

ANNUAL OPERATING PLAN 2018-19



HISTORIC
ENVIRONMENT
SCOTLAND

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WHO WE ARE



We are the **lead public body for Scotland's historic environment.**

Scotland's historic environment is part and parcel of our daily lives: it's our castles, standing stones and landscapes; our factories, mills and shipyards; our homes, our streets and our stories. It is a catalyst for economic growth, driving tourism, regeneration and sustainable development and fuelling improvements.

We:

- are a charity dedicated to protecting Scotland's places now and sustaining the historic environment and its benefits for future generations
- lead the delivery of Scotland's historic environment strategy *Our Place in Time* working with our partners to understand, protect and share the immense value the historic environment generates
- are at the forefront of researching and understanding the historic environment and addressing the impact of climate change on its future
- care for more than 300 properties of national importance all across the country
- look after internationally significant collections of archive material relating to the historic environment, including more than five million drawings, photographs and manuscripts
- are the largest operator of paid visitor attractions in Scotland, with 75 sites operated commercially
- provide grants of more than £14 million per year, stimulating regeneration, delivering benefits for communities, promoting sustainable economic growth and rural development and reinforcing local identity and a sense of place
- protect our places and promote sustainable development through the designation of historic environment assets, consents relating to scheduled monuments, and our role as a statutory consultee
- provide advice, guidance and training and promote participation through programmes of education, engagement and skills-sharing.

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 Historic Environment Scotland's (HES) valuable contribution to Scotland.



We generate more than £600m (direct) for Scotland's economy. The sites in our care generated more than £600m for Scotland's economy in 2017 via tourism expenditure that would otherwise not have occurred. Including multiplier effects (as these supported businesses increase their spend with suppliers, and their staff spend their income) this total impact increases to £1bn (an increase of around 20 per cent on the previous year, mainly due to the increase in international footfall).

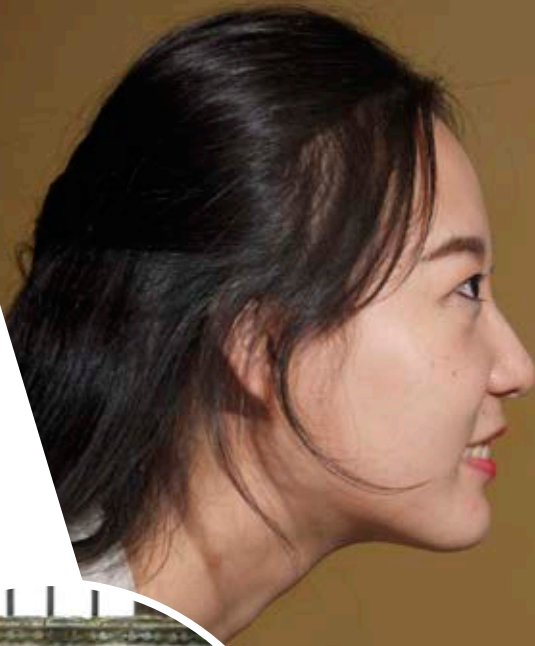


We support an estimated 16,600 full-time equivalent jobs (direct) in Scotland. The tourism expenditure generated by sites in our care supported an estimated 16,600 full time equivalent jobs, which rises to 25,500 full-time equivalent jobs including multiplier effects.



We spent more than £40m with Scottish suppliers and contractors in 2017 supporting an estimated 660 full-time equivalent jobs. Many of these contractors are SMEs (small to medium enterprises) and small specialist operators, concentrated in rural areas.





Between 2007 and 2017, we **awarded grants of more than £139m that assisted repairs of more than £595m**, evidencing the leverage (4.3:1) that historic environment investment can deliver to benefit local communities.



We are a significant contributor to education, skills and wellbeing programmes. In 2017, **more than 100,000 learners** participated in activities supported by HES access schemes, apprenticeships, community projects and inclusive learning programmes. We used the historic environment creatively, working with more than **50 national and local partners** to engage with diverse audiences and deliver innovative and inspiring experiences. We supported **20 PhDs** in 2017.



We recognise and manage Scotland's heritage now and for the future through **compiling and publishing around 56,000 designation records**, providing advice about Scotland's designated sites and places and responding to some 4,000 requests for statutory advice and consents every year. **We responded to 98 per cent** of our statutory consultations within the agreed statutory deadline.



We reduced our energy consumption by 6 per cent in 2017 in our highest energy using sites, **saving 145 tonnes of carbon**. We continue to be recognised by the World Wide Fund for Nature for our innovative work to tackle climate change.

CONTEXT AND AMBITIONS

The historic environment is multi-faceted and ever-changing, which brings many challenges, but also opportunities, for HES, the people of Scotland and beyond.

We aim to build on our successes and in all our work, we strive to provide leadership and act as an exemplar. Our ambitions are set in the context of a good budget settlement from the Scottish Government for the year ahead and our commercial income is forecast to grow due to the relative weakness of the pound, increasing visitor numbers and through product development opportunities progressed by our Enterprise subsidiary. In 2018-19, we will publish a *Visitor Strategy* which seeks to improve the quality of the visitor experience at the same time as growing our income.

Our *Investment Plan* identifies priorities across all our activities. The coming years will see us make significant investments in the properties in our care and associated collections; aiming to set high standards for conservation; welcoming visitors from around Scotland and the world; and enabling greater access to our services. We will continue to improve places and wellbeing through our grants programmes and by stepping up our work with communities and local services across Scotland.

The Year of History, Heritage and Archaeology in 2017 created increased awareness and engagement with the historic environment. The Year of Young People 2018 and the European Year of Cultural Heritage provide opportunities to build on this success and use creative ways to engage and empower diverse audiences.

Our investment in research and investigation, survey and recording, archives and collections will continue to develop a comprehensive record of Scotland's historic environment, underpinning its ongoing care and enhancing its value for future generations.

We will share our knowledge and learn from our customers, partners and stakeholders across all our activities. Innovative scientific and technical research and learning delivered through the Engine Shed, Scotland's new conservation centre, will sustain traditional skills and foster new ways of caring for the historic environment.

