



**Asset management plan for the properties in the care of  
Scottish Ministers - interim statement.**

## **Purpose and Scope**

This document sets out interim arrangements for managing properties in the care of Scottish Ministers until a formal Estate Asset Management Plan is approved in 2016.

For further information please contact ;

Historic Environment Scotland  
Longmore House  
Edinburgh  
EH9 1SH

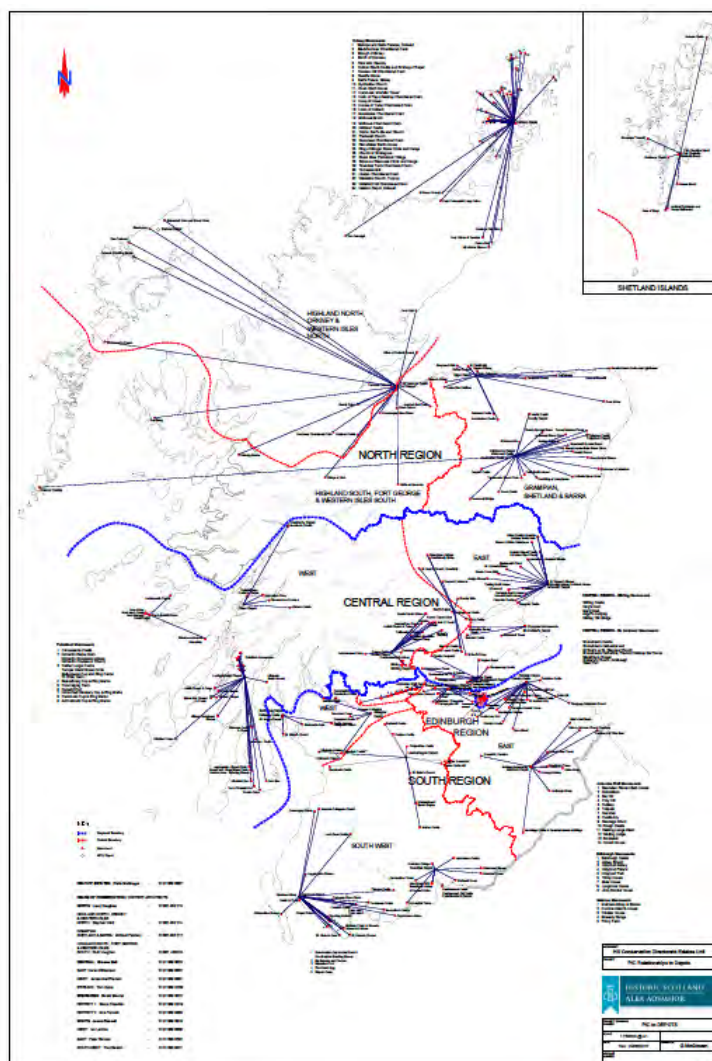


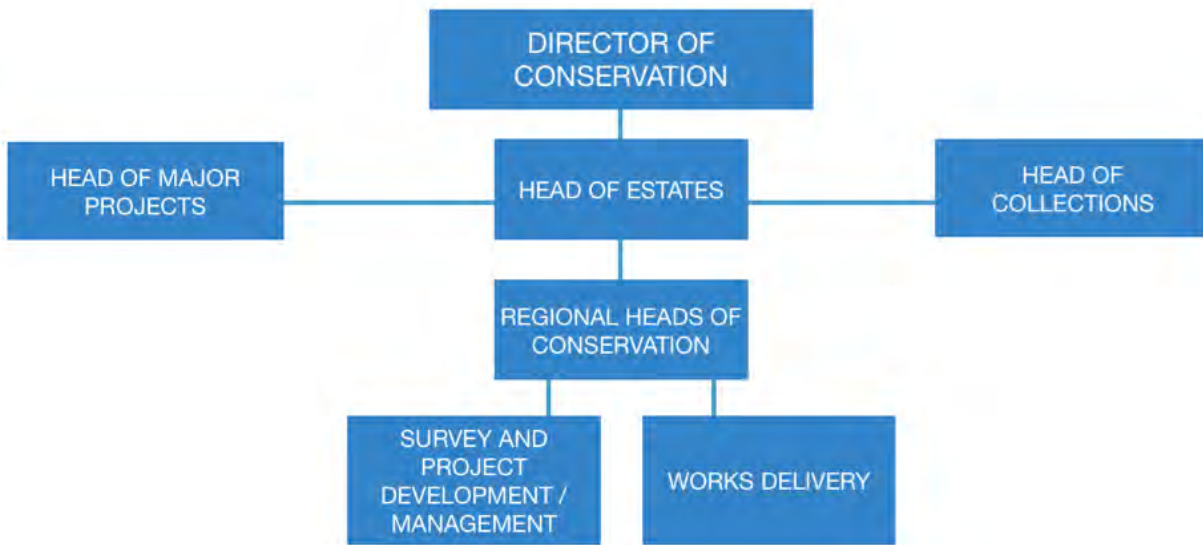
## 1.0 Background

A key output of the Estate Asset Management Programme (AMP) will be the first Asset Management Plan for the care of the properties in the care of Scottish Ministers and associated collections. The AMP will be published in the Spring of 2016. A significant volume of analysis and development have been undertaken prior to the Scheme of Delegation for the properties in the care of Scottish Ministers and associated collections being put in place in October 2015. This important piece of work will fundamentally change how we care for Minister's assets in terms of process, accountability and reporting. Until the AMP is published, the Scheme of Delegation requires us to account to