

# ANNUAL OPERATING PLAN 2017-18



HISTORIC  
ENVIRONMENT  
SCOTLAND

ÀRAINNEACHD  
EACHDRAIDHEIL  
ALBA





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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 over 5 million drawings, photographs and manuscripts
- are the largest operator of paid visitor attractions in Scotland with 71 sites operated commercially
- provide grants of over £14 million a year, stimulating regeneration, delivering benefits for communities, promoting sustainable economic 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 £430 million (direct) for Scotland's economy.**

The sites in our care generated an estimated £430 million for Scotland's economy in 2016 via tourism expenditure which 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 £730 million.



**We spent more than £32 million with Scottish suppliers and contractors in 2016**

supporting an estimated 530 full time equivalent jobs. Many of these contractors are SMEs (small to medium enterprises) and small specialist operators, concentrated in rural areas. This total includes 34 supplier companies who rely on HES for the majority of their income.



**We support an estimated 12,700 full time equivalent jobs (direct) in Scotland.**

The expenditure generated by sites in our care supported an estimated 12,700 full time equivalent jobs, which rises to 21,000 full time equivalent jobs including multiplier effects.



**Between 2006 and 2016 we awarded grants of more than £140 million that assisted repairs of over £591 million,**

evidencing the leverage that historic environment investment can deliver to benefit local communities.



We are a significant contributor to education, skills and wellbeing programmes. In 2016 **over 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 over **50 national and local partners** to engage with diverse audiences and deliver innovative and inspiring experiences. We supported **21 PhDs** in 2016.



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 around 4,000 requests for statutory advice and consents every year**.



We reduced our energy consumption by 4% in 2016, in our highest energy using sites, **saving 90 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

We operate in a complex and changing environment which is subject to the uncertainties of the current economic, political and constitutional climate.

Our commercial income is forecast to grow over the next three years due to the relative weakness of the pound and increasing footfall. Filming, such as Outlander, continued to provide a boost as many of the key locations are properties in our care. Scottish Government has allocated us £5.6 million of capital funding for 2017-18 to address core conservation needs and invest in visitor facing projects. This presents an opportunity to plan additional spend over multiple years.

We invested an additional £2 million in 2016-17 from the Scottish Government's economic stimulus fund to accelerate our conservation work, climate change adaptation and visitor facing investment. This has also enabled us to set the scene for future projects in 2017-18 and beyond.

We aim to build a strong and confident organisation with innovation and customer needs at its heart.

Digital transformation will change the ways in which we deliver our services, enabling more people than ever before to enjoy the benefits of the historic environment.

Tourism is a key sector in rural areas. As many properties in our care are in rural areas, these bring benefits to rural communities, by promoting the area.

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 access to our services for all.

We will step up our work with communities and local services across Scotland, improving places and wellbeing through our grants programmes, Community Empowerment support, role in the planning system and expert advice, training and guidance.

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 are committed to being a learning organisation - sharing our knowledge with others and learning from our customers, partners and stakeholders.

We are outward facing and forward looking and over the coming years we aim to strengthen our collaboration with the sector and beyond.

Our Corporate Plan For All Our Futures sets out our plans 2016-19:  
**historicenvironment.scot**

### **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



# OUR PLANS FOR 2017-18



This is the second Annual Operating Plan for Historic Environment Scotland. It describes what we aim to achieve in the second year of our Corporate Plan, building on 2016-17 and moving up a gear. 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

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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

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

## PROTECT

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We will enhance the protection of the historic environment through regulation, conservation, collection and investment.

## VALUE

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

## PERFORM

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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 2016, the historic environment contributed £2.3 billion to the Scottish economy by attracting tourism and through activity in the construction sector.

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## COMMITMENTS FOR 2017-18

### Realising the Value of Scotland's Historic Environment

As the lead public body for the historic environment in Scotland we will work with others to champion its value at home and abroad, including maximising the opportunities of the themed years, so securing wider benefits for Scotland.

#### During 2017-18, we will:

- **Build a lasting legacy from the Year of History, Heritage and Archaeology** by delivering and enabling education, outreach and events which will run throughout the year across Scotland. Our work will complement the work of everyone united in celebrating the historic environment and promoting its value, engaging new and diverse audiences to secure the future of Scotland's places.
- **Promote economic, social and community benefits** by ensuring that the historic environment adds social and economic value locally and nationally. We will work with others to deliver robust evidence-based advice and guidance which will help to shape development and catalyse delivery across diverse policy agendas including culture, tourism, planning, regeneration, climate change and economic growth.
- **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 ensure the Outstanding Universal Value of Scotland's World Heritage Sites is protected and sustained for the future. Our plans and actions will take account of the changing political and cultural landscape. We will explore our relationship with Europe and the challenges and opportunities of the UK's planned withdrawal from the European Union.