We aim to seize the opportunities which digital technologies offer, changing the ways in which we deliver our services, and enabling more people than ever before to enjoy the benefits of the historic environment.

While there are many opportunities, we are conscious of the challenges that affect us and our sector. Climate change is an immediate and long-term issue that affects the very fabric of the built historic environment and the landscapes to which it is connected. Our *Climate Change Risk Assessment Report* gives us new insights to help protect vulnerable places and to target valuable resources.

Political, constitutional and legislative changes impact on everything we do. We will seek to develop our understanding of Scotland's place in Europe and what that means for the historic environment when the UK withdraws from the European Union (EU).

As we reach the end of our first Corporate Plan period, we are becoming a stronger, more focused and confident organisation with innovation and customer needs at its heart. The time is therefore right to look forward and over the next 12 months we will consult widely on our new *Corporate Plan*, which will inform our work over the coming years.

Our vision:

We want Scotland's historic environment to be cherished, understood, shared and enjoyed with pride, by everyone.

Our mission:

- To enhance knowledge and understanding of Scotland's historic environment
- To protect, conserve and manage the historic environment for the enjoyment, enrichment and benefit of everyone - now, and in the future
- To share and celebrate our cultural heritage with the world

Our values:

- Collaborative: we work closely and in an inclusive way with others to achieve our goals
- Professional: we strive for excellence in everything that we do
- Innovative: we are forward-looking and creative, encouraging and embracing change
- Open: we are transparent in our business and our relationships
- Respectful: we acknowledge that what others have to say is of importance and value





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OUR PLANS FOR 2018-2019



This is the third *Annual Operating Plan* for Historic Environment Scotland. It describes what we aim to achieve in the third year of our *Corporate Plan*, building on the work of 2016-17 and 2017-18. It explains how we will invest our budget and the difference we aim to make in delivering the priorities of the *Corporate Plan* under the following themes:

LEAD

We will fulfil a leading and enabling role in the historic environment sector through our activities and by supporting, empowering and collaborating with others to secure the brightest future for our nation's historic environment.

UNDERSTAND

We will increase knowledge and understanding of the historic environment through investigation, research and recording.

PROTECT

We will protect the historic environment through regulation, conservation, collection and investment.

VALUE

We will promote the value of the historic environment through education, learning, outreach and skill-sharing.

PERFORM

We will create a high-performing organisation that is well equipped to meet day-to-day challenges, and to improve the way we work and the quality of service we provide.



LEAD



What we do: Supporting, empowering and collaborating with others to secure the brightest future for our nation's historic environment.

Why it matters: We want Scotland's historic environment to make an even stronger contribution to the cultural, social, environmental and economic wellbeing of the nation and its people. In 2017, the historic environment contributed £2.3 billion to the Scottish economy by attracting tourism and through activity in the construction sector.

COMMITMENTS FOR 2018-19

Realising the Value of Scotland's Historic Environment

We will work with others to champion its value at home and abroad, so securing wider benefits for Scotland.

During 2018-19, we will:

- **Promote Scotland around the world** by maintaining and developing networks and collaborations that help to promote Scotland on the international stage; enhance our international standing; support cultural diplomacy and extend our influence; boost trade and investment; and promote Scotland as a destination. We will work in partnership to help protect and sustain the Outstanding Universal Value of Scotland's World Heritage Sites for the future. We will publish our *International Strategy*, explore opportunities to celebrate the European Year of Cultural Heritage and work to understand the challenges and opportunities of the UK's planned withdrawal from the European Union.
- **Build a lasting legacy from the Year of Young People 2018** putting young people at the heart of everything we do, celebrating the valuable contribution they already make and creating new opportunities for them to get involved with Scotland's historic environment.
- **Promote economic, social and community benefits** by ensuring that the historic environment adds social and economic value locally and nationally.

Collective Stewardship

We must all work together to protect, develop and grow the resources, skills and expertise across the historic environment sector and the sectors on which it depends.

During 2018-19, we will:

- **Lead the delivery of *Our Place in Time***. We will support the sector to deliver the values and objectives of the historic environment strategy. This will include enabling the framework for delivery, including the five priority groups reporting to Scotland's Historic Environment Forum (SHEF), chaired by the Cabinet Secretary for Culture, Tourism and External Affairs – Built Heritage Investment; Climate Change; Heritage Tourism; Skills and Expertise; and Volunteering. We will publish a report demonstrating the impact of the sector's collective activities.
- **Build capacity and resilience by working in partnership to develop and maintain a healthy sector**. We will provide direct financial stimulus through our grants; share knowledge and expertise; target learning in areas of need; and foster skills development.
- **Develop the evidence base in collaboration with the sector**. We will work in partnership to develop and publish research that adds to the body of knowledge about the historic environment and informs decision-making, and we will support others to actively engage in research.

Addressing the Impact of Climate Change

Scotland's climate is changing with wetter winters, drier summers, increased frequency of extreme and unpredictable weather and sea level rises. These changes are predicted to continue to intensify, accelerating damaging impacts on Scotland's environment and infrastructure, with significant consequences for economy and society.

During 2018-19, we will:

- **Lead the way in climate change mitigation, adaptation and sustainability.** We will build on our published report *A Climate Change Risk Assessment* to meet the challenges of Scotland's changing climate.
- **Support the transition to a low-carbon economy** through an innovative and ambitious approach to emissions reduction.
- **Advise on adaptation of traditional buildings** to increase resilience and realise the benefits of their construction, embodied energy and sustainable build.

Strengthening Communities

We have an important enabling role for communities including specific legislative responsibilities under the Community Empowerment Scotland Act (2015).

We will help communities understand their rights, including in relation to Community Asset Transfer, and offer guidance as the lead public body for the historic environment in Scotland.

During 2018-19, we will:

- **Support community priorities** through working with public sector partners and communities to plan and deliver services that meet the needs of local people, and through promoting the significance of the historic environment in supporting the delivery of community priorities.
- **Help build community capacity** through our grants programmes and by developing productive relationships with Community Planning Partnerships and community groups to help to create better places for people to live in, work in and enjoy.





UNDERSTAND



What we do: Increase knowledge and understanding of the historic environment through investigation, research, recording and collecting.