Ministers how we shall fulfil the Policy objectives of the HES Act and provide assurance until the AMP is in place. This document sets out what the arrangements will be from October and the current resource position.

## 2.0 Standing Approach

Conservation Directorate manage the care, conservation and maintenance of the estate of Scottish Ministers and it's associated Collections. Conservation Directorate also undertake technical and scientific research, traditional skills and materials, climate change and technical education. A Head of Estates and Head of Collections report to the Director of Conservation and the Estates function is delivered currently on a regional basis comprising North, Edinburgh, South and Central. These regions are further split into Districts which are designed to spread the management of sites between 29 depots across the country.

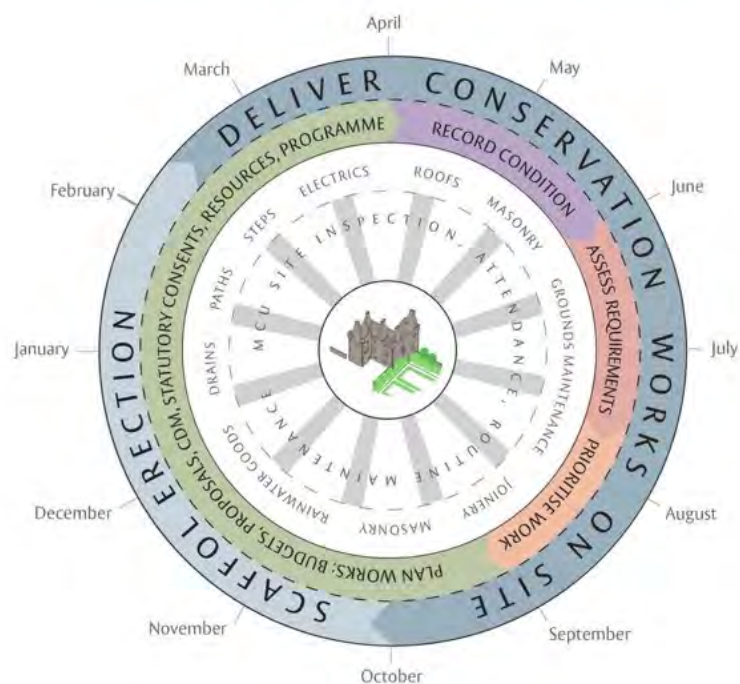




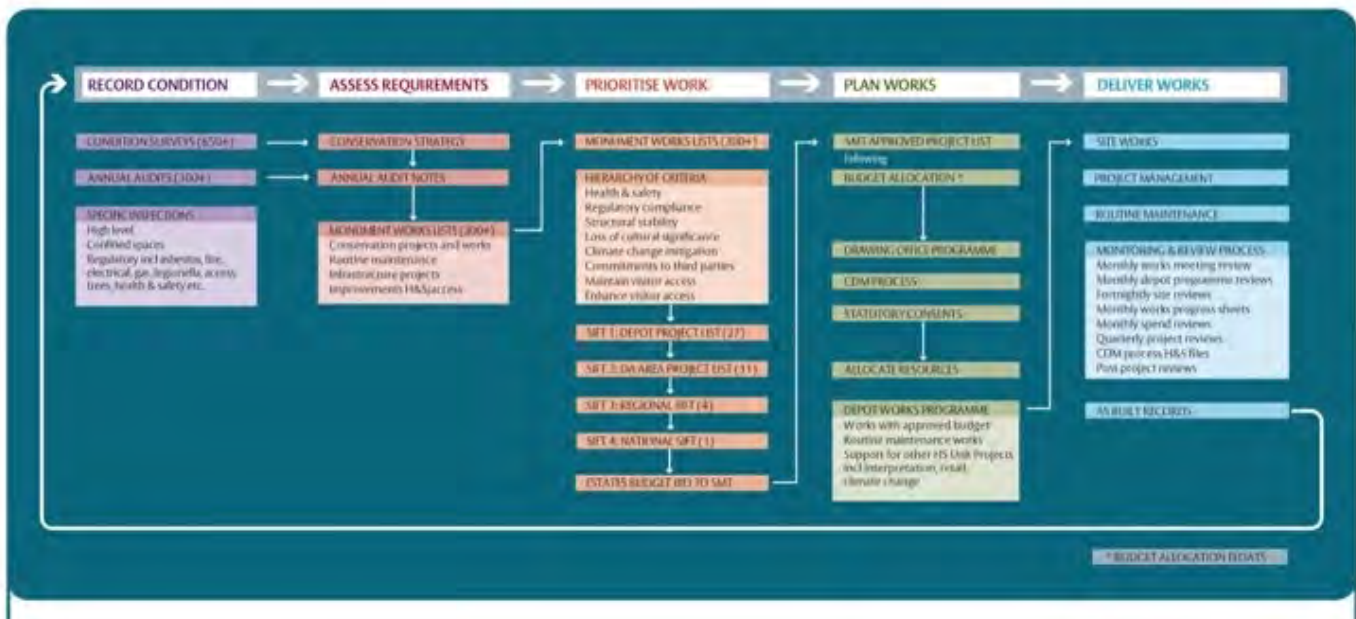
The Director of Conservation is a member of the Senior Management Team reporting to the Chief Executive. Historically a programme of reactive and planned works has been executed based on assessment of need generated through regular inspection cycles.

