

# ANNUAL OPERATING PLAN 2019-20

## Heritage For All



HISTORIC  
ENVIRONMENT  
SCOTLAND

ÀRAINNEACHD  
EACHDRAIDHEIL  
ALBA



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## WHO WE ARE

The historic environment *is* Scotland's story. It belongs to all of us. It's 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.

## WHAT WE DO

- 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.

## THE DIFFERENCE WE MAKE

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. Here are some examples of our valuable contribution to Scotland.



We generated **more than £600m** (direct) in additional tourism impact for Scotland's economy in 2018.



The tourism expenditure generated by sites in our care **supported an estimated 16,200** full time equivalent jobs in 2018.



We **spent £35m** with Scottish suppliers and contractors in 2018.



Those who visited a historic site were **over 50%** more likely to report high life satisfaction.



Between 2008 and 2018, we awarded grants of **more than £132m** that assisted repairs of **more than £528m**.



We are a significant contributor to education, skills and wellbeing programmes, with **more than 125,000** learners participating in activities supported by us in 2018.



We have compiled and published **over 55,000** designation records and responded to **over 4,000** requests for statutory advice and consents every year.



We reduced carbon emissions from our operations by **5.3%** in 2017-18, **saving 349 tonnes** of carbon against the previous year.



Over **175,000** images from the archives in our care have been digitised and made accessible online in the last two years.

# CHALLENGES AND OPPORTUNITIES

There are big challenges ahead that we will need to address in order to deliver our plans. However these challenges also present opportunities for us to do things in new and different ways to maximise the impact our work can have.



## Climate change

Climate change and the effort required to mitigate and adapt to its effects have a significant impact on the historic environment. We are still working as a society to understand this impact.



## Societal change

Our communities and lifestyles are changing; our population is ageing and shifting. This can have an impact on the historic environment, changing how we interact with it and value it.



## Intangible cultural heritage

Established ways of managing the historic environment are often based around physical structures such as buildings and monuments – but the historic environment is made up of both intangible and tangible cultural elements.



## A holistic approach to the environment

All of our landscapes – rural and urban – are part of the historic environment. Established ways of managing them don't always recognise that natural and cultural benefits and outcomes are often interdependent.



## Economic change

Changes to the economy, whether positive or negative, have an impact on the historic environment and how it is looked after and managed. The historic environment contributes to our economy and can be a source of sustainable growth.



## Community participation and empowerment

Decisions about the historic environment have an impact on people and communities. Empowering communities and broadening participation improves outcomes for people and for the historic environment.



## Regulatory change

Changes to a wide range of laws and regulations can affect the management of the historic environment. It can be hard to predict and fully understand the impact of these changes.



## Skills and capacity

Good management relies on decision-makers having access to the right skills, expertise and capacity to look after the historic environment and make informed decisions.



## Sustainable tourism

Tourism brings huge benefits to the wider economy and can provide financial resources for looking after historic sites and buildings. High visitor numbers can also affect the sites themselves, sometimes creating management challenges.



## Funding

Some historic places and sites will rely on external funding. There are difficult choices to be made about where to spend available money, and opportunities to think creatively about approaches to funding.



## Roles and responsibilities

Taking care of the historic environment is a shared responsibility. Sometimes the interests of different groups and individuals overlap, and this can cause confusion and tension about roles and responsibilities.



## Diversity, equality and access

Established ways of recognising and managing the historic environment haven't always reflected our whole society. It is important to talk about the past in a way that celebrates its diversity. The historic environment should be accessible and inclusive, providing a source of inspiration, enjoyment and learning for all.



## Creating and maintaining places

The changing places where we live, work and play, and the ways we understand and relate to them, are among the wide range of factors that affect our wellbeing. The historic environment plays a key part in making 'good places'.



## Land management

Land management affects much of the historic environment. Changes to agricultural and land use policies and practice can have a significant impact.

# WHAT WE WANT TO ACHIEVE

Our **vision** is that:

*The historic environment is cherished, understood, shared and enjoyed with pride, by everyone*

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Our new *Corporate Plan 2019 Onwards: Heritage for All*, sets out five outcomes that we want to achieve that will help us work towards this vision:

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

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

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

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**4. The historic environment inspires a creative and vibrant Scotland**

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

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These are long-term, aspirational outcomes and will take a number of years to be achieved. This *Annual Operating Plan 2019-20* outlines the activities we will undertake in the first year of the new *Corporate Plan* period to support achievement of these outcomes.

## **How we will measure success**

Our *Corporate Plan* sets out 10 Key Performance Indicators (KPIs), which we will use to measure our success in achieving our outcomes. Achievement of these KPIs will be measured against the actions and supporting indicators set out in the tables throughout this *Annual Operating Plan*, and will include an analysis of survey results, contextual data and case studies.

In order to ensure progress towards delivery, the actions and supporting indicators will be monitored closely throughout the year with risks to delivery systematically identified and managed. Results will be published in our *Annual Report and Financial Statements*. Data relating to equalities, health & safety, sickness absence, staff training, supplier payment, greenhouse gas emissions and freedom of information performance will also be reported in our *Annual Report and Financial Statements*.