Why it matters: We want Scotland's historic environment to be better known and understood. The historic environment is continually evolving as a result of enhanced understanding of opportunities and threats, changing social attitudes, wider development pressures and uncontrollable factors such as climate change. Managing this change requires a robust and detailed understanding of the historic environment and the context within which this change is occurring.

COMMITMENTS FOR 2018-19

Researching and Investigating

We will engage with the public and stakeholders to develop a shared understanding of the historic environment. We will undertake programmes of field investigation, survey and recording activity.

During 2018-19, we will:

- **Identify and record the historic environment and add to Scotland's National Record of the Historic Environment** through programmes of field investigation, survey and recording.
- **Research** the historic environment, its value and its challenges, developing standards, models and technologies to enable effective care and shared benefit.
- **Secure greater understanding of the historic environment through archaeological research.** The sites, landscapes, collections and archives in Scotland provide a world-class research resource. Archaeological study helps us to tell Scotland's stories in their global context.

Building Scotland's National Record of the Historic Environment

Our extensive archive of more than five million items spans a vast range of buildings, archaeological monuments and industrial and maritime sites, provides unique insights into Scotland's places, and documents how the historic environment has changed over time.

During 2018-19, we will:

- **Improve the quality** of Scotland's National Record of the Historic Environment through making it more complete and reliable.
- **Care for and develop our archives** by continuing to develop strategic approaches to their management and through improving standards and accommodation.
- **Explore storage and access options for our collections and archives**, examining how we can work more effectively with our partners around Scotland in sharing resources, expertise and infrastructure.

Sharing Knowledge

The health of the historic environment relies on a living knowledge base, developed collaboratively and shared.

During 2018-19, we will:

- **Provide information on Scotland's places and how they have changed over time** through our publications, outreach and online platforms.
- **Promote innovation** by collaborating with researchers to develop innovative products to benefit the historic environment.

Improving Access to Information and Data

Scotland's historic environment is a rich resource, with a huge range of associated information and data.

During 2018-19, we will:

- **Unlock the knowledge we create, collect and hold on the historic environment** by improving access to our data, including archives and collections, generating real value across the sector and beyond. We aim to increase the number of users visiting our websites by 5 per cent.
- **Invest in further digitisation**, providing access to more of our archive and collections than ever before at the point of user need.





PROTECT



What we do: Protect the historic environment through regulation, conservation, collection and investment.

Why it matters: Scotland's irreplaceable historic environment must be cared for and protected as it provides the backdrop to our daily lives, creates a unique sense and character of place for our cities, towns and villages, generates employment opportunities and provides the inspiration for learning and education initiatives.

COMMITMENTS FOR 2018-19

Managing Properties in our Care

As well as embodying a wealth of cultural significance, properties in our care and their associated collections play a prominent role as economic assets, and in fostering cultural identity, health and wellbeing. They support a large and growing tourism economy. They also support extensive employment, often in rural areas, and the perpetuation and development of traditional skills and commercial activity at a local and national level.

During 2018-19, we will:

- **Maintain Scotland's heritage assets and their associated collections in our care** in line with the requirements, standards and expectations set out in the Schemes of Delegation for Properties in Care (PiC). Our *Investment Plan* will direct and prioritise our expenditure.
- **Report on the current and changing condition of the PiCs** in our *Properties in Care of Scottish Ministers Annual Report*.
- **Build on our published *Investment Plan* and *Asset Management Plan*** including work on digital survey, documentation and information modelling, the first step towards developing a live asset management database.

Investing in Scotland's Historic Environment

We will work with others to ensure a holistic approach to the investment of money, time and expertise in Scotland's historic environment.

During 2018-19, we will:

- **Lead the development of a sector-wide Built Heritage Investment Plan** under the auspices of the *Our Place in Time* Built Heritage Investment Group.
- **Invest, through our own grants programmes, a further £14.5m in the historic environment**, benefiting the local economy and communities and bringing the total investment by the end of the *Corporate Plan* period to more than £43.5m.
- **Invest our time and expertise** to enable others to protect the historic environment through advice, guidance and training.

Enabling Change in Scotland's Historic Environment

We will work with the public and stakeholders to ensure change is managed effectively, efficiently and transparently.

During 2018-19, we will:

- **Influence and deliver national policy** that enhances the historic environment.
- Work with Scottish Government and other partners to deliver a **reformed planning system** that enhances Scotland's historic places.
- **Use the findings of *What's Your Heritage***, to inform new policies that will help us protect and celebrate historic sites now and in the future.
- **Ensure designation and consents-related activities are transparent and efficient.** We will deal with 90 per cent of regulatory activities, consultations and decisions within required timescales. We will publish our decisions on the heritage portal **portal.historicenvironment.scot** and publish our performance in our annual *Planning Performance Report*.

Increasing the Quality and Availability of Skills

A wide range of skills are essential to ensure we get the most from our historic environment. We will undertake and enable a range of activities to improve the quality and availability of skills across the sector and beyond.

During 2018-19, we will:

- **Publish a *Skills Investment Plan* for the sector**, working with Skills Development Scotland and key partners through the *Our Place in Time* Skills and Expertise Group.
- **Develop an ambitious traditional skills programme** that meets the needs of the historic environment and enhances the skills base. We will work in partnership with Forth Valley College and Stirling University to deliver courses leading to a postgraduate qualification.
- **Enhance opportunities for apprentices to work across our activities.** This will provide reciprocal benefits through providing new opportunities for young people and developing core skills to support the historic environment and other sectors such as the tourism and leisure industry.
- **Deliver benefits from the Engine Shed**, through innovative education and training programmes for all audiences and innovative technical and scientific research. The Engine Shed encourages understanding of traditional materials and skills amongst the public and professionals and raises standards in conservation for traditional buildings.





VALUE



What we do: Promote the value of the historic environment through enhancing access, interpretation, education and learning, outreach and skill-sharing.

Why it matters: We want Scotland's historic environment to make an even more valuable contribution to our quality of life, cultural identity, education and economy. Increasing the number and range of people who value, celebrate and enjoy the historic environment increases the contribution it makes to our national wellbeing.

