



CONSERVATION PEER REVIEW
ARRANGEMENTS FOR THE PROPERTIES
IN THE CARE OF SCOTTISH MINISTERS
SEPTEMBER 2015



HISTORIC
ENVIRONMENT
SCOTLAND

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PURPOSE AND SCOPE

This document sets out the conservation peer review arrangements for the properties in the care of Scottish Ministers under the Scheme of Delegation.

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1.0 BACKGROUND

Peer review is the measurement of our approach, methods and output against the principles, standards and procedures that we set for our work. The peer review will be carried out by reviewers who have experience and competence in our area of work.

The benefits will be maintaining standards of quality, gaining from the experience of a wider group, improving performance and providing a credible independent assessment of our performance.

This peer review process will be a key element in providing assurance to Scottish Ministers under the Scheme of Delegation.

2.0 PURPOSE

Peer review offers an opportunity to:

- provide assurance to Scottish Ministers;
- benefit from the wider experience, knowledge and contacts of expert colleagues;
- improve our own practice and performance;
- improve quality and uphold standards;

encourage consistency in approach and methods

3.0 DELIVERY

3.1 Parameters

The peer reviewers will act as an advisory forum providing quality assurance to the HES Board by assessing and reporting on the quality of HES Estate based conservation activity. The reviewers will be invited to assess conservation activity against:

- the project objectives set by the Estates Unit;
- adherence to the conservation principles and technical standards set out by the Estates Unit and appended to the Scheme of Delegation;
- effective project management from setting objectives, through production information, completion of the programmed works on site, and efficient, safe construction management;
- the skills, expertise and training of our teams to ensure staff are equipped to deliver our duties.

Should the advisory group have other areas of relevant expertise then observation or advice in these areas will be welcome. From time to time, the Chair may request comments from the peer reviewers on other aspects of our operation – for example, strategic proposals for delivering conservation and maintenance of the estate or assessments of prioritisation.

The peer review group will be provided with the programme of conservation projects and invited to look at the conservation operations carried out in fulfilment of Scottish Ministers' commitments under the Ancient Monuments & Archaeological Act 1979 as transferred to HES under the Scheme of Delegation 2015 et seq. In essence, this means Ministers' obligations to conserve the core scheduled monument and provide visitor access. Activities under review will include knowledge, skills and expertise. Major Projects that have an element of conservation will also be in scope.

3.2 Expertise

Membership of the peer review group should reflect a range of interests within the following criteria:

- objectivity and interest in conservation of the estate;
- knowledge of conservation philosophy derived from international conservation charters;
- a practical perspective on the conservation needs of standing archaeology;
- knowledge of the technicalities of conservation and maintenance of monuments and historic sites;
- efficiency in construction management;
- an ability to assess the range of skills on display;
- management of a large and complex estate of comparable nature.

3.3 Appointment

Appointments will be overseen by the HES Board.

The pool that will meet the membership criteria is comparatively small and ideal candidates are likely to lie in other British Isles conservation organisations. These will include:

- English Heritage / Historic England
- CADW (Wales)
- National Trust (for England)
- Office of Public Works (Eire)
- National Trust for Scotland
- Accredited conservation professionals
- Academic technical experts
- Conservation trusts and societies.

It is anticipated that a standing membership will be around 8 members for a three year appointment.

3.4 Provision of information

The range of information made available to the Peer Review Group may change from project to project but should closely reflect the focus of each project assessment. It is likely to include:

- our conservation principles;
- scheme details including project objectives, programme, relevant costings, predicted MCU hours, instructed variations (with explanations);
- the technical standards relevant to the particular project;
- outcomes for costings, hours and programme;
- the internal Estates Unit assessment of project performance.
- pre-visit briefing packs;
- an accompanying host – regional Head of Conservation and / or delegated representative. The preference will be to direct the panel to the local team undertaking the project - District Architect, Works Managers etc;
- accommodation;
- transport;
- reviewers' expenses and reimbursements will be in line with HES Policy and managed through Corporate Affairs.

3.5 Reporting

Reviewers will be invited to comment on the delivery of the various operations that make up a conservation project and then propose improvements.

Analysis of the response will be aided by an ordered, pro-forma structure that is derived from the criteria in para 4 and the information in para 14 above.

The entries, paper or electronic, will be free text under these headings. A section for additional comments and recommendations would be required.

The review team could decide on a joint or individual submission. Submissions will be treated as confidential..

3.6 What are the logistics of review visit arrangements?

The review teams will be provided with:

3.7 How do we resolve differences between staff and the reviewers?

Estates Unit will see the comments in order to learn from the process. If there is fundamental difference of view or inaccuracies in the review, then the Head of Estates will submit a written response to the HES Peer Review sub-committee through the Director of Conservation.

3.8 Organisation

The peer review process will be overseen by a sub-committee of the HES Board and chaired by a member of the Board.

Typical Agenda:

- Apologies;
- Minutes of last meeting;
- Actions from last meeting;
- Feedback from recent visits;
- Programme for future visits;
- Presentation to Panel on relevant issues;
- Consideration of emerging strategic management issues;
- AOCB.

Membership includes:

the Chair (to be appointed by the HES Board from their membership);

the peer reviewers.

The following staff will be in attendance at meetings:

- Director of Conservation;
- Head of Estates;
- Head of Major Projects;
- Relevant HES Conservation staff on a invited basis.

Quorum = 4 reviewers.

Secretarial services will be provided by the Conservation Directorate. Travel and subsistence costs will be managed by Corporate Affairs.

An annual report on the peer review operations and finding will be submitted by the sub-committee to the full Board for approval and incorporated in the annual report on the properties in the care of Scottish Ministers to the HES Board and subsequently Scottish Ministers.

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