We also publish a range of more detailed performance reports: *Our Place in Time Annual Performance Report*, *Properties in Care of Scottish Ministers Annual Report*, *Planning Performance Report* and *Annual Procurement Report*.

## HERITAGE AND SOCIETY

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

### WHY IT MATTERS:

The historic environment is a vital part of all of our lives, right now. It has the power to change lives for the better – to make us feel happier, more informed and better connected, to encourage us to get outdoors and get active, to speak to the diversity of our nation.

### WHAT WE WILL DO - OUR CORPORATE PLAN PRIORITIES:

#### **Create heritage without boundaries**

– widening opportunities for everyone to understand, enjoy and connect with the historic environment, making it a part of our everyday lives.

#### **Use the historic environment to build strong and sustainable communities**

– demonstrating the crucial role of heritage in placemaking.

#### **Promote knowledge about the historic environment**

– continually improving our collective understanding through research and investigation, and sharing it through interpretation, engagement and education.

#### **Use our historic places to help us live healthy and active lives**

– promoting the social impact of the historic environment at all levels and harnessing its potential to offer spaces for living, recreation, reflection and entertainment.

### OUR ACTIONS IN 2019-20

To support achievement of this outcome, in 2019-20 we will:

- Extend opportunities to harness the potential of the historic environment to improve wellbeing, including through promoting volunteering in the sector
- Increase awareness and widen opportunities to access the historic environment, focusing on groups that have not been able to engage with heritage in the past, including young people, and complementing physical access with more digital and online access opportunities
- Connect individuals and groups to the wide range of information and support available in the heritage sector
- Develop our strategic approach to engagement with partners such as Community Planning Partnerships, Growth Deals and Tourism Destination Strategies to promote the needs of the historic environment in placemaking
- Set out a clear package of support for communities, including how we can help communities to access support from other agencies and connect with others working on similar projects

### KPI 1: Increase wellbeing from Scotland's historic environment

What success will look like:

- Increased the percentage of people who self report benefit from the historic environment
- Evidence of increased impact on wellbeing such as health, happiness and satisfaction with life

Actions	Indicators for 2019-20
Extend opportunities to harness the potential of the historic environment to improve wellbeing	<ul style="list-style-type: none"><li>• Developed a framework to measure wellbeing benefits</li><li>• Increased the number of the properties in our care that engage volunteers</li><li>• Achieved Investors in Volunteers</li></ul>

### KPI 2: Increase engagement with Scotland's historic environment

What success will look like:

- Increased the numbers and diversity of people who engage with the historic environment
- Increased the range and accessibility of channels for engaging with the historic environment

Actions	Indicators for 2019-20
Increase awareness and widen opportunities to access the historic environment	<ul style="list-style-type: none"><li>• Introduced changes to our <i>Education Visits Policy</i> to better support young people from SEBD (social, emotional and behavioural difficulties) schools or schools in areas low on the <i>Scottish Index of Multiple Deprivation</i></li><li>• Implemented a communications strategy to champion the historic environment and what it means for Scotland</li><li>• Increased the number of people accessing the historic environment through digital channels</li><li>• Increased the number of young people engaged with the historic environment and worked with youth partners to enable the voice of young people to inform our work</li><li>• Developed a HES British Sign Language action plan</li></ul>
Connect individuals and groups to historic environment information and support	<ul style="list-style-type: none"><li>• Agreed an action plan to maximise the impact of our sites over the next 3-5 years, to be commenced in 2020-21</li><li>• Increased the number of landscape, site and building records, including the percentage of records achieving specific quality standards</li><li>• Led implementation of the Delivery Plan for Scotland's <i>Archaeology Strategy</i> in partnership with others</li></ul>

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

What success will look like:

- Evidence that more communities are using the historic environment in their placemaking activities
- The historic environment is increasingly integrated into local, city and regional placemaking

Actions	Indicators for 2019-20
Develop our strategic approach to engagement with partners	<ul style="list-style-type: none"><li>• Prioritised which Community Planning Partnerships to engage with, with a focus on those linked with large scale projects and Growth Deals to promote the needs of the historic environment in placemaking</li></ul>
Set out a clear package of support for communities	<ul style="list-style-type: none"><li>• Developed support and resources for use by communities working with their historic environment, collaborating with other organisations to enhance the collective support available</li></ul>



## SPOTLIGHT ON: SUPPORTING WELLBEING

Our work with communities helps to tackle some of Scotland's big challenges, such as generating sustainable economic growth, poor health, skills, and building better places to live and work in. Through our work in conserving the properties we look after and the advice we provide on planning applications, we show how the historic environment can be part of solutions to build healthy, attractive and sustainable places for all our communities.

We want people to be empowered to benefit from the historic environment. Effective placemaking capitalises on a community's assets (including heritage) to create environments that promote people's health, happiness and well-being. As the lead public body for the historic environment, we have a role to play to enhance communities' capacity to use the historic environment in their placemaking, in alignment with the *Place Standard*.







## SPOTLIGHT ON: STRENGTHENING COMMUNITIES

We want to enable communities to increase understanding of their heritage and realise the many benefits that can be derived from the historic environment at a local level. Our recording, designation and guidance work helps communities value their heritage, take control of local historic assets and enable debates about the long term planning of our environment. Through our outreach and education activities, we help a wide range of people in local communities participate in outdoor physical activity and understand and enjoy their area through volunteering and learning projects.

