary charting a 'year in the life' of our Junior Tour Guides and Junior Rangers. These programmes are currently delivered at nine of our sites.

We continued to provide additional support for access; over 30,000 pupils from 795 Scottish schools benefitted from Heritage Travel Subsidy Grants to support visits to PiCs and World Heritage sites across Scotland. Our Rangers at Holyrood Park continued to provide enhanced access to pupils from Edinburgh's special schools, and we supported visits to and activities at PiCs from groups such as Young Carers, Who Cares Scotland, Autism Lothian, Chernobyl Children's Lifeline, One Parent Families Scotland and the Syrian Refugee Resettlement Programme.

5.3 ENHANCING THE VISITOR EXPERIENCE

At HES, we want to be recognised internationally for providing world-leading visitor experiences, integrated into local destinations – engaging existing and new visitors alike while preserving and protecting our historic environment.

During 2018-19 we made improvements to the visitor experience through upgrades to the interpretive offer at 69 sites and updated the directional and behavioural signage at 71 sites. Two new exhibitions were introduced to Edinburgh Castle, 'Fight for the Castle' in Argyle Tower, and a redisplay and interpretation of portraits relating to Mary Queen of Scots' family line in the ground floor apartments of the Palace. An augmented reality tour has been launched at Caerlaverock Castle and new family-focused interactive activities and games are being trialled at Craigmillar Castle, Blackness Castle and Tantallon Castle.

As well as attracting almost 15,000 visitors to our three major events – 'Rock of Ages' at Dumbarton Castle and 'Spectacular Jousting' at Linlithgow Palace and Caerlaverock Castle – we launched a sell-out evening event at Craigmillar Castle, 'Spotlight

on Mary', telling the story of the Craigmillar Bond conspiracy through a blend of innovative large scale digital projection and living history performances. Our annual events programme delivered 445 days of activity across the PiCs in 2018-19, plus 361 days of living history as part of the permanent offer at Stirling Castle. While new audio guides are in development for Edinburgh Castle and Glasgow Cathedral, nearly 400,000 audio guides and over 194,000 guidebooks were purchased. We now deliver a foreign language offer at 31 of the staffed PiCs and continue to work hard to reduce barriers

to access. We have continued and introduced British Sign Language tours at Edinburgh Castle and Stirling Castle respectively and introduced large format text versions of audio tours in a dyslexia-friendly font at 10 sites.

Throughout 2018-19 we continued to grow and develop new HES volunteering opportunities at the PiCs, increasing the number of volunteer engaging visitor attractions to eleven. Additionally, we engaged volunteers across four summer events and added two new HES volunteer opportunities

to the HES programme. Our PiC-based volunteer numbers continue to increase; at over 7,400 hours in total, the number of volunteer hours dedicated to providing tours, supporting events and helping conserve the landscape of our PiCs has more than doubled relative to last year. We co-designed new cross sector volunteering initiatives through partnership and working group memberships with Police Scotland Youth Volunteers during the 'Year of Young People', the Heritage Volunteer Organisers Scotland network and the *Our Place in Time* Volunteering Group.



Children at Aberdour Castle.

6. PERFORM

We aim to be a high performing organisation that continuously improves the way we work and the quality of service we provide to ensure we can demonstrate delivery of our objectives.

2018-19 marked yet another recording-breaking year for our visitor numbers. This shows our commitment to improving performance and has a marked impact on the local economies and communities of which our sites are a part of.

6.1 THE IMPACT OF OUR INVESTMENT

Including support costs such as staffing and centralised conservation functions, in 2018-19, we invested in the region of £24 million on conservation, maintenance and management of the PiCs and their associated collections. We also invested over £13.5 million on site-specific visitor facing activity such as site presentation, signage, performers, display installation and educational activities, as well as visitor facing staffing. This brings the total invested to ensure the protection and continued public access to the PiCs and associated collections in 2018-19 to £38 million, including £5.9 million of investment plan spend on site condition. This investment has a positive 'knock-on' effect for the wider economy and provides social benefits for communities across Scotland.