COMMITMENTS FOR 2018-19

Growing Tourism through our Attractions and Experiences

Tourism is one of the most important industries in Scotland and a strong driver for inward investment. We are a major contributor to that industry. We support the delivery of the *Tourism Scotland 2020* Strategy by leading the *Our Place in Time* Heritage Tourism Group, which helps Scotland reach tourism growth targets by setting strategic direction.

During 2018-19, we will:

- **Welcome more than five million visitors to the properties in our care** from Scotland and beyond through our marketing partnerships. We will deliver services to our 200,000 members, engaging a largely local audience which, in turn, provides a

strong and committed user base for promoting the stewardship and benefits of the historic environment in Scotland.

- **Enhance visitor experiences by** focusing on the welcome, hospitality and quality of service provided at staffed sites, and deliver events programmes to bring Scotland's history to life. We will publish our *Visitor Strategy*, implement a new quality measurement system and roll out public WiFi.
- **Invest in the tourism infrastructure** to ensure that we maintain a network of high quality tourist destinations attracting visitors and engaging people all across Scotland. We will work with our partners, communities and other stakeholders to develop a strategic vision and supporting plans for prioritised sites that identify opportunities to improve the visitor experience while balancing heritage and conservation needs.

Delivering Education, Training and Learning

The historic environment makes a strong contribution to education and learning which enhances wellbeing. We will provide creative learning opportunities to reach new audiences.

During 2018-19, we will:

- **Provide learning opportunities for local, national and international audiences.** We will support the Curriculum for Excellence and initiatives such as *Developing the Young Workforce - Scotland's Youth Employment Strategy*. We will provide learning for individuals, families, communities, professionals and specialists and we will support and develop sustainable local and national partnerships.
- **Reach out to new audiences and less engaged with groups** by offering 75,000 free education places and 20,000 travel subsidies to support learners to access sites in our care. We will support partnership projects with diverse audiences across Scotland.
- **Support the Year of Young People 2018** through an inspiring range of events and activities including partnering with National Trust for Scotland and Historic Houses Association to offer Young Scot card-holders entry to our sites for £1. We will work with new partners nationally and locally to support young people not currently engaged with heritage, seeking their views to inform delivery.



Supporting and Enabling a Sense of Place

Stories, traditions and sense of place are all a part of the historic environment, which connects people to places.

During 2018-19, we will:

- **Shape and tell the story of Scotland and its places** through collaboration with communities, creative interpretation at sites in our care and through our publications, outreach and social media activity.
- **Strengthen a sense of place** which contributes to people's improved health and wellbeing.
- **Fulfil our aspirations for Gaelic** by delivering Year 1 of our *Gaelic Language Plan 2018-23*.

Promoting Heritage for All

We will engage and enthuse people from all walks of life by promoting access for all, by diversifying our volunteering opportunities and by increasing our reach through social media.

During 2018-19, we will:

- **Improve access to heritage** to make it easy for anyone who wants it to engage with the historic environment.
- **Grow opportunities for volunteering**, working with key partners through the *Our Place in Time* Volunteering Group and the Heritage Voluntary Organisers Scotland network.
- **Enhance digital access** to our products and services through innovative and enhanced technological capability and multiple digital channels.





PERFORM



What we do: We are a high-performing organisation that is well equipped to meet day-to-day challenges, and to improve the way we work and the quality of services we provide.

Why it matters: We are the lead public sector body for the historic environment in Scotland. Our performance as an organisation and the strength of our relationships affects the quality, experience and perceptions of the services that we provide.

COMMITMENTS FOR 2018-19

Enhancing our Customer Focus

Understanding the needs of our customers will drive transformation, delivering greater access to and enhanced benefits from our services.

During 2018-19, we will:

- **Develop our digital services** to provide both our new and existing customers with enhanced access to our services, including through our websites and other online channels. We will develop our *Digital Strategy*.
- **Improve service quality** by delivering to our *Service Standards*.

Building a Strong Organisation

To deliver our vision, we must build on the huge strengths, diverse experience and commitment of our people. We must make sure our people have the skills, knowledge and tools they need and our workplace must be fair, safe and foster a sense of wellbeing.

During 2018-19, we will:

- **Deliver business improvement** through working to understand the needs of our customers, service users, partners and stakeholders and delivering best value through continuous improvement.
- **Build a strong, financially stable organisation** by investing in our commercial operations, exploring other funding opportunities and undertaking long-term planning.
- **Implement Year 2 of our *People Strategy*** putting our staff at the core of our business.
- **Invest in technology** to improve the effectiveness and efficiency of our work.
- **Grow trust and confidence** in our organisation through good governance, empowering leadership and proficient service delivery informed by enhanced policy and research capability and a focused programme of stakeholder engagement.

Promoting Equality

The historic environment is important to people from all backgrounds. People want to engage with it in a range of ways, through working and volunteering in the sector, through visiting historic sites and through learning about Scotland's places by understanding the story of Scotland.

During 2018-19, we will:

- **Deliver Year 2 of our *Equality Outcomes Action Plan*** to deliver activities that promote equalities.
- **Improve engagement and participation**, remove barriers to access, widen our customer base and ensure that the historic environment makes a full contribution to the reduction of inequality in our society.