At local and national levels we seek strategic partnerships, for example engaging with Community Planning Partnerships *Local Outcome Improvement Plans* and locality plans, to ensure the best connection of national plans and resources with local needs and ambitions. Every year we invest millions of pounds through our grants scheme to support heritage projects, leveraging in much more investment from other areas and giving tangible social and economic benefits for local communities, including providing local jobs and upskilling young people, beyond the immediate projects we fund.



## HERITAGE AND THE ENVIRONMENT

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

### WHY IT MATTERS:

From buildings and archive collections to traditions, stories and even ways of life, the historic environment is always changing. Things will be lost – through decay, erosion, fire, neglect or, simply, just by slipping from memory. In the years ahead we need to engage much more widely, involving individuals and organisations in understanding and talking about what is most important in our heritage. It is only in this way that the historic environment will not just be conserved – but will be alive and thriving, for generations to come.

### WHAT WE WILL DO - OUR CORPORATE PLAN PRIORITIES:

#### **Look after the historic environment assets in our care**

– managing the long term future of the properties, sites, collections and archives that we look after on behalf of the people of Scotland.

#### **Encourage everyone to work together and drive support and innovation in caring for our heritage**

– promoting ‘collective stewardship’ to develop and share the knowledge, resources, skills and expertise of all who work with or depend on the historic environment – putting into practice what we have learned and learning from others.

#### **Respond to the challenges of climate change**

– making it central to our policy and practice, and better understanding, managing and mitigating its impact.

#### **Enable sustainable change in the historic environment**

– working with people, communities, government and developers to ensure decision making across all aspects of our heritage which is inclusive, informed, open and forward-thinking.

### OUR ACTIONS IN 2019-20

To support achievement of this outcome, in 2019-20 we will:

- Continue to look after and manage the properties, collections and archives in our care
- Implement the new *Historic Environment Policy for Scotland* and continue to deliver our regulatory work to promote the use and management of Scotland’s historic environment in a way that strengthens resilience and maximises positive outcomes while ensuring our decisions are open, transparent and easy-to-understand
- Lead the continued development and application of a cross-sector approach to the management of built heritage to ensure that we collectively make the best use of resources to protect significant parts of Scotland’s built environment
- Develop an approach to the sustainable management of historic sites in light of the increasing challenges from climate change and growing tourism, drawing on a robust understanding of what good practice in care and management looks like and how to apply it within our own operations and in the wider historic environment
- Stimulate thinking about the impact of climate change in the historic environment sector and beyond

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

*What success will look like:*

- Improved prioritisation of investment in the historic environment according to need
- Evidence that the historic environment is being appropriately managed to enable viable use or reuse

Actions	Indicators for 2019-20
Continue to look after and manage the properties, collections and archives in our care	<ul style="list-style-type: none"> <li>• Delivered our <i>Asset Management Plan</i></li> <li>• Commenced development of a masterplan for Edinburgh Castle</li> <li>• Prioritised the development of monument investment plans for Caerlaverock Castle, Melrose Abbey, Urquhart Castle, Doune Castle and the sites in our care in Orkney</li> <li>• Digitised a further 75,000 of the items in our archives</li> <li>• Digitally documented 5-10 properties in our care and 40-60 objects from the collections in our care</li> <li>• Agreed a plan for the long-term storage of the archives in our care</li> <li>• Updated Statements of Significance for 30 properties in our care</li> </ul>
Implement the new <i>Historic Environment Policy for Scotland</i> and continue to deliver our regulatory work	<ul style="list-style-type: none"> <li>• Updated <i>Managing Change</i> guidance</li> <li>• Dealt with 90% of regulatory activities, consultations and decisions within required timescales</li> </ul>
Lead a cross-sector approach to the management of built heritage	<ul style="list-style-type: none"> <li>• Published a <i>Built Heritage Management Plan</i></li> </ul>
Develop an approach to the sustainable management of historic sites	<ul style="list-style-type: none"> <li>• Commenced a project to consider sustainable management of our assets against changing external factors</li> </ul>

#### KPI 5: Increasingly lead the sector in climate change action

*What success will look like:*

- Reduced our own greenhouse gas emissions and evidence of reducing emissions in the wider historic environment sector
- Evidence that more of the historic environment sector is able to mitigate and adapt to the effects of climate change

Actions	Indicators for 2019-20
Stimulate thinking about the impact of climate change in the historic environment sector and beyond	<ul style="list-style-type: none"> <li>• Started implementation of an updated sector-leading <i>Climate Change and Environmental Action Plan</i>, including continuing to undertake adaptation activities at the properties in our care to ensure they are better prepared to respond to the impacts of climate change</li> <li>• Reduced our greenhouse gas emissions by 2.4%</li> <li>• Worked with partners to build understanding and create resources to support climate change adaptation in the wider historic environment</li> </ul>



## SPOTLIGHT ON: PROMOTING SUSTAINABLE MANAGEMENT OF HISTORIC SITES

The historic environment is facing an increasing number of challenges – including climate change, increasing volume and concentration of visitors, and difficulties accessing the materials and skills needed for conservation. Tourism is a cornerstone of the Scottish economy and vital to the prosperity of our regions, cities, towns and local communities. In recent years visitor numbers have grown significantly, increasing footfall across many areas of Scotland and making a substantial contribution to our income and to Scotland's tourism economy.

