OVERVIEW OF ASSET MANAGEMENT IN HISTORIC ENVIRONMENT SCOTLAND

2018

HISTORIC ENVIRONMENT SCOTLAND | ÀRAINNEACHD EACHDRAIDHEIL ALBA

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Cover image: Smailholm Tower from the south

INTRODUCTION

Historic Environment Scotland manages a diverse range of assets. These assets include physical operational infrastructure, extensive archives and collections, datasets and other forms of information. Some of these assets are historic in nature, others are more contemporary. In delivering our functions, we generate new information assets on a daily basis. How we deploy and manage those assets has the potential to add significant value to our corporate objectives and to realise benefits for others.

1.0 DEFINING ASSET MANAGEMENT

ISO 55000 defines asset management as the *"co-ordinated activity of an organisation to realise value from assets".* In turn, assets are defined as *"An asset is an item, thing or entity that has potential or actual value to an organisation".*

Asset Management involves the balancing of costs, opportunities and risks against the desired performance of assets, to achieve the organisational objectives. This balancing might need to be considered over different timeframes. Asset Management is the art and science of making the right decisions and optimising the delivery of value *(courtesy of the Institute of Asset Management)*.

Our assets may be defined as being human, physical, intangible and information in nature in line with a standard organisational asset model.
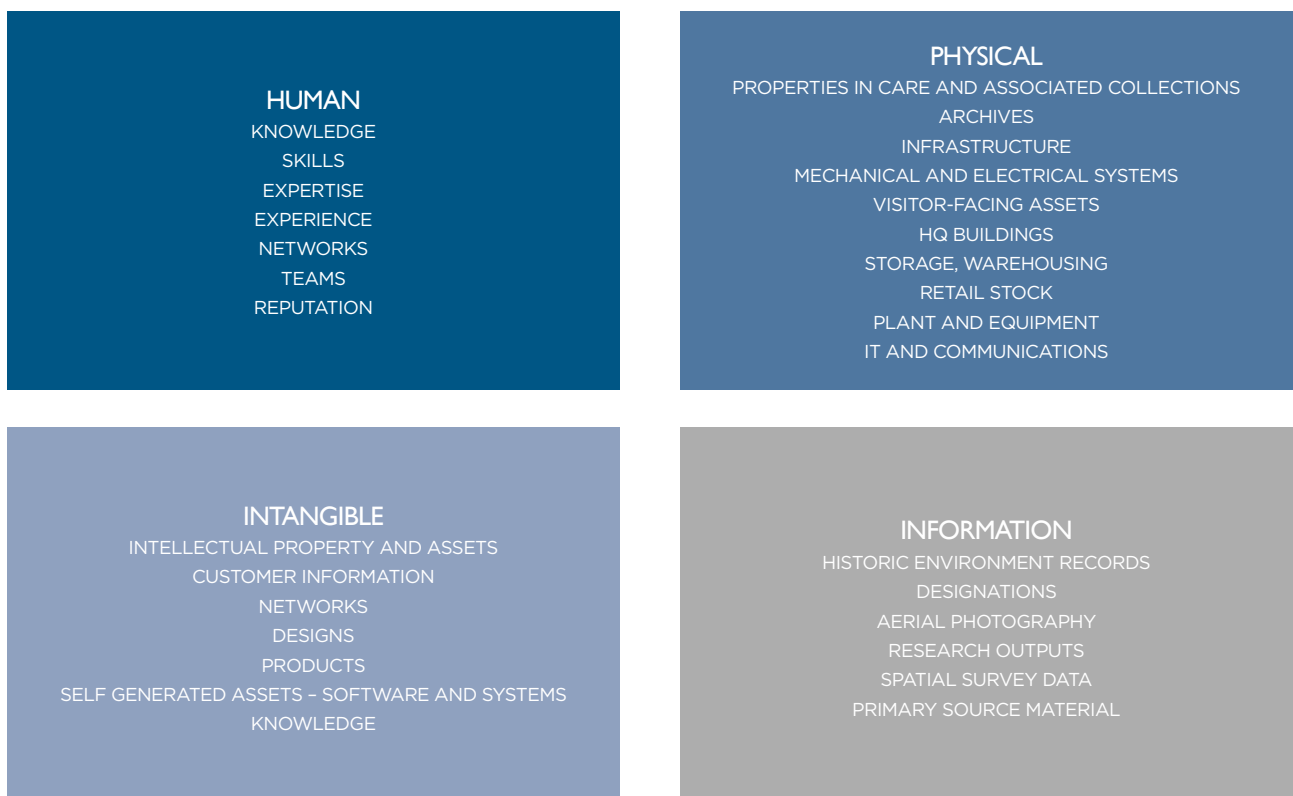
HUMAN
KNOWLEDGE
SKILLS
EXPERTISE
EXPERIENCE
NETWORKS
TEAMS
REPUTATION

PHYSICAL
PROPERTIES IN CARE AND ASSOCIATED COLLECTIONS
ARCHIVES
INFRASTRUCTURE
MECHANICAL AND ELECTRICAL SYSTEMS
VISITOR-FACING ASSETS
HQ BUILDINGS
STORAGE, WAREHOUSING
RETAIL STOCK
PLANT AND EQUIPMENT
IT AND COMMUNICATIONS

INTANGIBLE
INTELLECTUAL PROPERTY AND ASSETS
CUSTOMER INFORMATION
NETWORKS
DESIGNS
PRODUCTS
SELF GENERATED ASSETS – SOFTWARE AND SYSTEMS
KNOWLEDGE

INFORMATION
HISTORIC ENVIRONMENT RECORDS
DESIGNATIONS
AERIAL PHOTOGRAPHY
RESEARCH OUTPUTS
SPATIAL SURVEY DATA
PRIMARY SOURCE MATERIAL

FIGURE 1: Organisational Asset Model (After the Institute Of Asset Management)

2.0 CONTEXT FOR ASSET MANAGEMENT

The delivery of asset management sits within a broader legislative and policy context of Scotland's strategy for the historic environment, *Our Place in Time*. Historic Environment Scotland's (HES) corporate objectives are aligned with contributing to and delivering this strategy and the delivery of asset management has significant potential to contribute to both.