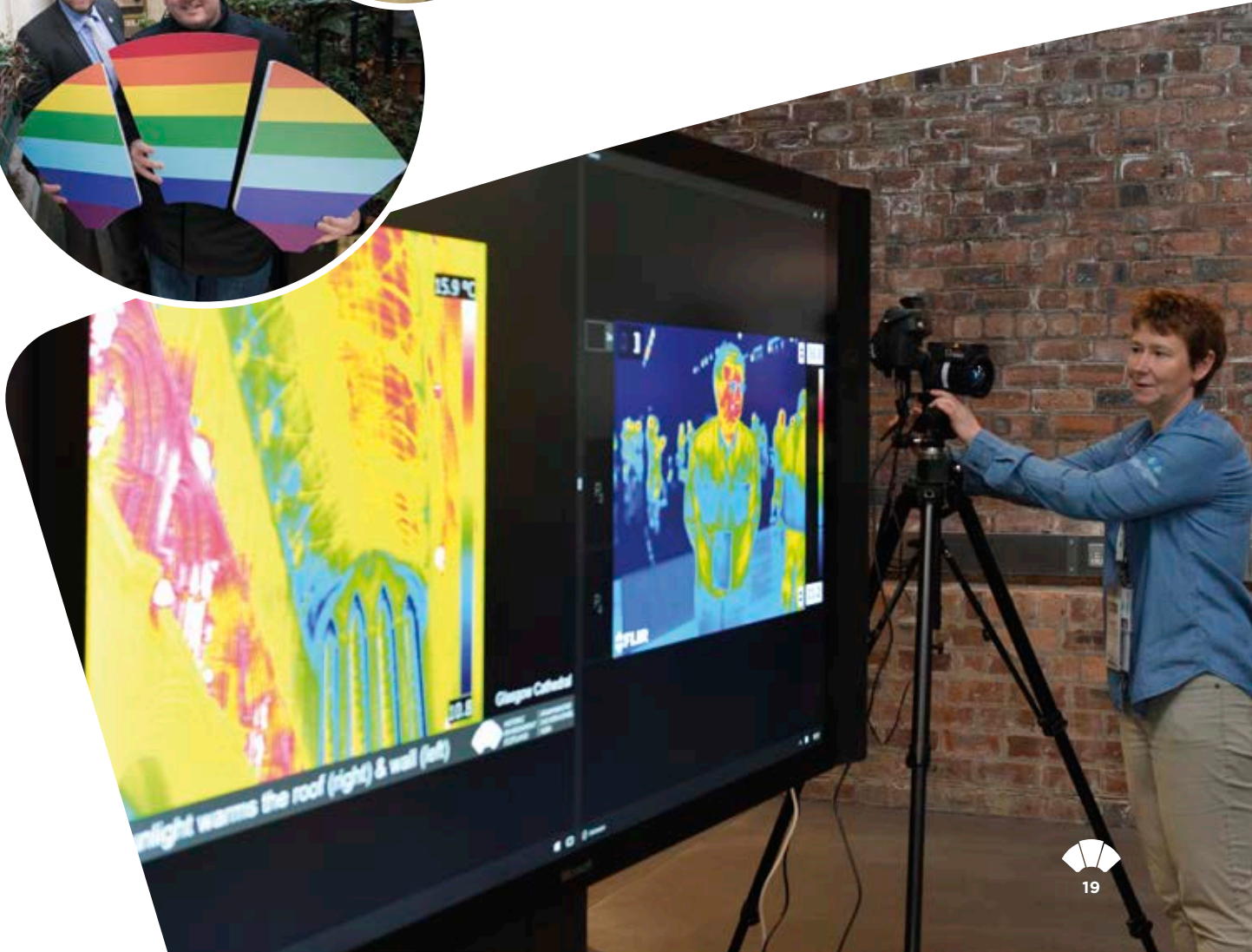
Reducing our Greenhouse Gas Emissions

As a relatively large public sector body with a wide range of functions and geographical spread, we have a duty and a significant role to play in supporting the Scottish Government's ambitious climate change targets.

We manage and operate a large and diverse property estate. Of the 336 properties in our care, 166 have a direct and significant energy requirement in the form of electricity, gas or oil.

During 2018-19, we will:

- **Reduce our greenhouse gas emissions** in line with our *Carbon Management Plan 2020* that sets out our new approach. We set a total carbon budget for the period to 2050 and we have an allowed annual budget. This aligns with Scottish Government's approach so we can track our own performance and our contribution to the Government's wider agenda.
- **Improve accountability and transparency** through publishing an annual *Sustainability Report*, which will report our performance in relation to greenhouse gas emissions, energy, waste management, business travel, biodiversity, sustainable procurement and adaptation.



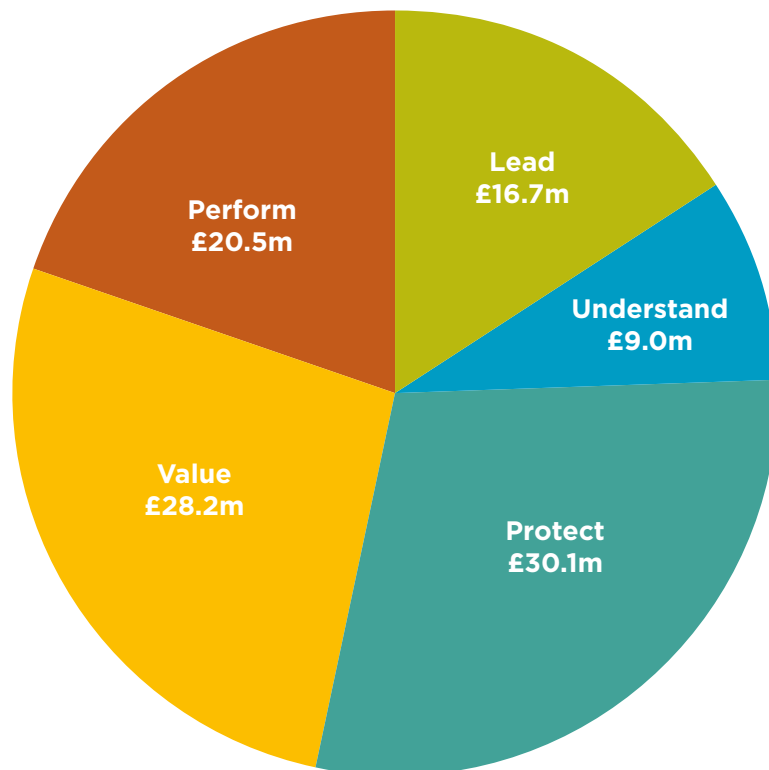
OUR RESOURCES

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*, and 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 2018-19 we will have a total budget of £104.5 million.

The chart below shows how we plan to spend our budget by strategic theme.