6.1.1 Economic impacts

In 2018-19 HES's PiCs generated over £620 million (net) for Scotland's tourism economy. The sites attract visitors to spend in local shops, restaurants, hotels and other leisure services when they would otherwise not have been in the area, or spent less there. This expenditure supported an estimated 16,000+ direct FTE jobs across Scotland.

Our conservation works at the PiCs are vital in sustaining this tourism impact. In keeping our sites open we continue to contribute to the wider Scottish economy, working to avoid the closure of sites and the associated impact this has on tourism in the surrounding area. In 2018-19, we delivered conservation works that allowed us to reopen 19 PiCs that would otherwise have remained closed. These sites generated almost £24 million for their regional economies last year

after reopening, which would otherwise likely have been lost had closures remained in place.

Without our continued conservation work more sites would face closure. Delivery of conservation investment projects this year has helped us avoid otherwise impending closures at 17 PiCs, a number of these being our top visited sites. Through these efforts to maintain access at the PiCs, we have avoided a significant potential loss to Scotland's tourism economy.

In 2018-19, HES spent £20.65 million with suppliers and contractors based in Scotland. Our conservation teams spent £8.28 million of this, which helps support the continuation of traditional skills and materials use in the wider sector.

6.1.2 Social impacts

Thirty-seven per cent of our direct, site-specific, investment associated with conservation and visitor facing activity at the PiCs in 2018-19 was on sites in areas with average to high

levels of deprivation (SIMD ≤5th decile)². Maintaining access to sites in these areas through our conservation work, and maximising value through educational activities and learning opportunities provides valuable intangible opportunities and benefits such as the positive impact on well-being.

² The figure quoted against social impacts in the 2017-18 report related only to direct conservation investment at the PiCs; the comparable figure for 2018-19 is 32%.

 **OVER £620 MILLION**
GENERATED IN 2018-19
FOR SCOTLAND'S
TOURISM ECONOMY



6.2 INVESTING IN OUR PEOPLE

This year we provided 20% more training days to the staff working at, or on, our monuments, bringing the total number of training days provided to 1,157. This training included 520.5 days of health and safety training, 305 days of technical conservation training, and 21 days relating to improving our customer service (Figure 11).

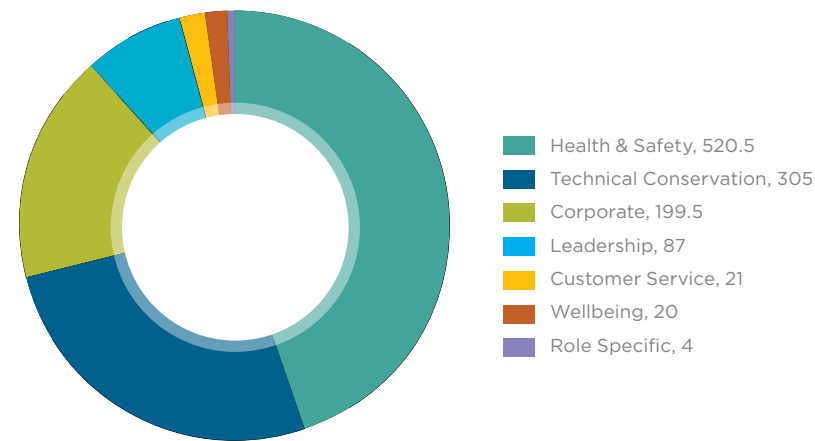


Figure 11 – 2018-19 training provision (days).



6.3 DRIVING OPERATIONAL EFFICIENCY

Over the past year we have made some changes to our processes and practices to improve on operational efficiency:

- to manage the growing visitor demand, all web bookings and the majority of 'Travel Trade' bookings are now administered through a pre-booking system. This helps limit the queuing for tickets and allows us to manage capacity using timeslots to facilitate smoother entry flow at sites. This has proved to be an invaluable tool at our busiest sites and has helped us secure visitor satisfaction, visitor safety, and staff welfare.
- we established a 'New Business' team to take responsibility for the development of new income streams associated with the PiCs. Working closely with other cultural institutions both in the UK and overseas, and with our existing customers, the aim of the team is to explore and develop new commercially focused products and services.