A balance needs to be struck between conserving historic sites, growing tourism and protecting the experience of local communities and those using the historic environment. Our traditional way of managing historic sites may no longer be fit for purpose. Those managing heritage assets are alive to the realities and difficult choices that require to be made.

Decision making can be supported by better understanding how to utilise the rich sources of data we hold on the condition of historic sites, risks from climate change, and the numbers and impact of visitors. This will allow us to take a holistic approach to the sustainable management of historic sites in light of the challenges they face.

As the lead public body for the historic environment, we want to lead the way in this work, developing our thinking about the best ways to manage not just the properties we look after on behalf of Scotland, but other assets within the wider historic environment.



**SPOTLIGHT ON:  
SUPPORTING SCOTLAND TO  
RESPOND TO CLIMATE CHANGE**

Scotland has world leading ambitions on responding to climate change. We are central to understanding the impacts of changes in the climate on our cultural heritage assets, and leading the way on mitigation and adaptation as necessary. Our *Climate Change and Environmental Action Plan 2019-24* will detail how we will work towards making our organisation and the broader historic environment more resilient to and prepared for changes in our climate.

We will continue our efforts to become an increasingly environmentally responsible organisation, alongside playing a leading role in supporting the Scottish Government to meet its ambitious carbon emission reduction targets. We have a key role to play in adapting existing traditional buildings to be less carbon 'hungry' and to promote traditional construction and materials as the truly sustainable opportunities they are.

We will use our knowledge and experience to engage throughout the wider historic environment in Scotland and beyond, and to support the transformational change that will be necessary if society is to adapt to, and mitigate the effects of, climate change.



## HERITAGE AND THE ECONOMY

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

#### WHY IT MATTERS:

Heritage is important to every part of our country. Every year, the historic environment brings in hundreds of millions of pounds to our economy and supports significant numbers of jobs. How we invest in, look after and celebrate our past is at the heart of how we make Scotland a more prosperous and equal nation.

#### WHAT WE WILL DO - OUR CORPORATE PLAN PRIORITIES:

##### **Promote sustainable tourism**

- working to make our historic sites outstanding attractions that tell Scotland's story, while respecting the needs of local communities, visitors, our cultural heritage and the environment.

##### **Encourage enterprise and investment in the historic environment**

- enabling more people to benefit from the historic environment, providing support through our own grant schemes and our role in the planning system.

##### **Advance the use of science and technology**

- working at the forefront of research and development in the historic environment and promoting the benefits of innovative new techniques.

##### **Increase the quality, availability and demand for skills**

- showing how understanding, caring for and celebrating the historic environment adds value to the economy, providing attractive career opportunities, skilled employment and business growth.

#### OUR ACTIONS IN 2019-20

To support achievement of this outcome, in 2019-20 we will:

- Maximise the impact of our investment on the economy of Scotland as a whole as well as local economies through the grants we administer
- Elevate our visitor experiences and tailor for a range of existing and new audiences
- Extend and grow sustainable procurement in the historic environment sector, including how we can support local enterprise through the way we buy goods and services
- Explore the potential to develop the Engine Shed into an international centre of excellence for heritage innovation
- Work with partners to enhance investment in research, science and skills development

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

*What success will look like:*

- Increased the amount generated for Scotland's national and regional economies from the historic environment
- The historic environment provides a greater range of opportunities for local economic activity

Actions	Indicators for 2019 20
Maximise the impact of our investment in local economies and the economy of Scotland	<ul style="list-style-type: none"> <li>• Refreshed our grants programmes to be more proactive and outcome-focused</li> </ul>
Elevate our visitor experiences and tailor for a range of existing and new audiences	<ul style="list-style-type: none"> <li>• Increased the direct and indirect contribution of the sites in our care to local economies across Scotland</li> <li>• Achieved between 205,000 and 210,000 members at the high point of the year</li> <li>• Implemented, tested and reviewed a new Visitor Experience Quality Measurement system</li> <li>• Established an internationally recognised set of attractions to benchmark visitor experience</li> <li>• Contributed to planning and delivery of events for the 2020 Themed Year: Scotland's Year of Coasts and Water</li> </ul>
Extend and grow sustainable procurement in the historic environment sector	<ul style="list-style-type: none"> <li>• Refreshed our <i>Procurement Strategy</i> with a focus on sustainable procurement and increased opportunities for local suppliers</li> <li>• Delivered a national framework for procurement of indigenous stone</li> </ul>
Explore the potential to develop the Engine Shed into an international centre of excellence for heritage innovation	<ul style="list-style-type: none"> <li>• Scoped the development of the Engine Shed into an international centre of excellence for heritage innovation</li> </ul>
Work with partners to enhance investment in research, science and skills development	<ul style="list-style-type: none"> <li>• Championed delivery of Year 1 of the <i>Historic Environment Skills Investment Plan</i> in collaboration with our delivery partners</li> <li>• Invested in 50 workforce development roles covering Modern Apprenticeships, Trainees and Craft Fellows</li> <li>• Delivered Year 1 of our <i>Research Strategy 2019-22</i>, including improving the research information on our website and developing a series of knowledge exchange activities to build partnerships</li> </ul>



**SPOTLIGHT ON:  
VISITOR EXPERIENCE**

The historic environment is Scotland's story. It is everything that has been created by people over time: the tangible and the intangible. It can be a place, an object or an idea. It can be a castle, a ruined abbey or a stone circle; a high street, a colliery or a garden; a book, an instrument – even a song or a piece of music. It is all those things that we have made, all the way up to today.