Our Income and Expenditure for 2018-19:

Income	£m	Expenditure	£m
Grant in aid (unrestricted)	18.1	Staffing	44.4
Grant in aid (restricted)	14.5	Running costs	24.3
Capital	6.0	Cost of sales	6.2
Capital charges	2.5	Grants	14.5
Gross commercial income	62.0	Capital charges	2.5
Other income	1.4	Investment (revenue)	6.6
		Investment (capital)	6.0
Total income	104.5	Total expenditure	104.5

Note: The *Corporate Plan 2016-19* income and expenditure projections have been updated based on the HES Budget for 2018-19.

Our People

As at March 2018, we have 1,186 Full Time Equivalent (FTE) staff.

This figure does not include seasonal staff or vacancies. It will fluctuate during the year.



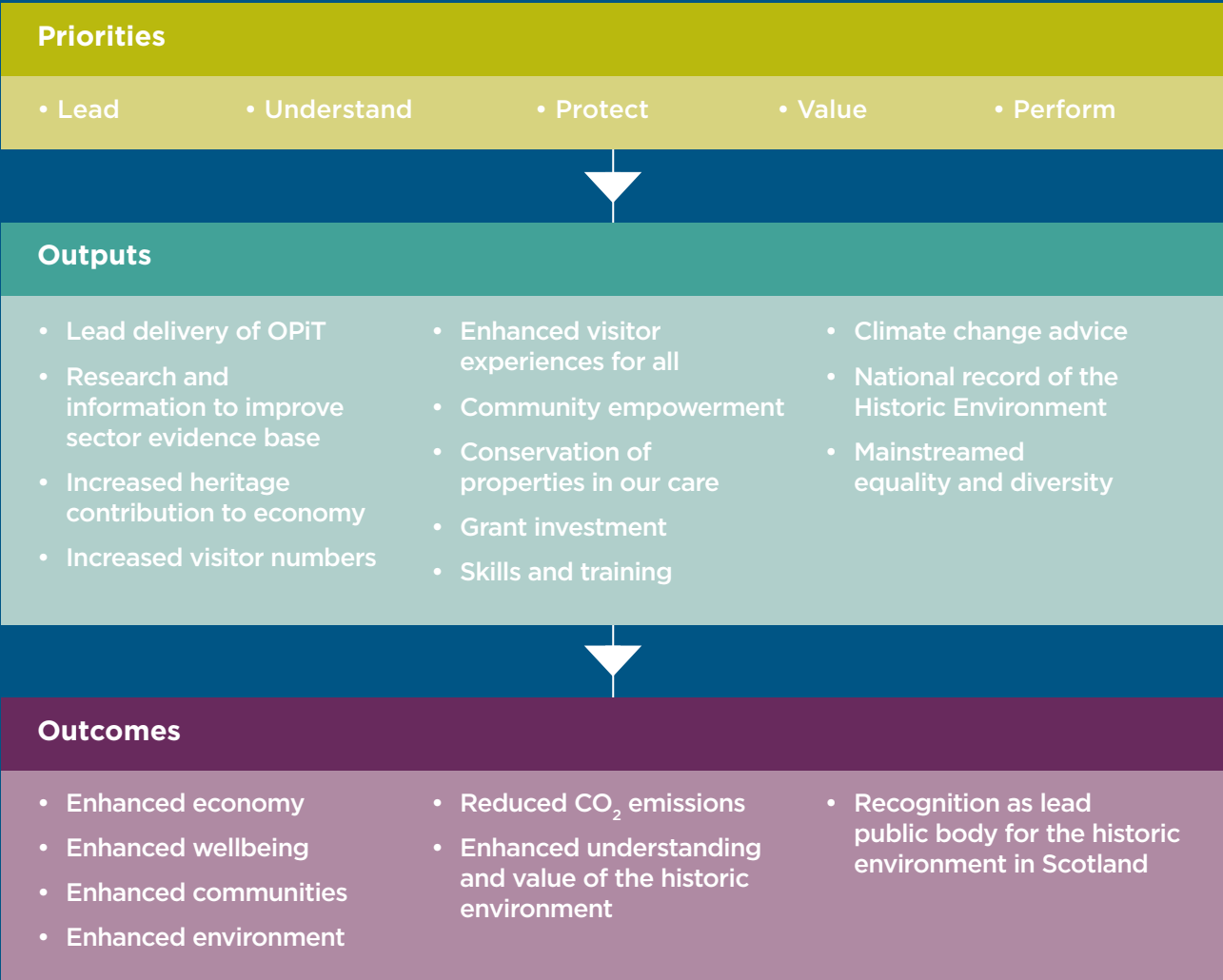
OUR PARTNERS

We work with a wide range of partners and stakeholders. While some are referenced in this Plan, success for HES, the historic environment and the people of Scotland depends on the collective commitment, action and learning of partners and stakeholders across the historic environment and beyond.



OUR IMPACT

Our activities deliver a range of impacts for the people of Scotland as illustrated in the chart below.



MEASURING SUCCESS

Our planning and performance framework aligns to the Scottish Government's National Performance Framework and to *Our Place in Time*. The following tables provide the line of sight from our *Corporate Plan 2016-19* to our *Annual Operating Plan 2018-19*.

Our *Corporate Plan* sets out high-level key performance indicators (KPIs) and targets are revised annually. In order to measure progress towards delivery, the KPIs are closely monitored throughout the year and risks to delivery are systematically identified and managed. Results will be published in our *Annual Report and Accounts*.

Data relating to equalities, health & safety, sickness absence, staff training, supplier payment and freedom of information performance is also reported in our *Annual Report and Accounts*.