### 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 2017-18, we will:

- **Lead the delivery of Our Place in Time.** We will promote delivery of a unifying vision for the historic environment, galvanising the sector to deliver the values and objectives of the historic environment Strategy.

This will include enabling the new framework for delivery, including six priority groups reporting to Scotland's Historic Environment Forum (SHEF), chaired by the Cabinet Secretary – Built Heritage Investment, Climate Change, Heritage Tourism, Local Authority Historic Environment Forum, 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 which 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 2017-18, we will:

- **Lead the way in climate change mitigation, adaptation and sustainability** through researching, developing and disseminating a climate change impact methodology to meet the challenges of Scotland's changing climate.
- **Support the transition to a low carbon economy** by embarking on 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

Historic Environment Scotland has an important enabling role for communities including specific legislative responsibilities under the Community Empowerment Scotland Act (2015). We will help communities understand their rights and offer guidance as the lead public body for the historic environment in Scotland.

### During 2017-18, 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 ensuring the significance of the historic environment is recognised as a community priority. We will enable community management or use of local assets to help unlock the potential of buildings at risk through putting our knowledge and expertise at the disposal of local communities.
- **Help build community capacity** through developing productive relationships with Community Planning Partnerships and community groups to help to create better places for people to live, work and enjoy. We will publish policy and guidance on Asset Transfer Requests and on Participation Requests.





# 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.

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## COMMITMENTS FOR 2017-18

### 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 2017-18, we will:

- **Identify and record the historic environment and add to the National Record** 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 archaeology.** The sites, landscapes, collections and archives in Scotland provide a world-class research resource. Archaeology is one of the principal means of studying and understanding Scotland's historic environment (Source: Archaeology Strategy for Scotland).

## Building Scotland's National Record of the Historic Environment

Our extensive archive of over 5 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 2017-18, we will:

- **Improve the quality** of Scotland's National Record of the Historic Environment through making it more complete and reliable. We will establish the proportion of records that meet specific quality standards for Canmore.
- **Manage and develop the archives** - continue to develop strategic approaches to managing our archives through improving standards and accommodation. As the lead public body for the historic environment in Scotland we aspire to be recognised for our professional standards by seeking archive accreditation.
- **Explore storage and access options for our collections and archives** - explore 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 2017-18, 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, services and technologies to bring benefits to the historic environment and beyond.

## Improving Access to Information and Data

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

### During 2017-18, 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, improving our services and fuelling innovation. We will play our role in the delivery of Scotland's Historic Environment Data (SHED) Strategy which seeks to provide people with evidence for management, study and interpretation of the historic environment.
- Invest in further **digitisation** providing access to more of our archive and collections than ever before at the point of user need.



# Scotland's Urban Past

YOUR TOWN YOUR STREET YOUR STORY





# PROTECT



**What we do:** Enhance the protection of 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.

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## COMMITMENTS FOR 2017-18

### Managing Properties in our Care

As well as embodying a wealth of cultural significance, properties in 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 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 2017-18, we will:

- **Maintain Scotland's heritage assets in our care and their associated collections** 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 spend.
- **Report on the current and changing condition** of the PiCs in our annual Conservation Report.

## 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 2017-18, we will:

- **Lead the development of a Scotland-wide built heritage investment plan,** under the auspices of Our Place in Time, to first of all understand the investment needs of the historic built environment and then to ensure that a joined up approach is taken to prioritisation, targeting investment where it is most needed.
- **Invest through our own grants programmes a further £14.5 million in the historic environment** bringing benefits to the local economy and communities, bringing the total investment by the end of the Corporate Plan period to £43.5 million.
- **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 2017-18 we will:

- **Review our designations and consents policies.** Through the findings of “What’s Your Heritage” we will better understand the Scottish people’s priorities for the historic environment, what really matters to them and how change to designated sites and places should be managed. This will shape 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% of regulatory activities, consultations and decisions within required timescales and we will publish our decisions on the heritage portal [portal.historicenvironment.scot](http://portal.historicenvironment.scot). We will 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 2017-18 we will:

- **Open the Engine Shed**, Scotland's first dedicated building conservation centre in Stirling, and welcome our first students and interns. The Centre will encourage understanding of traditional building materials and skills among the public and professionals and raise standards in conservation for traditional buildings. We will offer formal and informal learning programmes and a public programme of events and activities to engage property owners and the general public in the conservation and protection of the historic environment. This multi-audience approach will raise awareness of the issues and challenges associated with, and the most effective means of protecting, the historic environment.
- **Develop a new and ambitious traditional skills programme.** We will work with Skills Development Scotland and key partners through the Our Place in Time Skills Group to develop a programme with high quality training outcomes which provides positive benefits for individuals, meets the needs of the historic environment and enhances Scotland's skills base. We will work in partnership with Forth Valley College and Stirling University to deliver courses leading to a post graduate qualification.
- **Enhance opportunities for apprentices to work across our activities** by maintaining our existing levels of apprenticeships and extending our programme to our commercial and tourism activities at Stirling and Urquhart Castles. This will bring 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.