Our towns, cities and rural areas are made up of a wide range of historic places, from castles and stately homes to battlefields, standing stones and ancient ruins. Scotland also has six World Heritage Sites, highlighting the 'Outstanding Universal Value' of our cultural and natural sites and their importance across countries and generations.

Scotland's heritage forms a large part of its appeal as a tourism destination and those who choose to visit are increasingly seeking authentic experiences and opportunities. More and more people are keen to immerse themselves in local destinations with distinctive character and feel part of the community.

We are the largest operator of paid visitor attractions in Scotland, with 75 commercially-run sites. We will ensure our offer responds to visitor aspirations, seek to make our history and Scotland's story relevant at the individual level and an integral part of experiencing any destination. Reflecting its revolutionary impact on the entire visitor journey, we will invest in digital innovation to enhance interpretation and experiences.





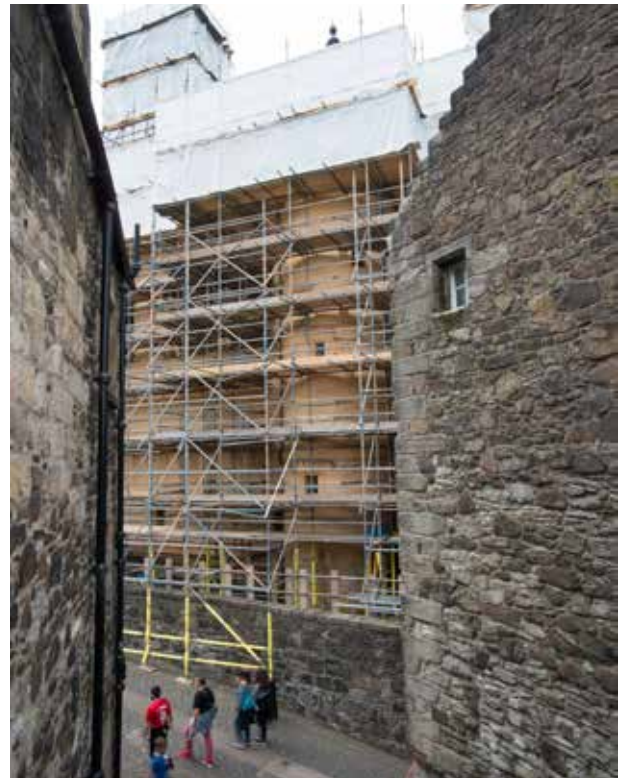


**SPOTLIGHT ON:  
CONTRIBUTION OF THE HISTORIC  
ENVIRONMENT SUPPLY CHAIN**

Management and conservation of Scotland's historic environment can have a significant impact on the wider economy. In 2018 we spent £35m with Scottish suppliers and contractors.

We know that how and where we spend money can have a significant impact on people's lives around the globe. We need to promote ethical procurement by better understanding the supply chains involved in the materials used in the historic environment.

At the same time we want to promote the use of traditional and indigenous materials to increase local economic activity. Over the next few years, our focus will be on demonstrating and promoting traditional skills and materials, highlighting that they can be dynamic, relevant and deliver economic, environmental and social benefits. We are also committed to ensuring Scotland's small and medium sized enterprises and third sector organisations have the opportunity to benefit from our activities.



## HERITAGE AND CREATIVITY

# 4. THE HISTORIC ENVIRONMENT INSPIRES A CREATIVE AND VIBRANT SCOTLAND

### WHY IT MATTERS:

The historic environment is the story of Scotland. It is not just one story, it is everyone's stories put together and how we talk about it, how we share it and what it means is not fixed. It is in everyone's hands to define what the historic environment is and what it can be, to explore its potential to influence and be influenced by everything from music, literature and art to theatre, film and gaming.

### WHAT WE WILL DO - OUR CORPORATE PLAN PRIORITIES:

#### **Celebrate the cultural value of heritage**

– using the historic environment to champion diversity and inclusiveness, and strengthen communities.

#### **Promote the historic environment as a key resource for creative inspiration**

– working with people to explore the values, meanings and uses of heritage, and developing new partnerships between the historic environment and the creative economy.

#### **Use the historic environment to enrich education and learning**

– promoting the cultural role and importance of our heritage, from buildings and places to stories and traditions, archives and information.

#### **Share our heritage with the world**

– developing innovative and creative international partnerships by opening up our historic environment to a global audience and exploring its worldwide impact and legacy.