6.4 WORKING WITH OUR PARTNERS

This past year, we have been working with communities to meet local needs and get some of our vacant ancillary properties back into use. Examples of this include our work with Stanley & District Men's Shed, who have taken on the previously vacant East Range and North Lodge at Stanley Mills, and the Trimontium Trust, who are soon to occupy the Abbey House at Melrose Abbey while their own property undergoes refurbishment.

Working with partners in this way allows us to fulfil our commitment to deliver wider benefits and opportunities from our estate, and to actively engage with local communities in the use and management of the properties we look after. Through our work in this

area we provide support for the local economy, increase delivery of educational and social opportunities, and promote health and wellbeing.

We also collaborate with a wide range of partners and communities within destinations. We engage and support membership of a diverse set of initiatives that bring local socio-economic benefits whilst increasing visitor numbers at sites. Destination Orkney, the Malt Whisky Trail, Visit Inverness Loch Ness, Urras nan Tursachan Trading Limited at Calanais Standing Stones, the Iona Community at Iona Abbey, the Fife Pilgrim Way, Midlothian and Borders Tourism Action Group, the John Muir Way and the Whithorn Trust at Whithorn Priory are just a few examples of these collaborations.

6.5 PEER REVIEW

Under the *Scheme of Delegation*, we are required to have a process of peer review in place to ensure that our conservation principles, policies and standards are being upheld. A peer review panel of independent professionals from various fields relating to conservation was established in 2017-18, chaired by a member of the HES board. In 2018-19 the Peer Review Panel completed their first year of reviews. Nine projects were reviewed as part of this process, these included projects relating to conservation of monuments, visitor safety, visitor facing infrastructure and upgrades to mechanical and electrical systems.

Findings from these reviews were positive and highlighted strong adherence to our published principles. The first *annual report*, which covers round 1 and 2 of 2018-19, is available online.

A supplementary report on the period October 2018 – March 2019 is planned to bring annual reporting in line with the financial year; this will be made available on our website.

Museum Accreditation is the peer review mechanism required by Scottish Government (under the *Scheme of Delegation* for the associated collections) for the care and protection of Scottish Minister's historic collections associated with the Properties in Care.

Thirty years on from when the Scheme first started, a new Accreditation Standard was launched on 1st November 2018. A longer 5-year returns cycle (extended from 3 years) will give accredited museums longer to prepare for re-assessment and a greater transparency in the process is being introduced.

The challenge over the past year has been to keep the existing programme of new applications and returns moving forward while preparing for the introduction of the new 2018 Standard. All five 'pending' applications from last year have been successful, and an additional site, Carlaverock Castle, has also achieved accreditation (Table 1). We are currently working towards accreditation of an additional 15 PiC collections.

Table 1 – Museum Accreditation for the associated collections in 2018-19.

SITE	ACCREDITATION STATUS	ACCREDITATION NO.	AWARD DATE
Iona Abbey Museum	Fully Accredited	2375	26-Apr-18
Jedburgh Abbey visitor centre	Fully Accredited	2376	26-Apr-18
Urquhart Castle	Fully Accredited	2382	28-Jun-18
Meikle Museum	Fully Accredited	2381	28-Jun-18
St Vigeans Museum	Fully Accredited	2380	28-Jun-18
Caerlaverock Castle	Fully Accredited	2390	20-Sep-18



**OUR PEER REVIEW
PANEL IDENTIFIED A
STRONG ADHERENCE TO
OUR PUBLISHED PRINCIPLES**



Inspecting the shrine stone at Jedburgh Abbey.

7. CONSERVATION CHALLENGES

The impacts of climate change and increasing visitor numbers continue to present practical challenges at our sites. We continue to work in these areas to help build a better understanding of what the future will bring, and how we can plan ahead to reduce any negative impacts this changing environment will have on the condition of our historic assets and our approaches to caring for them.

7.1 A CHANGING CLIMATE

The beginning of 2018-19 brought a stark reminder of the challenges we face in caring for historic assets in an ever-changing climate. The 'Beast from the East' in spring 2018 presented some tough challenges. Events such as these force us to take stock, and highlight the importance of understanding the changing climate and its impact on our often vulnerable properties.