# 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.

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## COMMITMENTS FOR 2017-18

### 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 Heritage Tourism Group which helps Scotland reach tourism growth targets by setting a strategic direction.

#### During 2017-18, we will:

- **Attract over 4 million visitors to the properties in our care** from Scotland and beyond through our marketing partnerships. We will deliver services to our 170,000 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 service provided at staffed sites, benchmarked against industry standards. We will roll-out public WiFi, improve our booking systems and deliver events programmes to bring Scotland's history to life.
- **Invest in the tourism infrastructure** to ensure that we maintain a network of high quality tourist destinations attracting visitors all across Scotland.

### 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 not currently engaged with heritage.

**During 2017-18, 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. We will support and develop local and national sustainable 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 work on over 50 partnership projects with diverse audiences across Scotland.
- **Develop an innovative new programme for young people at properties in our care to support the 2018 Year of Young People and its legacy.** We will work with new partners at both national and local level to develop a new youth focused strand to support young people not currently engaged with heritage. We will consult with young people directly to seek their views and opinions to inform development.

**Supporting and Enabling a Sense of Place**

Stories, traditions and sense of place are all a part of the historic environment. Using creative interpretation and dissemination we tell the stories which connect people to places and we work with communities enabling them to share their stories.

**During 2017-18, 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. We will support communities to share their stories and connect with places. Through the Scotland's Urban Past project, we will work with communities to make the stories of Scotland's places more accessible on the web.

### Promoting Heritage for All

We will engage and enthuse people from all walks of life by promoting access for all, and by diversifying our volunteering opportunities and increasing our social media audiences. Those who visited a historic site were over 50% more likely to report a high life satisfaction (Source: Scottish Household Survey). The properties in our care, located all around Scotland in a wide variety of landscapes and contexts, offer inspiring experiences for our visitors and our members.

#### During 2017-18 we will:

- **Improve access to heritage** by tackling social, intellectual, financial and physical barriers impacting on the ability or inclination of individuals to make the most of what the historic environment has to offer. We aim to make it easy for anyone who wants it, to engage with the historic environment. We will work with communities to open up access and reduce as many barriers as possible to participation in and enjoyment of the historic environment.
- **Develop new opportunities for volunteering** to maximise the reciprocal benefits for volunteers and organisations. The historic environment benefited from at least 17,100 volunteers in 2015 with an economic value of £14.7 million. We will build on this energy and enthusiasm by developing volunteering programmes across the range of our services to provide avenues for engaging disadvantaged groups and young people and provide routes and resources for practical advice and support, working with Volunteer Scotland.
- **Enhance digital access** through innovation and enhancing technological capability we will increasingly deliver access to our products and services through 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.

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## COMMITMENTS FOR 2017-18

### Enhancing our Customer Focus

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

#### During 2017-18, 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.
- **Develop our digital services** to provide our new and existing customers with enhanced access to our services, including through our website and other online channels.
- **Improve service quality** through preparing and publishing customer 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 2017-18, we will:

- **Build a strong, financially stable organisation** by investing in our commercial operations and exploring other fundraising opportunities. This will enable us to continue to invest in heritage, culture, education and environmental protection.

- **Implement our People Strategy** putting our staff at the core of our business. We aim to increase staff engagement and reduce average working days lost. We will work towards accreditations such as Investors in People and Healthy Working Lives, including a mental health awareness programme. We will create a resilient organisation with staff making the most of opportunities to develop and thrive.
- **Invest in technology** to improve the effectiveness and efficiency of our work. We will prepare and implement an IT Business Plan to direct our investment.
- **Grow trust and confidence** in Historic Environment Scotland through good governance, empowering leadership and proficient service delivery informed by enhanced policy and research capability and a focussed 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. Barriers faced by people with a protected characteristic, identified during the development of the Corporate Plan, were a lack of awareness of services and opportunities and a lack of confidence in accessing them.