On an annual basis the life cycle of the monument can be illustrated as ;

TYPICAL ANNUAL LIFE CYCLE OF A MONUMENT



## ESTATES: CONSERVATION AND MAINTENANCE WORKS PROCESS



These inspections relate to the monument and its ongoing requirements. Low level maintenance tasks are managed at District level and resourced through our Monument Conservation Teams or out sourced to the private sector depending on the skills and expertise required and geographical location. More formal inspections generate work schedules which are prioritised at District, Region and eventually National level before being presented to the Director of Conservation by the Head of Estates. The Director makes a budget bid for 'baseline' or minor works against central Corporate reserves - operational budgets and also conservation and maintenance project funding.

In recent financial years a central emergency funding allocation has been established to respond to urgent demands arising on the estate which cannot be absorbed financially at a local level. Any residual funding in this allocation is released to prioritised projects based on need and what can be timeously delivered as the year progresses. Additional bids are made against Corporate reserves as funds are available in year against a prioritised list of projects. The nature of what projects can be delivered within a financial year changes as timescales and weather windows compress.

Detailed planning and technical preparation for works is required and no interventions can take place without the appropriate consents in place. From October 1st 2015 scheduled monument consent shall be required as Historic Environment Scotland does not have Crown exemption.

## 2.1 Resource allocation

Against the allocation made, the Director with his senior staff prioritise the initial and any subsequent allocation of resource based upon the following hierarchy ;



Priority is given to projects or activities which have health and safety implications at properties to staff or visitors and works required to ensure regulatory compliance is maintained. This might include repairs to historic fabric or non historic mechanical and electrical or other facilities management issues. Perpetuation of cultural significance follows in terms of priority then maintaining and improving access under the 1979 Ancient Monuments Act.

## 3.0 Transition Arrangements

The Scheme of Delegation has driven a programme of transformation relating to how the estate is managed driven by the need to be ;

- increasingly transparent
- able to account for resource allocation
- able to report on condition and interventions
- able to account on quality and standards
- provide quantifiable and measurable performance data

This has resulted in the creation of an entirely new approach to asset management. This means that the current period is one of transition as the new approach is implemented.

In general terms the management of the Estate will continue to follow established principles and procedures, transitioning to new arrangements under the Scheme of Delegation. Current operational and strategic policies remain in place until replaced.

#### **4.0 Arrangements for Financial Year 2015 / 16 - Investment Rationale**

Conservation made a bid over the initial 'baseline' allocation of £2.8M for what was considered 'urgent' items for FY 2015-16. There was an estates project allocation of £0.5M made and an additional £150,000 of cuts made in other Directorate activity to bolster the position. Demand for increased levels of resourcing have been largely met in recent years from Corporate Reserves and re-allocation of other Directorate funding. Resources have been re-allocated from our external facing technical activity and from last year our climate change investment work has effectively been halted. This has continued into this financial year.

We have allocated £589,000 against work items or other legal commitments and retained £68,300 as a centrally held emergency response fund. This allocation was prioritised using our allocation hierarchy model and has been fully assigned at 26th June. An additional allocation of £300,000 was made in September 2015 to bolster this position. Our priority continues to be the health and wellbeing of our staff and visitors and we shall continue to respond on that basis.

#### **5.0 Arrangements for Financial Year 2015/16 - Resource Focus**

We will continue to focus on delivery of planned works across the Estate.

The transition phase to the new asset management regime and completion of the Estates Asset Management Programme work streams are key deliverables for the current FY and require high levels of staff and resource engagement, particularly the Resource Needs Assessment which will consider how we will deliver our activity going forward. Further development of the Properties in Care Asset Management System to fulfil our Scheme of Delegation requirements and all other as all other aspects of corporate delivery.

Increasing pressure on fabric will require increasingly agile response to support our visitor facing and income generation work. An increased focus on site based safety issues will continue in relation to high level masonry failures in particular.