This past year we have continued our leading research to further understand how the climate impacts our heritage. The findings of our research in this area plays an important role in how we manage our estate, and our expertise in this area allows

us to contribute to national strategy like the Scottish Climate Change Adaptation Programme. We have continued to play a part in a number of collaborative projects including the international 'Learning from Loss project: Transformation in the Historic Environment in the Face of Climate Change', and the second phase of 'Dynamic Coast: National Coastal Change Assessment', the latter which uses Skara Brae as a case study.

We have been looking at ways to incorporate our climate change risk assessment data into our everyday operations. We are starting to use this data to inform our approaches to caring for our historic assets; in a world where the demand of our assets outweighs the available resource, we can use data such as this to develop a risk-based prioritisation approach.

We have been actively disseminating the findings of our *Climate Change Risk Assessment for the PiCs* to maximise the impact of this work in the wider sector. This year we presented our work at several international conferences and events, including:

- International Symposium on Climate Change and Museums: critical approaches to engagement and management, Manchester, April 2018;
- Climate Heritage Mobilization, an official affiliated event of the Global Climate Action Summit, San Francisco, September 2018;
- Fit for the Future Network Harvest, London, October 2018;
- Climate Heritage Workshop, Aarhus, Denmark, 14 March 2019.

In the year ahead we will be revising our *Carbon Management Plan* to align with new Scottish Government targets, and will also publish our new *Climate Change and Environmental Action Plan*. Main themes of the Action Plan will include climate impacts, risk and adaptation; energy & carbon management; sustainable travel; biodiversity; behavioural change; research, education and training; sustainable procurement; and circular economy. These Plans will set out a range of activities, some of which will be focussed around the PiCs. For example, we will be considering additional actions on low emission vehicles and charge points, energy efficiency, sustainable procurement and sustainable tourism.

2019 will also see the gathering of leading climate scientists and heritage professionals from across the globe in Orkney to discuss the application of a new tool for measuring the climate change threat to World Heritage sites; HES will pilot this assessment tool in Orkney. This collaboration, which brings together University of the Highlands and Islands, James Cook University (Australia), Orkney Islands Council, the Union of Concerned Scientists and HES, offers an important opportunity to further enhance our knowledge and pool expertise to face a shared challenge, taking a positive step forward to help protect World Heritage sites across the globe.

7.2 MANAGING THE CONSEQUENCES OF SUCCESS

2018-19 was yet another record-breaking year in relation to visitor numbers, but with this comes an increasing need to manage visitor flow at our busiest sites. Building on the steps taken in 2017-18, further initiatives were introduced at Edinburgh Castle to help manage the increasing demand. A price differential was introduced to make advanced web tickets cheaper than buying tickets on the day; this was an incentive to increase the proportion of visitors booking into specified timeslots ahead

of their visit, providing a greater ability to actively manage visitor numbers during busy periods. At Urquhart Castle, coach bookings with timeslots were managed via our ticketing system to ensure a smoother operation on site, helping to manage the limited parking area amidst the increased trade and cruise demand.

The analysis of our visitor numbers helps us identify trends and anticipate where we might see changes in the future. We can start to use this insight in our long-term planning and factor considerations such as the demands on infrastructure into our Monument Investment Plans.



Stirling Castle.

7.3 ENSURING WE HAVE THE SKILLS AND MATERIALS REQUIRED

The availability of traditional skills and materials is essential in our preparedness for the current and future anticipated challenges at our sites. We have continued to invest in understanding and addressing our resource needs in these areas, working to develop opportunities for expanding our ability in relation to skills and materials across the sector.

We learn with and through other groups and organisations, and by supporting others, we can make a bigger impact in relation to delivering the skills needs of the wider sector. We have supported Third Sector training

organisations like GalGael and The Ridge with mentoring and support for their training initiatives and have supported the Scottish Traditional Buildings Forum in the delivery of craft skills outreach and awareness raising of careers across the construction industry. We have worked through a Strategic Partnership Agreement and Action Plan with Construction Industry Training Board (CITB), Historic England & Cadw to 'mainstream' traditional building issues within the UK construction industry. On an international level, we have undertaken projects with the White House Association and skills exchanges with the US National Park Service.