#### During 2017-18, we will:

- **Publish our equalities outcomes and a mainstreaming report** which will set out the ways in which we will improve equalities outcomes across the range of our activities and a report which will provide details of our performance.
- **Improve engagement and participation**, remove barriers to access, widen our customer base, tailor our services and ensure that the historic environment makes a full contribution to the reduction of inequality in our society.
- **Fulfil our aspirations for Gaelic** by consulting on our Gaelic Language Plan 2018-23.

## Reducing Our Carbon 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 2017-18, we will:

- **Reduce our carbon emissions** in line with our Carbon Management Plan. As well as reducing our carbon footprint, the implementation of climate change actions will reduce our utility bills and provide better use of public resources.
- **Promote sustainable working** through delivering themed staff engagement initiatives to ensure that carbon emissions reduction is supported by long term culture change.
- **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, water consumption, action on biodiversity, sustainable procurement and adaptation.



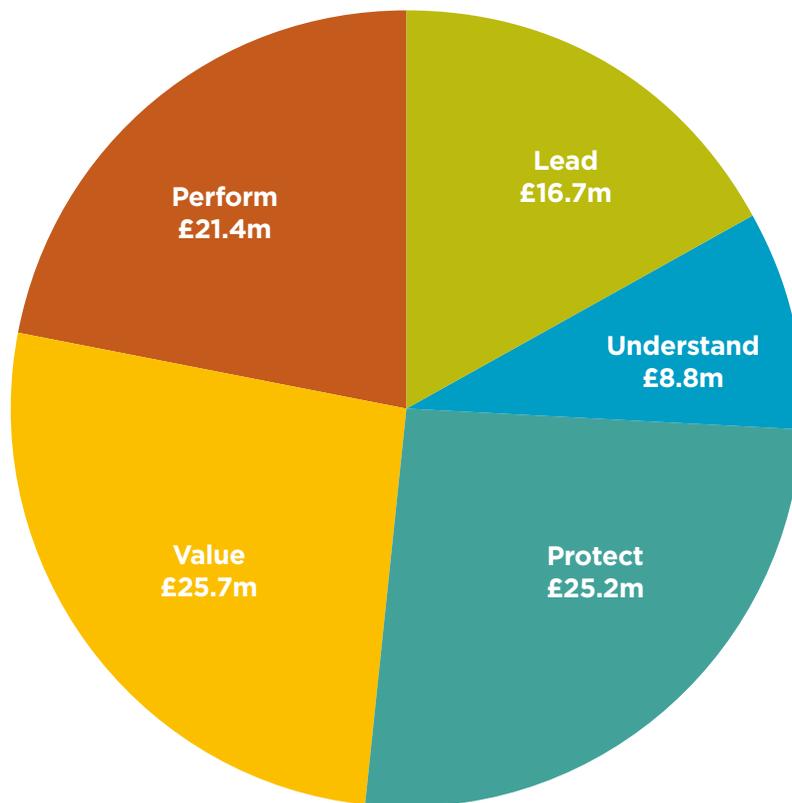
# OUR RESOURCES

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 fulfil our statutory obligations.

Our objective is to be transparent about how we allocate resources in pursuit of our outcomes.

**In 2017-18 we will have a total budget of £97.8 million.**

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



## Our Income and Expenditure for 2017-18

Income	£m	Expenditure	£m
Grant in Aid (unrestricted)	22.1	Staffing	40.7
Grant in Aid (restricted)	14.5	Running Costs	22.0
Capital	5.6	Cost of Sales	5.4
Capital Charges	3.3	Grants	14.7
Gross Commercial Income	49.0	Capital Charges	3.3
Other Income	3.3	Investment (revenue)	6.1
		Investment (capital)	5.6
<b>Total Income</b>	<b>97.8</b>	<b>Total Expenditure</b>	<b>97.8</b>

Note: The Corporate Plan Income and Expenditure projections for 2017-18 have been updated based on the Budget Bill and current forecasts.

## Our People

As at March 2017 we have 1,066 Full Time Equivalent (FTE) staff (57% male and 43% female). This figure does not include seasonal staff or vacancies. It will fluctuate during the year.

