OUR PLACE IN TIME THE HISTORIC ENVIRONMENT STRATEGY FOR SCOTLAND

Annual Report 2017

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Introduction, Cabinet Secretary For Culture, Tourism and External Affairs





I am delighted to introduce the second annual report on the progress we have made in implementing the Historic Environment Strategy for Scotland – *Our Place in Time*.

Since the Strategy's launch in 2014 we have achieved a great deal for Scotland's historic environment and this is well borne out by the wide range of activities highlighted in this Report.

In particular, I would like to highlight the development of a joint common statement on Landscape and the Historic Environment. This was a major achievement in relation to an issue of fundamental importance to Scotland's historic environment.

Its successful development and publication was the result of strong partnership and collaboration and it shows just what can be achieved when different sectors work in partnership.

I am very proud to have been part of that process in my role as Chair of the Strategic Historic Environment Forum (SHEF) which provides strategic advice and guidance on how best to deliver our shared priorities for the historic environment as outlined in *Our Place in Time*.

I would like to thank the members of the Forum for their insightful and informed contribution to the work of the group.

This document, which covers the period from October 2015 to March 2017, reports on how colleagues from across the sector and beyond are helping to raise the profile of the historic environment across Scotland and highlights the achievements of the Strategy working groups and the many other organisations and individuals who are contributing to the delivery of *Our Place in Time's* strategic priorities.

The report also outlines the changes that the Forum has made to the Our Place in Time delivery model to recognise Historic Environment Scotland's role as the lead public body for the sector; to improve delivery mechanisms; and to reprioritise activity to address the challenges we face.

The outcome of the 2016 EU Referendum has brought with it new challenges and uncertainty. As a sector, we need to deal with both the immediate and longer-term impacts of the UK vote to leave the EU. The full impact of the EU referendum and what a Brexit deal might look like for Scotland is likely to remain unclear for some time to come.



Strategic Historic Environment Forum, May 2017

SHEF now routinely considers Brexit- related issues, and the potential implications for the historic environment sector; including European Union funding and research, heritage tourism and the visitor economy, workforce issues, and legislation and regulations.

Scotland is – by its nature – a welcoming country, proud of its history and culture and keen to share that with the world. Our historic environment sector will continue to play a major role in promoting that message internationally to people who would like to come to visit, live and work here. It is important, therefore, that we continue to work collaboratively and constructively to help deliver our shared strategic objectives for Scotland's rich historic environment.

The wide range of activities described in this Report demonstrate just what we can achieve in partnership, and they also illustrate the strength of delivering for our historic environment through an agreed strategic framework. All of this activity is delivering real benefits for the people of Scotland and provides all of us with a solid foundation of achievement on which to build going forward.

I would like to thank all the many individuals and organisations who have contributed to the delivery of Our Place in Time to date and I commend this report to everyone with an interest in Scotland's historic environment.

Fran Why

Fiona Hyslop Cabinet Secretary for Culture, Tourism and External Affairs

Forum Members















Fiona Hyslop MSP (Chair) Cabinet Secretary for Culture, Tourism and External Affairs, Shulah Allan: Convener, Scottish Council for Voluntary Organisations Convener, Petra Biberbach: Chief Executive, PAS, StephenCarter: Archaeological Consultant, Headland Archaeology, Bill Drummond: Managing Partner, Brodies LLP, Manus Fullerton: Chair, Museums Galleries Scotland, Stephen Hagan: (Former) COSLA Spokesperson for development, Economy and Sustainability, Mark Hopton: Partner LDN Architects, Sir Moir Lockhead: Chair, National Trust for Scotland, David Johnstone: Chair, Scottish Land and Estates, Eleanor McAllister OBE: Economist and Planner, William MacLeod: Chair, New Lanark Trust, Maria Perks: Chair, Association of Preservation Trusts, Graeme Purves OBE: Chair, Built Environment Forum Scotland, Ian Ross OBE: Former) Chair, Scottish Natural Heritage, Jane Ryder OBE: Chair, Historic Environment Scotland, Chris Stewart: Director, Chris Stewart Group

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Achievements at a Glance



- On-going mainstreaming of the historic environment at the heart of government.
- On 1 October 2015, Historic Environment Scotland took up its full powers as the lead public body for Scotland's historic environment.
- In May 2016, Historic Environment Scotland launched its first Corporate Plan for the period 2016-19. Titled *For all our futures*, this plan that closely aligns with the Strategic priorities of Our Place in Time.
- A review and restructuring of the delivery model to improve the delivery of our shared vision for the historic environment over the life of the Strategy.
- Publication of the first Historic
 Environment Outcomes Framework that will underpin the measurement of our success in delivering the Strategy.