Lead			
Corporate Plan KPI	Annual Operating Plan Commitment	Activities during 2018-2019	Deliverables By March 2019, we will have:
Increased the contribution of heritage tourism to the Scottish economy	Realising the Value of Scotland's Historic Environment	Promote Scotland around the world	<ul style="list-style-type: none"> Developed our understanding of the challenges and opportunities of the UK's withdrawal from the EU Worked with partners to deliver World Heritage Site Management Plan actions Published our <i>International Strategy</i>
		Build a lasting legacy from the themed years	<ul style="list-style-type: none"> Collaborated to deliver our Year of Young People 2018 programme
		Promote economic, social and community benefits	<ul style="list-style-type: none"> Maintained our contribution to heritage tourism expenditure of more than £600m Contributed to the <i>Culture Strategy</i> for Scotland to represent the historic environment
Championed the historic environment by taking the lead role in the delivery of <i>Our Place in Time</i>	Collective Stewardship	Lead the delivery of <i>Our Place in Time</i>	<ul style="list-style-type: none"> Published our <i>Annual Report</i> on the delivery of <i>Our Place in Time</i> to demonstrate the impact of the sector's collective activities
		Build capacity and resilience	<ul style="list-style-type: none"> Provided grants and training to build capacity across the sector
		Develop the evidence base in collaboration with the sector	<ul style="list-style-type: none"> Published <i>Scotland's Historic Environment Audit (SHEA) 2018</i>
Managed the impact of climate change by improving knowledge and understanding	Addressing the Impact of Climate Change	Lead the way in climate change mitigation, adaptation and sustainability and support the transition to a low carbon economy	<ul style="list-style-type: none"> Published our <i>Climate Change Annual Report</i> to demonstrate the impact of our activities
		Advise on adaptation	<ul style="list-style-type: none"> Published advice and delivered training on adaptation
	Strengthening Communities	Support community priorities and help build community capacity	<ul style="list-style-type: none"> Provided a resource for communities to help them access our support Delivered positive community outcomes through our grants programmes

Understand			
Corporate Plan KPI	Annual Operating Plan Commitment	Activities during 2018-2019	Deliverables By March 2019, we will have:
Increased knowledge and understanding of the historic environment	Researching and Investigating	Identify and record the historic environment	<ul style="list-style-type: none"> Added new information to Scotland's National Record of the Historic Environment through programmes of field investigation, survey and recording
		Research	<ul style="list-style-type: none"> Undertaken, sponsored and supported research, including up to 20 PhDs Published our <i>Research Strategy</i>
		Secure greater understanding of the historic environment through archaeological research	<ul style="list-style-type: none"> Allocated grants for rescue archaeology and research through the Archaeology Programme Worked with lead bodies in the sector to deliver Scotland's <i>Archaeology Strategy</i>
	Building Scotland's National Record of the Historic Environment	Improve the quality of Scotland's National Record of the Historic Environment and care for and develop the archive	<ul style="list-style-type: none"> Increased the proportion (%) of Canmore records that meet specific quality standards Prepared a development plan for long-term storage of and access to our archives
	Sharing Knowledge	Provide information on Scotland's places and how they have changed over time	<ul style="list-style-type: none"> Delivered publications, outreach and online services, including training and community activities by Scotland's Urban Past
		Promote innovation	<ul style="list-style-type: none"> Used innovative survey techniques in partnership with others
	Improving Access to Information and Data	Improve access to data to unlock knowledge	<ul style="list-style-type: none"> Played our role in <i>Scotland's Historic Environment Data (SHED) Strategy</i> delivery Increased the number of users visiting HES websites by 5 per cent
		Invest in further archival and collection digitisation	<ul style="list-style-type: none"> Increased the number of collection items digitally accessible online, in line with the <i>SHED Implementation Plan</i>

Protect			
Corporate Plan KPI	Annual Operating Plan Commitment	Activities during 2018-2019	Deliverables By March 2019, we will have:
Improved the condition of Scotland's historic environment	Managing Properties in our Care	Maintain Scotland's heritage assets and associated collections in our care; and report on the current and changing condition of PiCs	<ul style="list-style-type: none"> Managed, repaired and maintained properties in our care in line with the Schemes of Delegation Published <i>Properties in Care of Scottish Ministers Annual Report</i>, which includes measures of condition Delivered our <i>Asset Management Plan</i> and Year 2 of our <i>Investment Plan</i>
	Investing in Scotland's Historic Environment	Lead the development of a sector-wide <i>Built Heritage Investment Plan</i>	<ul style="list-style-type: none"> Delivered a plan informing a Scotland-wide Built Heritage Investment approach working with the <i>Our Place in Time</i> Built Heritage Investment Group
		Invest through our own grants programme	<ul style="list-style-type: none"> Invested at least £14.5m through historic environment grants
		Invest our time and expertise to enable others to protect the historic environment	<ul style="list-style-type: none"> Provided advice, guidance and training on technical conservation, grants and heritage management
	Enabling Change in Scotland's Historic Environment	Influence and deliver national policy that enhances the historic environment and builds on the findings of <i>What's Your Heritage</i> to help shape policy	<ul style="list-style-type: none"> Contributed to consultations on the Planning (Scotland) Bill Supported the preparation of National Planning Framework 4 and the review of Permitted Development Rights Drafted a replacement <i>Historic Environment Policy Statement</i> drawing on the conclusions of <i>What's Your Heritage</i>
		Ensure designation and consents-related activities are transparent and efficient	<ul style="list-style-type: none"> Dealt with 90 per cent of regulatory activities, consultations and decisions within required timescales Published annual <i>Planning Performance Report</i>
	Increasing the Quality and Availability of Skills	Develop a <i>Skills Investment Plan</i> and programme	<ul style="list-style-type: none"> Published a <i>Skills Investment Plan</i> for the sector Worked with Skills Development Scotland and key partners to deliver a traditional skills programme
		Enhance opportunities for apprentices to work across our activities	<ul style="list-style-type: none"> Provided a minimum of 35 Modern Apprenticeships across our activities
		Deliver benefits from the Engine Shed	<ul style="list-style-type: none"> Welcomed 10,000 visitors Delivered school visits for at least 2,000 pupils Delivered a programme of events for professionals and the public