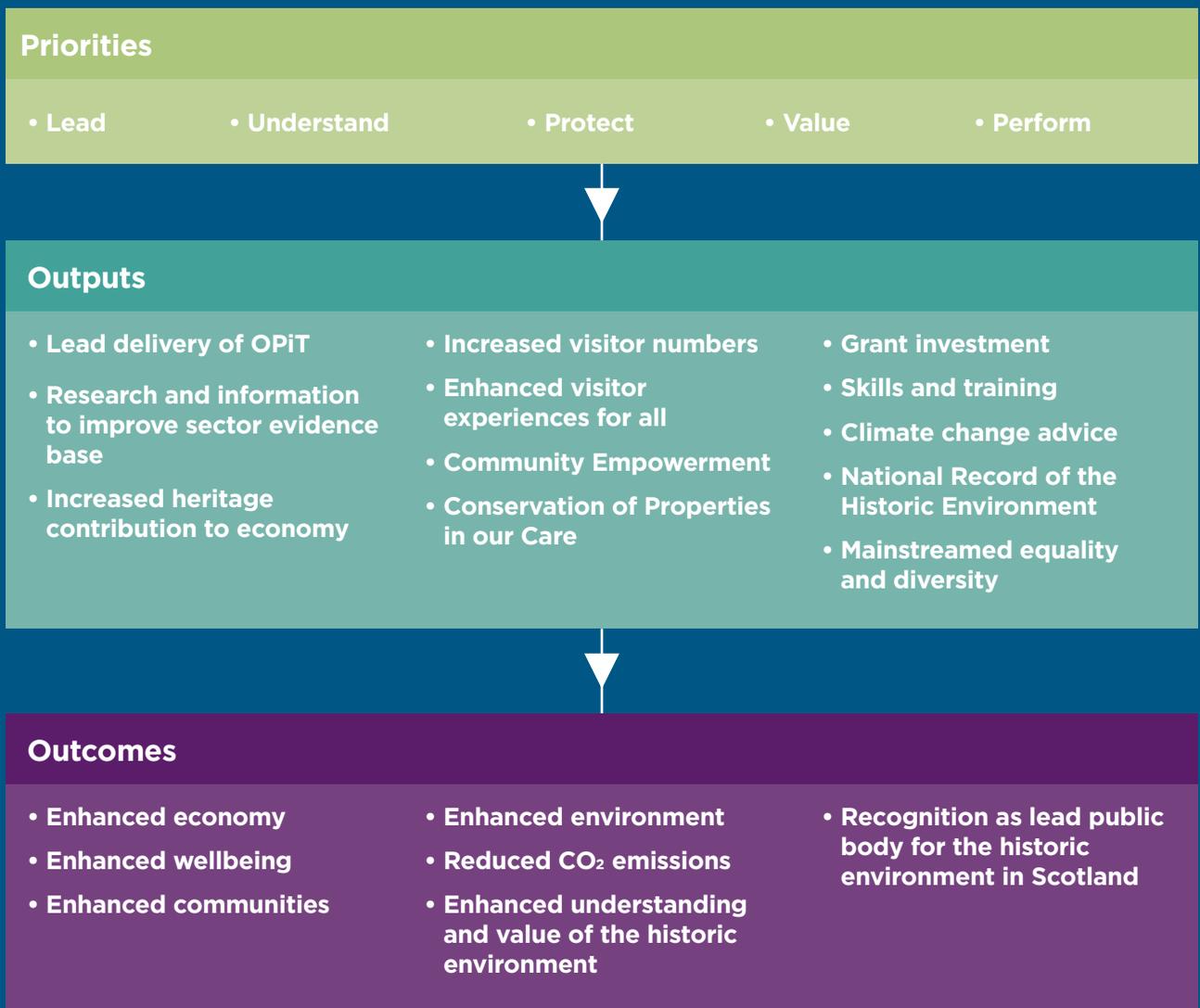
# OUR PARTNERS

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

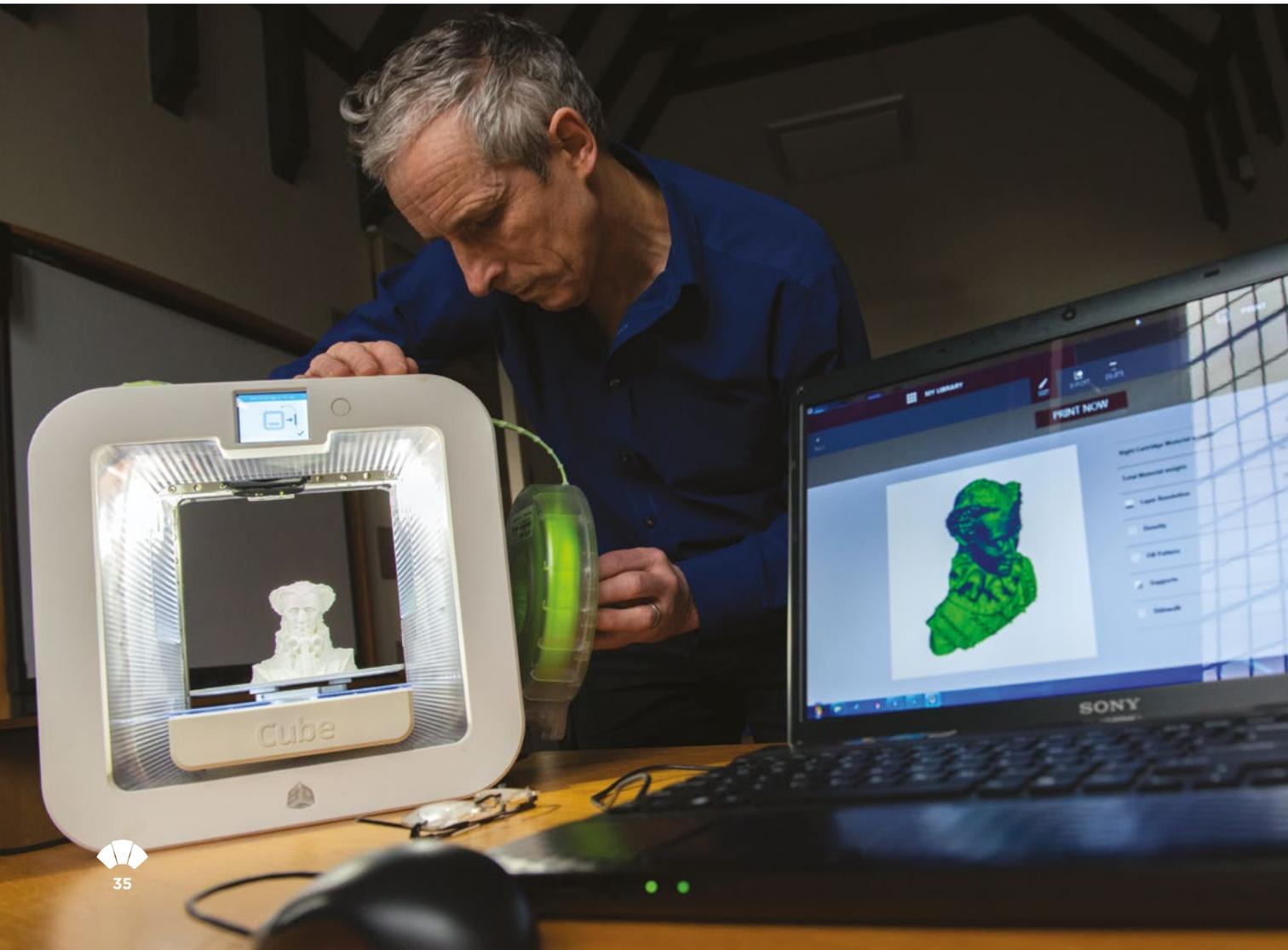
Our lead, do and enable activities deliver a range of impacts for the people of Scotland as illustrated in the chart below.



# 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 2017-18.

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.



Lead			
Corporate Plan KPI	Annual Operating Plan Commitment	Activities during 2017-18	Deliverables By March 2018 we will have:
Increased the contribution of heritage tourism to the Scottish economy	<b>Realising the Value of Scotland's Historic Environment</b>	Build a lasting legacy from the Year of History, Heritage and Archaeology	Delivered education, outreach, events and research to celebrate YHHA 2017, including for the first time: <ul style="list-style-type: none"> <li>• Heritage Awareness Day (6 Oct 2017)</li> <li>• Heritage Live (30 Sep - 1 Oct 2017)</li> </ul>
		Promote economic, social and community benefits	Increased HES's contribution to heritage tourism expenditure from £430m in 2016/17
		Promote Scotland around the world	Maintained and developed international networks and collaborations with ICOMOS, NARA, China - Forbidden City project and UNESCO (via Scottish Government and DCMS)
Championed the historic environment by taking the lead role in the delivery of Our Place in Time	<b>Collective Stewardship</b>	Lead the delivery of Our Place in Time	Published Annual Report on delivery of Our Place in Time to demonstrate the impact of the sector's collective activities
		Build capacity and resilience	<ul style="list-style-type: none"> <li>• Provided grants and training to build capacity across the sector</li> <li>• Worked with partners to deliver World Heritage Site Management Plan actions</li> </ul>
		Develop the evidence base	Published HES research findings
Managed the impact of climate change by improving knowledge and understanding	<b>Addressing the Impact of Climate Change</b>	Lead the way in climate change mitigation, adaptation and sustainability and supported the transition to a low carbon economy	<ul style="list-style-type: none"> <li>• Published Climate Change Annual Report to demonstrate the impact of our activities</li> <li>• Tested and disseminated a climate change impact methodology for the historic environment</li> </ul>
		Advise on adaptation	Published advice and delivered training on adaptation
	<b>Strengthening Communities</b>	Support community priorities and help build community capacity	<ul style="list-style-type: none"> <li>• Provided a "Resource for Communities" to help them access our support</li> <li>• Published guidance on the role of the historic environment in local communities and provided support to Community Planning Partnerships</li> <li>• Published guidance for community groups on the positive reuse of historic buildings, including advice on Right to Buy</li> <li>• Published final policy and guidance on Asset Transfer Requests and associated register of assets</li> <li>• Published policy and guidance on participation requests to HES for community groups</li> </ul>