- Publication of Scotland's Historic Environment Audit 2016.
- Publication of the Archaeology Strategy delivery plan.
- A wide range of events, activities and opportunities for engagement were planned and delivered by historic environment organisations for the Themed Years.
- Publication of Historic Environment Scotland Policy Statement 2016.
- Publication of the *Volunteering in the Historic Environment* research report by Volunteer Scotland that will provide a foundation for future work.
- Publication of common statement on Landscape and the Historic Environment.

The Strategy Cycle

The Strategy Cycle diagram demonstrates the relationship between the vision, principles, priorities and outcomes which are the key components of the *Our Place in Time* strategic framework.





Strategic Priorities

The following strategic priorities were identified and agreed by a wide range of individuals and organisations from the sector and beyond during the development of *Our Place in Time*.

They reflect the scale of the ambition which we have for our historic environment to be understood, cared for and protected, enjoyed and enhanced.

1. Ensure that **decision making is informed** and that sound evidence based information is available at all levels of decision making.

2. Encourage **high-quality leadership** and collaborative working at all levels and facilitate the creation of partnerships to achieve outcomes that enhance the economic, social and environmental wellbeing of Scotland.

3. **Develop the skills** and capacity at all levels that are needed to manage, nurture and enjoy the historic environment across all our communities.

4. **Mainstream** the historic environment – ensuring the historic environment lies at the heart of a modern, dynamic Scotland.

5. Continue to **develop knowledge** and apply **new technologies** and techniques to improve what we know, often through strategic partnerships, to aid our understanding of the historic environment.

6. To make **knowledge** about our historic environment as **accessible** as possible and useful as possible to the widest audience – and to ensure its long-term preservation for future generations.

7. Continue to develop a **holistic and sustainable** approach to the management of the historic environment.

8. Continue to apply (and develop) effective and proportionate **protection and regulation** with controls and incentives.

9. Ensure capacity by supporting and enabling people to engage with the historic environment, making the values of the historic environment accessible to everyone.



The Delivery Model

In December 2015 we initiated a review of the *Our Place in Time* delivery model that had been established in 2014 to support the delivery of the new strategy while the creation of Historic Environment Scotland was in progress.

As part of this process, the Built Environment Forum of Scotland (BEFS) hosted a workshop in May 2016 for members of the thematic working groups to review and reflect on the operation of the delivery model, as well as progress to date in delivering the strategic priorities set out in *Our Place in Time*. The report from this workshop recommended areas where improvement could be made in relation to,

- Communication
- Leadership
- Focusing on outcomes and connecting activities prioritising working group activity and making the most of opportunities arising from themed years
- Integrating the activities that are identified collaboratively with the priorities of those able to deliver 'on the ground'



In October 2016, the Strategic Historic Environment Forum (SHEF) approved changes to the delivery model. The key elements are:

- The Strategic Historic Environment Forum remains unchanged. The main functions of the Strategic Forum include:
- Championing Scotland's historic environment by providing strategic advice and direction on its management and promotion
- To ensure the cultural, social, environmental and economic value of our heritage continues to make a major contribution to the nation's wellbeing by delivering our shared vision for Scotland's historic environment
- To promote the Strategy by encouraging and celebrating collaboration and leadership at all levels across the sector
- To work in partnership on issues of national importance, aligning partners' activities and resources to deliver on agreed priorities for the historic environment.