We have populated and launched the Scottish Natural Stone Database with British Geological Survey (BGS) and we continue to discuss sustainable procurement of Scottish stone with Scottish Enterprise, Scottish Stone Group and Stone Federation GB, as well as various public bodies. We have consulted with stakeholders and are looking at ways in which to help with the supply of materials for production of thatch, and we have discussed establishing a heritage timber project on the national estate with Forestry Commission Scotland (FCS).

In 2018-19 we started a three-year joint project with Highlands and Islands Enterprise (HIE) to explore potential traditional skills and materials projects in Argyll. As a result of our work on traditional skills and materials in Argyll and Bute, we have developed relationships with several stakeholders, together with Argyll College, we are now investigating how we can use traditional building projects to introduce construction craft and careers to local secondary school children.

Through this work we are taking the necessary steps to ensure the future conservation of our historic assets as well as working towards a more sustainable wider construction sector.

As we continue to face these challenges, prioritisation of our resources becomes increasingly important. We will continue to manage our assets and prioritise our resources in line with our *Asset Management Plan*.

We will continue to lead in the delivery of a built heritage investment plan for Scotland through the 'Our Place in Time' Built Heritage Working Group, looking at whether and how there might be a collective and national approach to prioritisation of investment and improved management of the built heritage - bearing in mind that HES is responsible for only a very small fraction of buildings and infrastructure.



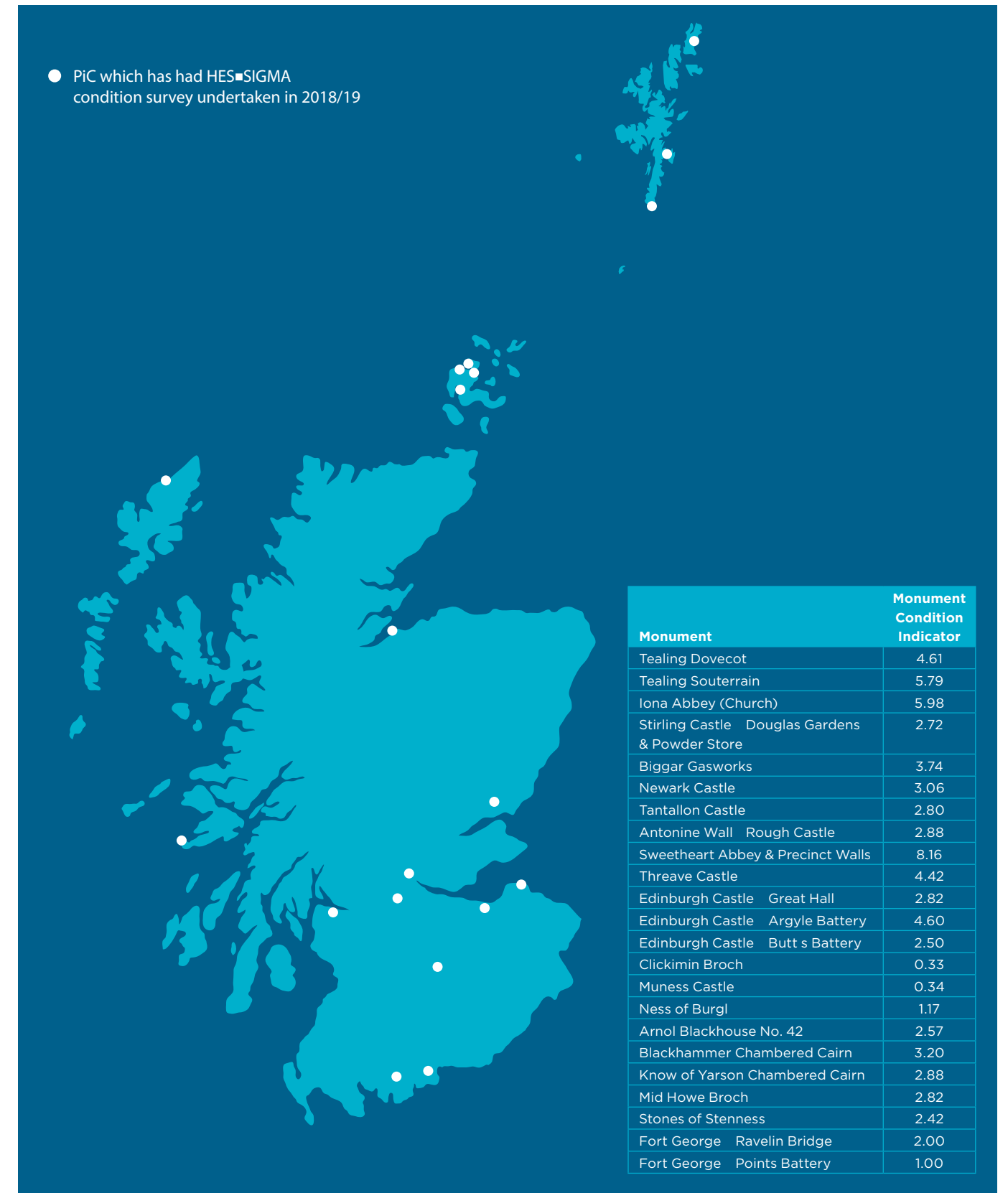
L-R:
Replacement of solar panel at Crichton Castle.
Apprentice gardener working at Blackness Castle.
Apprentice stonemason working at Arbroath Abbey.