Understand			
Corporate Plan KPI	Annual Operating Plan Commitment	Activities during 2017-18	Deliverables By March 2018 we will have:
Increased knowledge and understanding of the historic environment	<b>Researching and Investigating</b>	Identify and record the historic environment	Added new information to the National Record of the Historic Environment through programmes of field investigation, survey and recording
		Research	Undertaken, sponsored and supported research, including PhDs
		Secure greater understanding of the historic environment through archaeology	<ul style="list-style-type: none"> <li>Allocated grants for rescue archaeology and research through the Archaeology programme</li> <li>Worked with lead bodies in the sector to deliver Scotland's Archaeology Strategy</li> </ul>
	<b>Building Scotland's National Record of the Historic Environment</b>	Improve the quality of Scotland's National Record of the Historic Environment	Established the proportion (%) of Canmore records that meet specific quality standards
		Manage and develop the archives	<ul style="list-style-type: none"> <li>Revised and updated legal documentation for 30 deposited archival collections</li> <li>Submitted Archive Accreditation application</li> </ul>
		Explore storage and access options for our collection and archives	Concluded appraisal of collections and archive accommodation options
	<b>Sharing Knowledge</b>	Provide information on Scotland's places and how they have changed over time	Delivered publications, outreach and online services. For example maintained and updated the Historic Land-use Assessment dataset and monitored landscape change
		Promote innovation	<ul style="list-style-type: none"> <li>Undertaken applied research into and development of new surveying technologies and approaches in partnership with academic and other researchers</li> <li>Supported the implementation of the Culture and Business Fund, administered by Arts and Business Scotland</li> </ul>
	<b>Improving Access to Information and Data</b>	Improve access to data to unlock knowledge	Played our role in Scotland's Historic Environment Data (SHED) Strategy delivery
		Collection digitisation	Increased the number of collection items digitally accessible online by 50,000

Protect			
Corporate Plan KPI	Annual Operating Plan Commitment	Activities during 2017-18	Deliverables By March 2018 we will have:
Improved the condition of Scotland's historic environment	<b>Managing Properties in our Care</b>	Maintain Scotland's heritage assets in our care and their associated collections; and report on the current and changing condition of PiCs	<ul style="list-style-type: none"> <li>• Managed, repaired and maintained properties in our care in line with Schemes of Delegation</li> <li>• Published Annual Conservation Report which includes measures of condition</li> <li>• Delivered our Investment Plan</li> <li>• Achieved Museum Accreditation</li> </ul>
	<b>Investing in Scotland's Historic Environment</b>	Lead the development of a Scotland-wide built heritage investment plan	<ul style="list-style-type: none"> <li>• Chaired Our Place in Time Built Heritage Investment Working Group</li> <li>• Delivered a draft Scotland-wide Built Heritage Investment Plan</li> </ul>
		Invest through our own grants programme	Invested at least £14.5 million on historic environment grants
		Invest our time and expertise to enable others to protect the historic environment	Provided advice, guidance and training on technical conservation, grants and heritage management
	<b>Enabling Change in Scotland's Historic Environment</b>	Review our designation and consents policies	Analysed results of "What's Your Heritage", undertaken stakeholder review and consulted on any new or amended policy and guidance documents
		Ensure designation and consents-related activities are transparent and efficient	<ul style="list-style-type: none"> <li>• Dealt with 90% of regulatory activities, consultations and decisions within required timescales</li> <li>• Published annual Planning Performance Report</li> </ul>
	<b>Increasing the Quality and Availability of Skills</b>	Open the Engine Shed, Scotland's first dedicated building conservation centre in Stirling	Opened the Engine Shed to the public
		Develop a new and ambitious traditional skills programme	<ul style="list-style-type: none"> <li>• Worked with Skills Development Scotland to prepare a traditional skills programme</li> <li>• Worked in partnership with Forth Valley College and Stirling University to deliver postgraduate courses</li> </ul>
		Enhance opportunities for apprentices to work across HES activities	<ul style="list-style-type: none"> <li>• Provided a minimum of 24 craft modern apprenticeships across Conservation activities</li> <li>• Provided 5 Modern Apprenticeships across Commercial and Tourism activities</li> </ul>