The Delivery Model



- The Historic Environment Operational Group has been stood down and Historic Environment Scotland has become directly accountable to SHEF for coordinating, facilitating and enabling delivery across the Strategy working groups and for reporting on performance to SHEF.
- Historic Environment Scotland will convene a Chief Executives' Forum for the leaders of delivery partner organizations. This Forum will provide a mechanism for monitoring progress, addressing issues and concerns, identifying common threads and emerging themes, and ensuring momentum is maintained.
- The thematic working groups have been reconfigured. The Measuring Success Group has successfully concluded its work, and the Participation and Joint Local Authority and Central Government Groups have been stood down. Moving forward the thematic working groups will focus on 6 areas:
- Heritage Tourism
- Built Heritage Investment Planning
- Climate Change
- Volunteering
- Skills and expertise
- Local Authority Historic Environment

STRATEGIC HISTORIC ENVIRONMENT FORUM HISTORIC ENVIRONMENT SCOTLAND ÅRAINNEACHD EACHDRAIDHEIL ALBA

- The Historic Environment Outcomes Framework developed by the former Measuring Success working group will provide the platform for measuring the progress in delivering the Strategy's priorities.
- The annual planning and reporting year will be changed to run from April to March. As a consequence, this report spans the eighteen month period from October 2015 to March 2017

Strategic Working Groups

Heritage Tourism Group

The Heritage Tourism Group is charged with supporting the delivery of two national strategies: Tourism Scotland 2020 and Our Place in Time. The working group has been restructured and now comprises a core heritage tourism strategy group and three sub-groups.

The core strategy group consists of leads from Historic Environment Scotland, the National Trust for Scotland, the Historic Houses Association, the Scotlish Government and Visit Scotland and is charged with driving forward the key priorities of the group. The three sub-groups are looking at:

Intelligence - e.g. data and access

Product – e.g. itineries and heritage portals

Participation – e.g. leadership and engagement

The working group is delivering to an agreed Action Plan for 2015-18 with key activities focusing on the themed years, as this is now well embedded across the sector. Within this context the group has undertaken to promote collaborations, notably with cultural heritage and contemporary culture.

Over the period year the partners have focused collectively on:

- developing Year of History, Heritage and Archaeology 2017 activities, promoting collaborations such as the Jacobite Trail
- exploring how Visit Scotland's new website can host heritage tourism information
- exploring how the sector as a whole can take advantage of digital opportunities
- examining data regarding the Heritage Tourism sector's contribution to the economy
- working with Scottish Enterprise and other partners to encourage innovation in the sector

The group also organised a workshop conference, the People Make Heritage Workshop: Attracting More Visitors In 2017, on 16 March at Glasgow Caledonian University as part of Scottish Tourism Week.

The conference provided an opportunity to explore ways to grow visitor numbers in the Year of History, Heritage and Archaeology 2017 and to examine ways in which organisations can work together to invigorate the heritage tourism experience in Scotland, with a particular focus on film tourism, on use of new technologies, and on animating the heritage visitor experience.

Strategic Working Groups

Over the coming year, the group will focus on the continued implementation of the agreed action plan, particularly working together to facilitate a lasting and meaningful legacy from the Year of History, Heritage and Archaeology 2017 by consolidating upsurges in visitor numbers, income and enhanced partnership working for the future. They will also continue to consider how partners can best contribute to coordinated activity, including the ongoing funding of the Heritage Tourism Co-ordinator post which is due to come to an end later this year.

Steven Duncan, Chair, Heritage Tourism Group, Historic Environment Scotland

Built Heritage Investment Group

The establishment of a Built Heritage Investment Group is a direct response to the commitment in the Scottish Government's Programme to work with Historic Environment Scotland and partners to develop a long-term Infrastructure Investment Plan to restore, enhance and conserve Scotland's built heritage. Historic Environment Scotland will chair the working group tasked with taking this forward. It will be a collaborative exercise, with the sector working together to share knowledge, identify key issues, shape priorities, identify synergies, and test ideas.



Climate Change Group

In 2015, we reported on the temporary working group that had been established by SHEF consider how best to identify and address the challenges and opportunities provided by climate change.

In acknowledgement of the importance of climate change, the broad nature of our historic environment/cultural heritage sector and the range of potential areas of activity involved within the climate change agenda, a new Strategy working group is in the process of being established.

The work of the group will primarily reflect the lead provided by Scottish Government on climate change mitigation, adaptation and sustainability with the group focusing on a few activities at a time in order to maximise effectiveness and deliver tangible outputs.

In view of the identification of specific issues related to the existing building stock in the 2016 assessment of the Scottish Government's Scottish Climate Change Adaptation Programme (namely issues of disrepair, damp and condensation requiring more guidance on adaptation of the existing building stock) the group will initially focus activity in this area.