As the lead public body for the historic environment, HES can set an example to the sector to lead, enable and innovate through the management of our own assets.

Our Asset Management is closely aligned with our Corporate Plan in delivering our vision, mission and the outcomes from our five strategic themes.

3.0 STRATEGIC ASSET MANAGEMENT IN HES

A sound approach to the management of our assets of all forms is critical to our strategic and operational success.

Understanding the needs of these assets, their development, decline and renewal allows us to make informed decisions on their care and ensure we have the right competences and systems to manage them effectively.

Good-quality data asset management ensures evidence-based decision-making and prioritisation,

and acknowledgement that there are inevitably gaps in our knowledge base.

Our asset management is embedded in our Corporate Plan and Operating Plan. In broad terms, the assets of Historic Environment Scotland can be codified using the Organisational Asset Model.

Particular asset management disciplines and teams are focused on particular areas. Discreet assets have specific strategies, work plans and programmes. This is illustrated in the table opposite.

Blackness Castle

PHYSICAL		
ASSET	**NOTES**	**DELIVERY ROUTE**
Properties in care and associated collections	On behalf of Scottish Ministers, 336 site assets across Scotland with associated collections.	Properties in Care Asset Management Plan
Associated collections, PICs	On behalf of Scottish Ministers.	Collections Management Plan
HES Archive collection	National record of the historic environment in Scotland comprising more than five million items.	Archives Management Plan
Infrastructure	Car parks, access roads, bridges, piers, drainage systems, waste handling, staff welfare.	Properties in Care Asset Management Plan
M&E Systems	Mechanical and electrical systems that support operations of our built assets.	Properties in Care Asset Management Plan
Visitor-facing assets	Those assets that are designed to deliver our visitor-facing activities, including ticketing, visitor welfare, retail, catering, education spaces, exhibition space.	Properties in Care Asset Management Plan covers operational assets. Visitor strategy covers investment (to be developed)
HQ buildings	Longmore House and John Sinclair House in Edinburgh.	Corporate buildings Asset Management Plan (to be developed)
Storage and warehousing	Archive and collections storage. Materials storage. Retail stock storage.	-
Retail stock	Inventory for sale in our shops and online.	Commercial strategy
Materials	Stock holdings of construction materials or other consumables.	Properties in Care Asset Management Plan
Plant and equipment	Specialist vehicles, construction and maintenance equipment.	Properties in Care Asset Management Plan
IT and communications	Hardware and software systems that support delivery of our business.	IT Strategy
Specialist survey and scientific equipment	Field surveying and remote monitoring equipment. Static and portable scientific equipment.	Within operational plans
Ancillary properties	Properties often associated with, but not considered part of, the properties in care of Scottish Ministers. Might include accommodation or residences. Specialist archival and museums storage and warehousing. Archive and collections storage. Materials storage. Retail stock storage.	Corporate buildings Asset Management Plan (to be developed)
Cash	Realisable cash assets.	-
Fleet	Vehicles owned by HES including cars, vans, specialist vehicles and boats.	Fleet Transport Policy

INFORMATION		
ASSET	**NOTES**	**DELIVERY ROUTE**
Records	Organisational records, staff information. Research records and information. Design and project delivery information. Design schemes. Maintenance records.	Records Management Strategy
Survey information	Spatial survey information including hand-drawn records, photographs, digital documentation assets.	Rae project and Properties in Care Asset Management Plan. Survey and Recording Operational Plan for broader historic environment (included in National Record and Archive)
Analytical data	Data sets and assets in raw or processed form.	–
Customer information	Information relating to our customers, stakeholders and clients.	Records Management Strategy
Web services	Canmore, Scran, Britain from Above, Scotland's Places, NCAP, Heritage Portal, HES Collections etc are all websites delivering key historic environment, archival and collections information to users around the globe.	Operational plans, Archives Asset Management Plan (in preparation); Digital strategy
Aerial photography	The National Collection of Aerial Photography (NCAP) is one of the world's largest collections of aerial imagery, comprising more than 26 million aerial images.	Archives Management Plan

INTANGIBLE		
ASSET	**NOTES**	**DELIVERY ROUTE**
Intellectual property	Legal rights in HES (and predecessors) creations. Rights in physical, digital and intellectual assets – photos, drawings, research, digital material, scans etc.	–
Designs	Equipment and solutions-based engineering for physical assets and operational purposes.	–
Products	–	–
Self-generated digital system assets	Apps, interactive digital assets, city or building models, 3D models.	–

HUMAN		
ASSET	**NOTES**	**DELIVERY ROUTE**
Knowledge	Accumulated information and expertise created through delivery, research and experience held by our staff.	HES People Strategy
Skills	Vocational skills ranging from building craft skills to specialist conservation.	HES People Strategy and specialist area plans
Expertise	Specialist professional knowledge including science, planning, archaeology, architecture, surveying, retail, historians, finance, HR, collections and archives.	HES People Strategy and specialist area plans
Experience	Organisational experience in the delivery of our statutory functions.	HES People Strategy
Networks	Established networks associated with our operations within Scotland, the UK and overseas. Partner organisations.	Corporate and operational engagement management
Teams	Groups of staff with expertise and experience in delivering particular functions.	HES People Strategy
Reputation	-	–

Melrose Abbey

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