APPENDIX A. 2018-19 DESIGNATION CHANGES TO THE PROPERTIES IN CARE

Property in Care	Changes to designation	Current designation	Completion date
Deskford, Church and Sacrament House	De-listed	Scheduled Monument	01/05/2018
Dirlerton Castle, Dovecot and Gardens	De-listed, Amend Scheduled Monument	Scheduled Monument	14/06/2018
Dunblane Cathedral	Amend Scheduled Monument	Scheduled Monument	23/05/2018
Dunkeld Cathedral	De-list Cathedral Gates, Amend Listing for Cathedral	Scheduled Monument	19/04/2018
Bishop s House, Elgin	De-listed	Scheduled Monument	10/04/2018
Elgin Cathedral	De-list Cathedral	Scheduled Monument	10/04/2018
Elgin, Pans Port and Precinct Wall	De-listed	Scheduled Monument	10/04/2018
Fort Charlotte, Shetland	Amend Listing, Amend Scheduled Monument	Scheduled Monument Listed Building	31/05/2018
Foulden Old Tithe Barn	De-list Tithe Barn	Scheduled Monument	04/04/2018
Innerpeffray Collegiate Church/Churchyard & Faichney Monument	De-listed	Scheduled Monument	24/07/2018 13/02/2019
Kirkmadrine Church	Amend Scheduled Monument	Scheduled Monument	31/05/2018
Maybole Collegiate Church	De-list Church	Scheduled Monument	05/04/2018
St Vigean s Museum, Symbol Stones	De-schedule Monument	Listed Building	23/05/2018
Stirling Old Bridge	De-listed	Scheduled Monument	19/07/2018
Tullibardine Chapel	De-listed	Scheduled Monument	19/07/2018
St Margaret s Well, Holyrood Park	De-listed	Scheduled Monument	18/02/2019
Kismul Castle, Barra	De-listed	Scheduled Monument	06/03/2019
Stirling Castle	Various De-listings, Amend Scheduled Monument (Various), Amend Listing (Various)	Scheduled Monument Listed Building	04/03/2019

Details of designations for the PiCs, including these changes, can be accessed via the HES Heritage online portal: <http://portal.historicenvironment.scot>

APPENDIX B. 2018-19 CONDITION SURVEYS



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Any enquiries regarding this document should be sent to us at:
Historic Environment Scotland
Longmore House, Salisbury Place
Edinburgh EH9 1SH
+44 (0) 131 668 8600
www.historicenvironment.scot



Urquhart Castle.

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Historic Environment Scotland
Longmore House, Salisbury Place
Edinburgh EH9 1SH

0131 668 8600
historicenvironment.scot

Historic Environment Scotland Scottish Charity No. SC045925
Registered Address: Longmore House, Salisbury Place, Edinburgh EH9 1SH