Subsequently in Jan 2017, the Scottish Government has also published its draft Climate Change Plan (Draft Third Report on Policies and Proposals) outlining policy actions on greenhouse gas emissions reduction and energy efficiency to 2032.

This document (albeit subject to consultation) requires very ambitious targets on both domestic and non-domestic sectors, and further underlines the need for the working group to focus activity in this area.

Strategic Working Groups

We are currently at the stage of assembling a group of members capable of assisting with delivery. In the meantime Historic Environment Scotland has, as part of its ongoing climate change work programme, completed a range of activities that will provide resources and which can be used to help deliver the objectives of the working group.

These include:

- new publications on *Climate Change Adaptation for Traditional Buildings* (Historic Environment Scotland Short Guide published October 2016) and *Damp in Traditional Gables* (Historic Environment Scotland INFORM Guide published March 2017);
- development of training materials and course content (with SQA qualification) in energy efficiency improvements for traditional buildings for a range of audiences from homeowners to professionals;
- a new Historic Environment Scotland *Carbon Management Plan* (March 2017) which provides a potential model for mainstreaming carbon reduction practices into heritage organisations.

In addition, the *Edinburgh Adapts Action Plan* was launched in Dec 2016, containing a series of actions relating to the historic built environment. This work has been coordinated by Adaptation Scotland with a number of partners, and it is proposed to work with this group to develop resources and outputs that can be applied elsewhere.

The next step is to approach a range of organisations who represent particular areas of the historic environment where delivery can be focussed and targeted towards specific audiences. These will includes organisations such as BEFS, Edinburgh World Heritage, Visit Scotland, the Church of Scotland, and Adaptation Scotland.

Ewan Hyslop, Climate Change, Historic Environment Scotland



Volunteering Group

The Volunteering Group pre-existed as a sub-group of the Participation Group and will build on the work of this former group. Chaired by Volunteer Scotland, it has representatives from Historic Environment Scotland, the Scottish Civic Trust, Museums Galleries Scotland, SCAPE, the National Trust for Scotland, Dig It 2017! and the University of Edinburgh.

The group will focus on demonstrating and promoting the value of volunteering to the sector and establishing mechanisms for individuals, communities and organisations to engage with the historic environment.

The group's work is to be informed by the findings of the Volunteer Scotland's research study, *Volunteering and the Historic Environment* that was published in June 2016.¹



Skills and Expertise Group

A strategic priority of *Our Place in Time* is to develop the skills and capacity needed to manage, nature and enjoy the historic environment across all our communities.

In response to this, SHEF commissioned an Audit of Skills Training Provision in Scotland in 2014-15 which was reported on in the first Annual Report.

The Skills and Expertise working group is still in the process of being established. Its purpose will be to work collaboratively with other organisations and groups from the public, private, and voluntary sector to identify the existing and future skills needs of the historic environment sector and develop initiatives that address those needs.

Local Authority Historic Environment Group

The Local Authority Historic Environment Group is the proposed successor to the earlier Local and National Joint Group on the Historic Environment. The working group is still to be established and remit agreed.

Mainstreaming the historic environment in the Scottish Government

The most significant policy field for mainstreaming activity was Community Empowerment, where asset transfer and community participation requests in particular offer considerable potential for improving local engagement around historic environment assets, as does community planning.

Early contact enabled Historic Environment Scotland to engage early with these areas, ensuring that the historic environment is well placed to respond to emerging new opportunities. Other evolving policy areas where contact was built or maintained include climate change (see above), land reform and planning.

In addition, preparatory work began, with input from the Forum and from Historic Environment Scotland, to collate information about UK and Scottish legislation and regulations of relevance to the historic environment which will be affected as a result of the United Kingdom Government's decision to leave the European Union. This work will continue, to support cross-government prioritisation of legislative action as UK Government legislative proposals emerge.

The Strategy Conference

The *Our Place in Time* Conference was held on 5 November 2015 in Dundee and was a great success. The day gave stakeholders the opportunity to both celebrate what we have achieved collectively under the new strategic framework for Scotland's historic environment as well as encouraging them to engage in debate about how we can best manage that resource going forward.