Value				
Corporate Plan KPI	Annual Operating Plan Commitment	Activities during 2018-2019	Deliverables By March 2019, we will have:	
<p>Enhanced engagement with the historic environment</p> <p>Provided excellent service to our visitors and service users</p>	Growing Tourism through our Attractions and Experiences	Welcome visitors to properties in our care	<ul style="list-style-type: none"> Attracted more than five million visitors to sites Achieved 200,000 members at the high point of year 	
		Enhance visitor experiences	<ul style="list-style-type: none"> Published our <i>Visitor Strategy</i> Implemented a new quality measurement system 	
		Invest in the tourism infrastructure	<ul style="list-style-type: none"> Delivered a prioritised programme of investment in our visitor facing operations at properties in our care Delivered visitor safety and security measures 	
	Delivering Education, Training and Learning	Provide learning opportunities and reach out to new audiences and less engaged with groups	<ul style="list-style-type: none"> Provided 75,000 free education visits Provided 20,000 travel subsidies (school) Worked on more than 50 partnership projects with diverse audiences across Scotland 	
		Support the Year of Young People 2018 and its legacy	<ul style="list-style-type: none"> Delivered an innovative programme to support the Year of Young People 2018, co-produced and co-delivered with young people 	
	Supporting and Enabling Sense of Place	Shape and tell the story of Scotland and its places and strengthen sense of place	<ul style="list-style-type: none"> Updated Statements of Significance for 30 properties in our care Delivered Year 1 of our <i>Gaelic Language Plan 2018-23</i> 	
		Promoting Heritage for All	Improve access to heritage	<ul style="list-style-type: none"> Demonstrated that we have reduced barriers to accessing heritage
			Grow opportunities for volunteering	<ul style="list-style-type: none"> Implemented our 2018-19 action plan to grow volunteering Delivered joint initiatives to promote and support volunteering and developed new approaches through the <i>Our Place in Time</i> Volunteering Group
		Enhance digital access	<ul style="list-style-type: none"> Increased impressions on our social channels by 12 per cent Attracted 10 per cent of followers on Facebook, Twitter and Instagram aged 13-24 	

Perform			
Corporate Plan KPI	Annual Operating Plan Commitment	Activities during 2018-2019	Deliverables By March 2019, we will have:
We are an efficient resilient and sustainable organisation	Enhancing our Customer Focus	Develop our digital services	<ul style="list-style-type: none"> Developed our <i>Digital Strategy</i>
		Improve service quality	<ul style="list-style-type: none"> Delivered services in line with our <i>Service Standards</i>
Our staff are fully engaged in the transformation Created an organisation that earns respect as the lead public body for the historic environment	Building a Strong Organisation	Deliver business improvement	<ul style="list-style-type: none"> Delivered 3 per cent (£1.2m) efficiency savings in line with Scottish Government's Efficient Government Programme Delivered Year 1 of our <i>Business Improvement and Internal Audit Plan 2018-21</i>
		Build a strong financially stable organisation	<ul style="list-style-type: none"> Generated income from PiCs and commercial activities of at least £62m Delivered the <i>Annual Business Plan</i> for HES Enterprises
		Implement our <i>People Strategy</i>	<ul style="list-style-type: none"> Delivered Year 2 of the three key strategic frameworks of our <i>People Strategy</i> (Health and Wellbeing, Learning and Development and Resourcing) Delivered Year 1 of our Leadership Programme Worked towards Investors in People accreditation Maintained Average Working Days Lost of no more than 7.5
		Invest in technology	<ul style="list-style-type: none"> Commenced delivery of our <i>IT Business Plan</i> which directs our investment in technology
		Grow trust and confidence in HES	<ul style="list-style-type: none"> Improved our corporate reputation measured by the TRI*M index 2018 Drafted and consulted on our next <i>Corporate Plan</i> which will take effect in 2019
We actively promote equalities	Promoting Equality	Implement our <i>Equalities Outcomes and Action Plan</i>	<ul style="list-style-type: none"> Delivered Year 2 of our <i>Equality Outcomes and Action Plan</i>
Reduced our carbon emissions in line with our <i>Carbon Management Plan</i>	Reducing our Greenhouse Gas Emissions	Reduce our greenhouse gas emissions	<ul style="list-style-type: none"> Reduced our greenhouse gas emissions in line with our <i>Carbon Management Plan</i>, by 2.4 per cent (emitting no more than 6,371 tonnes CO₂)
		Improve accountability and transparency	<ul style="list-style-type: none"> Published our <i>Annual Sustainability Report</i>

Scottish Government Objectives

We support the Scottish Government’s Purpose of Sustainable Economic Growth; *A Nation with Ambition: The Scottish Government’s Programme for Scotland 2017-18*; and *Scotland’s Economic Strategy*. By working with our partners in the public, private and voluntary sectors to successfully achieve our strategic

outcomes and objectives, we will contribute to the achievement of the Scottish Government’s Strategic Objectives and the following National Outcomes in Scotland Performs. The Scottish Government will publish a revised National Performance Framework in 2018.

NATIONAL OUTCOMES	LEAD	UNDERSTAND	PROTECT	VALUE	PERFORM
We live in a Scotland that is the most attractive place for doing business in Europe	■		□	■	
We realise our full economic potential with more and better employment opportunities for our people	■	□	■	■	■
We are better educated, more skilled and more successful, renowned for our research and innovation	□	■	■	□	□
Our young people are successful learners, confident individuals, effective contributors and responsible citizens		□	■	■	
Our children have the best start in life and are ready to succeed			□		
We live longer, healthier lives			□	■	
We have tackled the significant inequalities in Scottish society	□	□	□	□	■
We have improved the life chances for children, young people and families at risk					
We live our lives safe from crime, disorder and danger			□		
We live in well-designed, sustainable places where we are able to access the amenities and services we need	□	□	■	□	
We have strong, resilient and supportive communities where people take responsibility for their own actions and how they affect others	■	□	□	■	
We value and enjoy our built and natural environment and protect it and enhance it for future generations	■	■	■	■	■
We take pride in a strong, fair and inclusive national identity	■	□	□	□	■
We reduce the local and global environmental impact of our consumption and production	■	□	□	□	■
Our people are able to maintain their independence as they get older and are able to access appropriate support when they need it		□		□	
Our public services are high quality, continually improving, efficient and responsive to local people’s needs	□	□	□	□	■

Wealthier & Fairer
Smarter
Healthier
Safer & Stronger
Greener

Scotland’s Strategic Objectives

■ HES makes a direct contribution to the National Outcome □ HES makes an indirect contribution to the National Outcome

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

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



HISTORIC
ENVIRONMENT
SCOTLAND

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SUPPORTING
year of young people
bliadhna na h-òigridh
2018