### OUR ACTIONS IN 2019-20

To support achievement of this outcome, in 2019-20 we will:

- Explore what intangible cultural heritage as a practice means in the context of Scotland's historic environment
- Work with partners in the creative industries sector to enable groups, individuals and communities to breathe life into the historic environment, so that it becomes a vibrant part of our everyday lives
- Support the role of the historic environment in education and learning, including through technology and innovation
- Promote the place of Gaelic within Scotland's historic environment
- Build on our reputation as an international centre of expertise for heritage to create opportunities for Scotland internationally as well as broadening the reach of our heritage so it can be enjoyed by people around the world

### KPI 7: Increasingly inspire creativity and innovation

*What success will look like:*

- Increased use of the historic environment for creative inspiration, events and activities
- Evidence that our work is safeguarding intangible cultural heritage in Scotland

Actions	Indicators for 2019 20
Explore what intangible cultural heritage as a practice means in the context of Scotland's historic environment	<ul style="list-style-type: none"><li>• Developed a policy statement on our role in relation to intangible cultural heritage, with a view to working with museums and the wider creative sector on a Scotland-wide position</li></ul>
Work with partners in the creative industries sector	<ul style="list-style-type: none"><li>• Shaped an initiative to encourage increased use of the historic environment in creative industries</li></ul>
Support the role of the historic environment in education and learning	<ul style="list-style-type: none"><li>• Worked with local and national partners to use the historic environment to support formal and informal learning themes and the needs of diverse and inclusive audiences</li><li>• Developed a framework to support learning activity in the historic environment</li><li>• Developed materials based on the historic environment to be used as part of the science, technology, engineering and mathematics (STEM) curriculum</li></ul>
Promote the place of Gaelic within Scotland's historic environment	<ul style="list-style-type: none"><li>• Delivered Year 2 of our <i>Gaelic Language Plan 2018-23</i></li></ul>

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

*What success will look like:*

- Scotland's international reputation for being rich in historic buildings and sites remains strong
- Our expertise is increasingly sought after internationally

Actions	Indicators for 2019 20
Build on our reputation as an international centre of expertise for heritage	<ul style="list-style-type: none"><li>• Delivered Year 1 of our <i>International Strategy 2019-29</i>, including ensuring the organisation is able to adapt to the impact of the UK withdrawing from the EU and exploring opportunities to grow our international business and commercial partnerships</li><li>• Worked with partners to deliver <i>World Heritage Site Management Plan</i> actions</li></ul>



**SPOTLIGHT ON:  
INSPIRING CREATIVITY**

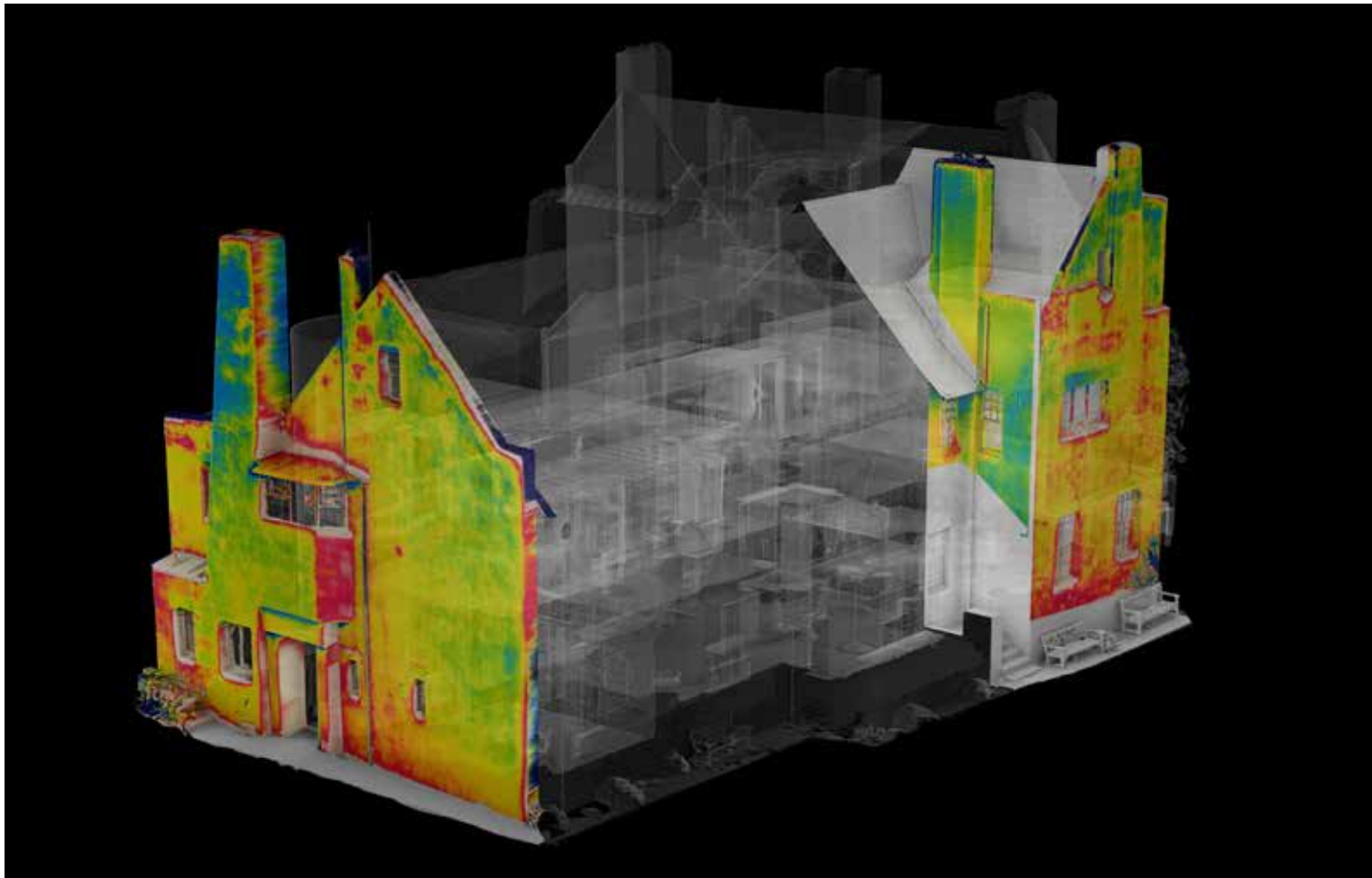
Over the centuries the history and heritage of Scotland has inspired creativity in many ways. From Walter Scott to Charles Rennie Mackintosh, Scotland's historic environment has featured in books, music, art, fashion, jewellery, gaming and much more. In turn, this work can often become part of Scotland's historic environment itself.