Historic Environment Scotland

Historic Environment Scotland assumed its full powers on 1 October 2015. In May 2016, Historic Environment Scotland launched its first Corporate Plan, For all our futures, that aligns the body's strategic priorities to the delivery of *Our Place in Time*, and welcomed its first permanent Chief Executive, Alex Paterson, in September 2016.

Historic Environment Scotland published its first progress report on the conservation and management of properties in care of Scottish Ministers in January 2017.

Historic Environment Scotland has a central role in leading and enabling delivery of the Strategy and, as a consequence, changes have been made to the delivery model. These have been reported above.

Measuring Success

The Measuring Success working group, led by the Built Environment Forum Scotland (BEFS), has concluded its excellent work with the publication of the first *Historic Environment Outcomes Framework*.

Developed in collaboration and consultation with representatives from many organisations in the sector, the framework comprises a set of highlevel outcomes and indicators across each of the priorities within the Strategy. In its final report, the Measuring Success working group recommended that:

 the framework provides a structure for sharing and reporting activities across the working groups

- the framework outcomes and indicators provide context for developing specific measures
- the framework should be able to identify what is working and what is not, and inform action planning
- the framework should not set targets since responsibility for delivery lies across many organisations, all with their own organisational priorities
- nor should the framework attempt to directly attribute a long-term outcome to any one activity or intervention, since there are so many interdependencies
- the framework offers potential for repurposing data and aligning data collection methods
- a collaborative approach to measurement offers opportunity to package research so that it can evaluate impact across multiple initiatives or audiences;
- there is considerable scope to improve how evidence is presented
- the ambition is for the framework to measure the impact that sector collectively makes in terms of the benefits it provides for communities



Looking ahead, the Framework will provide a basis for the introduction of the performance framework that will be used to demonstrate how the working groups and the historic environment are contributing to the wider purpose and national outcomes of the Scottish Government. It will also be used to support cross-sectoral decision-making, prioritisation and resource allocation as part of the wider delivery of the Strategy.

In recognition of the broader aspiration to record evidence of impact across the sector and in order to develop capacity in this area, BEFS hosted training delivered by Evaluation Support Scotland.

The training covered 'planning and evaluating work and linking local outcomes to national or higher level outcomes', as well as a further session on 'analysing and reporting on outcomes'.

The Measuring Success group was also active in shaping research commissioned by Historic Environment Scotland on volunteering and the brief for the Scottish Historic Environment Audit. The group responded to consultations on the Scottish Household Survey and the Royal Society of Arts 'Heritage Index'.

Finally, informed by stakeholder engagement undertaken by BEFS, the group put forward a recommendation to the Scottish Government to change the National Performance Indicator on the State of Scotland's Historic Environment from % A listed buildings at risk, to '% of pre-1919 buildings classified as being in a state of disrepair' (data derived from the Scottish Household Condition Survey).

The change was agreed, with the new measure published on the Scotland Performs website in late March 2017.

Scotland's Historic Environment Audit (SHEA) 2016

SHEA is an on-going project which draws on current robust data and research to provide, in one place, basic facts and figures that are of practical use for the sector in managing the historic environment.

SHEA also highlights gaps in our knowledge. The information in SHEA reports can be used by anyone with an interest in the historic environment.



The historic environment sector uses SHEA data to inform decisions on the management of the historic environment and the development of policy, strategy, planning and resource allocation

SHEA is published bi-annually and data is tracked through time to illustrate trends within the sector. SHEA 2016 is the fifth in the series and benefitted from advice from the Measuring Success working group.

Previous SHEA reports are available from historicenvironment.scot/shea.



The Archaeology Strategy

Launched in September 2015, the Archaeology Strategy² takes its lead from *Our Place in Time* and sets out a shared vision that Scotland's archaeology should benefit everyone in society.

The ethos behind the Archaeology Strategy is to make archaeology matter, ensuring that it plays a key role in our understanding of Scottish place-making and identity, enriching and improving the quality of people's lives.

The delivery of the Archaeology Strategy is led by the Scottish Strategic Archaeology Committee (SSAC), whose members represent different groups within the archaeological community in Scotland, including commercial, local authority and community archaeology as well as museums, professional institutions and others.

A 10 year delivery plan for the strategy was published in January 2016. The delivery plan is a living document which will change as the strategy is delivered and progress is made. It will be constantly monitored and reviewed.



² <u>http://archaeologystrategy.scot/files/2015/08/ScotlandsArchaeologyStrategy.pdf</u>

Themed Years

The Theme Years seek to galvanise partners into establishing a platform for visiting Scotland by collectively presenting an exciting and varied themed programme of events which really put Scotland on the international map.

They provide a particular focus for the work of the Heritage Tourism working group reported above.

While they focus on events programmes the theme years also provide an opportunity to mainstream thinking, to forge tourism partnerships, stimulate policy and strengthen partnerships.

Year of Innovation, Architecture and Design 2016

A wide range of events, activities and opportunities for engagement were delivered by historic environment organisations for the Year of Innovation, Architecture and Design 2016.

Highlights included the Festival of Architecture Scotland managed by the Royal Incorporation of Architects in Scotland that took place throughout 2016, with over 400 events and exhibitions across Scotland, Doors Open Day 2016, and the National Trust for Scotland's celebration of Greek Thomson at Holmwood House, Glasgow.

Year of History, Heritage and Archaeology 2017

The Year of History, Heritage and Archaeology 2017 provides a great opportunity to celebrate and showcase Scotland's unique historic environment and historic environment organisations have planned to deliver a wide variety of events and activities in the year.

Activities include Scotland's first Heritage Festival, History Live, the opening of the multi-million pound Engine Shed conservation hub in Stirling, Scotland in Six for World Heritage Day 2017, a Heritage Awareness Day on 6 October 2017, and Digit 2017!





Historic Environment Scotland Policy Statement 2016

The Historic Environment Scotland Policy Statement was launched in June 2016 and replaced the operational practices that were set out in the Scottish Historic Environment Policy (2011).

These practices changed as a result of the Historic Environment Scotland Act 2014, and the associated legislation and regulations.

It guides the operation of decision making in the Scottish planning system, sets out the principles under which Historic Environment Scotland operates and provides a framework that informs the day-to-day work of a range of organisations that have a role and interest in managing the historic environment.

The policy statement is a material consideration in the Scottish planning system and will also help guide and inform decision-making for local authorities and others.

Volunteering and the Historic Environment

In March 2016, Volunteer Scotland was commissioned by Historic Environment Scotland and BEFS to undertake research into volunteering in the historic environment in Scotland.



The primary objective of the research was to update the 2008 study on volunteering in Scotland's historic environment, which was also conducted by Volunteer Scotland.

The study involved a mix of desk-based review, consultation with key partners operating in the sector, and primary research using case studies and online survey.

Over 1000 public, private and third sector organisations operating in the historic environment sector were contacted to take part in the online survey and 182 responded, the majority (62%) from the third sector.

Published in May 2016, the *Volunteering in the Historic Environment* research report provides baseline statistics for number volunteers and contribution they make to the sector, as well as qualitative information on value of involving volunteers and the challenges to developing volunteer opportunities.



Landscape and the historic environment

Scotland's landscape has been shaped by both natural processes and human activity over thousands of years. This historical dimension contributes to the quality and character of the landscape and the cultural identity of Scotland.

In recognition of the important relationship between landscape and the historic environment, Scottish Natural Heritage (SNH) were formally commissioned in 2015 to establish a temporary working group to develop a common position on landscape and the historic environment.

A common statement has now been published. This statement sets out a vision for the historic environment dimension of landscape and how it can be better acknowledged and valued in policy and practice.

It is to be accompanied by an action plan that will be taken forward by Scottish Natural Heritage and Historic Environment Scotland in discussion with local authorities and others in the historic environment sector.

One early output will be refreshed guidance on local landscape designations prepared by SNH and Historic Environment Scotland, a draft of which was issued for consultation at the same time as the statement was published.

Pete Rawcliffe, Scottish Natural Heritage

Further Information

Further information on *Our Place in Time*, the Historic Environment strategy for Scotland can be found via the following links:

- Historic Environment Strategy: <u>www.gov.scot/Publications/2014/03/8522</u>
- Strategic Historic Environment Forum Webpages: <u>www.gov.scot/Topics/</u> <u>ArtsCultureSport/arts/Historic-environment/Strategy/Delivering-the-Strategy/</u> <u>StrategicForum</u>

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