Most of this occurs without our involvement but there is much we can do to encourage and support people in their endeavours. The properties in our care represent some

of the most significant historic assets in Scotland. Part of our role in providing access is allowing people to use these sites for cultural events and creative purposes, including as filming locations and sites for exhibitions.

We also have a role to support and enable the use of Scotland's wider historic environment for similar purposes, whether this is through our regulatory decisions, partnerships with schools and other groups or our education and outreach activities. This work extends beyond built heritage, harnessing the value of Scotland's intangible cultural heritage as a source of creative inspiration.





## SPOTLIGHT ON: PROMOTING TECHNOLOGY AND INNOVATION

The historic environment is often thought of as being about the past but there are also huge opportunities to use it to help shape the future. Work to understand and manage the historic environment is often at the forefront of using new technology and innovating in how we make use of science and data.

As a result it provides opportunities for careers across the STEM (Science, Technology, Engineering and Maths) subjects, from using technology to analyse the composition of stone to creating digital representations of heritage sites. We want to use this work to encourage young people into STEM subjects by seeking to incorporate the historic environment into the STEM curriculum. We also want to continue to be a leader in data driven innovation and applied science.

## HERITAGE AND US

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

### WHY IT MATTERS:

Scotland's historic environment is outstanding and it is our aim to be outstanding too. We want to be seen as a world-leading heritage organisation – with our expertise in demand internationally, and the ways we work recognised as examples of how to do it right. We will aspire to be the best across all aspects of what we do – driving innovation and enterprise, but always in the service of value for money as a public body.

### WHAT WE WILL DO - OUR CORPORATE PLAN PRIORITIES:

#### **Lead and enable the historic environment sector**

– working to set the agenda, act as a catalyst, address key challenges and develop opportunities for ourselves and others.

#### **Build productive partnerships**

– making sure we are open and responsive, emphasising working together to meet the needs of people around the historic environment, and encouraging collective action.

#### **Invest in our people**

– striving to be an 'employer of choice' and creating a safe and welcoming workplace that promotes equality and diversity and that encourages and supports all staff and volunteers to develop, innovate and achieve their full potential.

#### **Demonstrate sustainability in a changing environment**

– actively prioritising our resources to deliver our outcomes in financially challenging times.

### OUR ACTIONS IN 2019-20

To support achievement of this outcome, in 2019-20 we will:

- Continue to lead the historic environment sector as we collectively deliver *Our Place in Time* and build our capability to influence wider Government policy making
- Develop a more cohesive approach to partnership working to maximise impact for us and our partners
- Focus on ensuring our people have the skills and capability needed to deliver our *Corporate Plan*
- Progress key projects to transform the way we work to be more collaborative, innovative and dynamic, enabled by technology where appropriate
- Grow and diversify income sources for the organisation to support delivery of our outcomes in financially challenging times

### KPI 9: Grow trust and confidence in HES

*What success will look like:*

- Improved our corporate reputation with stakeholders and the public
- Increased the number and range of organisations seeking to partner with us

Actions	Indicators for 2019 20
Continue to lead the historic environment sector	<ul style="list-style-type: none"><li>• Led the sector strategy working groups to deliver tangible actions to achieve the strategic priorities set out in <i>Our Place in Time</i></li><li>• Evaluated progress towards delivery of <i>Our Place in Time</i></li><li>• Developed a foresight approach to our policy work to address the big issues facing the sector</li><li>• Promoted our strategic narrative, outcomes and successes, and those of the sector, across all channels</li></ul>
Develop a more cohesive approach to partnership working	<ul style="list-style-type: none"><li>• Reviewed existing and potential new partnership opportunities to help us deliver our plans for the historic environment</li></ul>

### KPI 10: Enhance the sustainability of HES

*What success will look like:*

- Increased the diversity of our income sources
- Our people have the skills to deliver our strategic priorities

Actions	Indicators for 2019 20
Focus on ensuring our people have the skills needed	<ul style="list-style-type: none"><li>• Delivered Year 3 of our <i>People Strategy</i>, including further developing our leadership programmes</li><li>• Prepared a new <i>People Strategy</i> for 2020-23</li><li>• Delivered Year 3 of our <i>Equalities Outcomes and Action Plan</i></li></ul>
Transform the way we work	<ul style="list-style-type: none"><li>• Implemented Phase 1 of a new Corporate Management Information System and began implementation of an Electronic Document and Records Management System</li><li>• Continued rollout of IT solutions, including WiFi, unified communications and mobile devices</li></ul>
Grow and diversify income sources for the organisation	<ul style="list-style-type: none"><li>• Prepared a strategy to diversify income sources</li><li>• Generated income between £62 million and £68 million</li></ul>

## SPOTLIGHT ON: LEADING THE SECTOR

As the lead public body for Scotland's historic environment, we have been charged with leading on, and co-ordinating delivery of, *Our Place in Time*. Being a leader means not being afraid to try new things, challenge existing views and be at the forefront of thinking about policy and practice in the historic environment.

We do this across many areas of our work, from speaking up about the impact of climate change to making innovations in how we digitally scan and record built heritage. An important part of our role as lead public body for the sector is ensuring the value of the historic environment is understood by all and reflected in the policies and decisions of others. We will continually promote the value of the historic environment and the outcomes it can support for all people in Scotland and beyond.

Over the course of our new *Corporate Plan* we are striving to increase our impact. Being a strong sector leader is a key part of being a high performing organisation but is also important to the achievement of all of our outcomes.







**SPOTLIGHT ON:  
INVESTING IN OUR PEOPLE**

Our people are our most important asset. To deliver our *Corporate Plan*, we need to support our colleagues to be the best they can be. Our new *Corporate Plan* will require all of us to work in an open, collaborative and innovative way to deliver on our ambitious outcomes.

In 2019/20 we will refresh our *People Strategy* and work to embed it throughout the organisation to ensure our people are supported to continue to develop the skills, capability and leadership we need to succeed. We will also work to encourage a learning culture

throughout the organisation, recognising that we need to continually grow to ensure we have the right skills and capabilities to meet the challenges of tomorrow as well as today.

We are currently undertaking an exciting six part programme which aims to transform us and support our future success. Designed to help us continue as a forward thinking and high performing organisation, the programme aims to ensure that we have the right tools and infrastructure in place to support staff and enable us to operate in a flexible, effective and creative environment.



## RESOURCES

We are committed to achieving best value with our resources. Our budget is approved by our Board in order to deliver the aspirations of our *Corporate Plan*, this *Annual Operating Plan* and to fulfil our statutory obligations.

Our objective is to be transparent about how we allocate resources in pursuit of our outcomes.

In 2019-20 we will have a total budget of £106.2 million. We generate income from commercial activities at the properties in our care and other work. We continually seek to responsibly expand our income generation opportunities to support the delivery of our work.

Our Income and Expenditure for 2019-20:

Income	£m	Expenditure	£m
Grant in aid (Resource)	30.8	Staffing	48.1
Grant in aid (Capital)	6.0	Running costs	24.9
Capital charges	3.0	Cost of sales	6.7
Gross commercial income	65.0	Grants	14.5
Other income	1.4	Capital charges	3.0
		Investment (revenue)	3.0
		Investment (capital)	6.0
<b>Total income</b>	<b>106.2</b>	<b>Total expenditure</b>	<b>106.2</b>

# SUPPORTING GOVERNMENT OUTCOMES AND POLICIES

This *Annual Operating Plan*, along with the *Corporate Plan*, is informed by and makes a contribution to wider national strategies.

By working with our partners in the public, private and voluntary sectors to successfully achieve our five strategic outcomes, we will contribute to the achievement of the following National Outcomes in the Scottish Government's *National Performance Framework*.

National Outcomes	The historic environment makes a real difference to people's lives	The historic environment is looked after, protected and managed for the generations to come	The historic environment makes a broader contribution to the economy of Scotland and its people	The historic environment inspires a creative and vibrant Scotland	The historic environment is cared for and championed by a high-performing organisation
We have a globally competitive, entrepreneurial, inclusive and sustainable economy		●	●	●	
We are open, connected and make a positive contribution internationally			●	●	●
We tackle poverty by sharing opportunities, wealth and power more equally	●		●		●
We live in communities that are inclusive, empowered, resilient and safe	●	●		●	
We grow up loved, safe and respected so that we realise our full potential	●				
We are well educated, skilled and able to contribute positively to society	●		●	●	
We have thriving and innovative businesses, with quality jobs and fair work for everyone		●	●	●	
We are healthy and active	●	●			●
We value, enjoy, protect and enhance our environment	●	●	●	●	
We are creative and our vibrant and diverse cultures are expressed and enjoyed widely	●			●	
We respect, protect and fulfil human rights and live free from discrimination				●	●

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

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HISTORIC  
ENVIRONMENT  
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