Value				
Corporate Plan KPI	Annual Operating Plan Commitment	Activities during 2017-18	Deliverables By March 2018 we will have:	
Enhanced engagement with the historic environment	<b>Growing Tourism through our Attractions and Experiences</b>	Attract visitors to properties in our care	<ul style="list-style-type: none"> <li>• Attracted over 4 million visitors</li> <li>• Achieved 170,000 members at the high point of year</li> </ul>	
		Enhance visitor experiences	Achieved 92% of our staffed sites with a VisitScotland rating of 4 stars or above	
		Invest in the tourism infrastructure	Delivered a prioritised programme of investment in our visitor facing operations at properties in our care	
	Provided excellent service to our visitors and service users	<b>Delivering Education, Training and Learning</b>	Provide learning opportunities and reach out to new audiences and less engaged with groups	Delivered informal and formal learning programmes. For example: <ul style="list-style-type: none"> <li>• Provided 75,000 Free Education Visits</li> <li>• Provided 20,000 Travel Subsidies (school)</li> <li>• Worked on over 50 partnership projects with diverse audiences across Scotland</li> <li>• Delivered training sessions, talks and events associated with Scotland's Urban Past projects</li> </ul>
			Develop a programme for 2018 Year of Young People and its legacy	Prepared an innovative programme for young people at properties in our care to support Year of Young People 2018
		<b>Supporting and Enabling Sense of Place</b>	Shape and tell the story of Scotland and its places	Updated Statements of Significance for 30 properties in our care
Strengthen sense of place			Worked with communities to make the stories of Scotland's places more accessible on the web, through Scotland's Urban Past project	
	<b>Promoting Heritage for All</b>	Improve access to heritage	<ul style="list-style-type: none"> <li>• Reduced number of days sites are closed</li> <li>• Demonstrated that we have reduced barriers to accessing heritage</li> </ul>	
		Develop new opportunities for volunteering	<ul style="list-style-type: none"> <li>• Published our HES Volunteer Policy</li> <li>• Evaluated our Volunteer Development Pilot project and used findings to develop an Action Plan to grow volunteering</li> <li>• Worked in partnership with OPiT Volunteering Working Group and Heritage Voluntary Organisations (HVOS) to develop resources and deliver joint initiatives to promote and support volunteering, including a celebration of volunteers event for YHHA 2017</li> </ul>	
		Enhance digital access	Increased our social media audiences by 15%	

<b>Perform</b>			
<b>Corporate Plan KPI</b>	<b>Annual Operating Plan Commitment</b>	<b>Activities during 2017-18</b>	<b>Deliverables By March 2018 we will have:</b>
We are an efficient, resilient and sustainable organisation	<b>Enhancing our Customer Focus</b>	Deliver business improvement	Delivered 3% (£1.4m) annual efficiency savings in line with Scottish Government's Efficient Government Programme
		Develop our digital services	<ul style="list-style-type: none"> <li>Used audience feedback to improve our digital content and access</li> <li>Implemented our Digital Strategy</li> </ul>
		Improve service quality	Prepared and published customer service standards
Our staff are fully engaged in the transformation  Created an organisation that earns respect as the lead public body for the historic environment	<b>Building a Strong Organisation</b>	Build a strong, financially stable organisation	Generated income from PiC and commercial activities of at least £49m
		Implement our People Strategy	<ul style="list-style-type: none"> <li>Reviewed our resources to ensure alignment with future needs</li> <li>Developed and started to implement our Learning and Development Plan</li> <li>Implemented a Corporate Action Plan to support our staff engagement</li> <li>Reduced Average Working Days Lost (AWDL) to no more than 7.5</li> <li>Reduced Accident Incidence rate (per 1000 footfall) at sites by 5% compared to 2016-17</li> </ul>
		Invest in Technology	Prepared and delivered an IT Business Plan which directs our investment in technology
		Grow trust and confidence in HES	Developed and implemented an Action Plan to improve our corporate reputation measure (TRI*M index)
We actively promote equalities	<b>Promoting Equality</b>	Publish our equalities outcomes and a mainstreaming report aimed at improving engagement and participation	<ul style="list-style-type: none"> <li>Published Equality Outcomes and a Mainstreaming Report</li> <li>Prepared an action plan to widen our user base</li> </ul>
		Fulfil our aspirations for Gaelic	Consulted on our Gaelic Language Plan 2018-23
Reduced our Carbon emissions in line with our Carbon Management Plan	<b>Reducing our Carbon Emissions</b>	Reduce our carbon emissions	Reduced carbon emissions in line with our Carbon Management Plan, by 2.3%
		Promote sustainable working	Delivered themed staff engagement initiatives across the organisation e.g. The Big Energy Save switch-off campaign; Sustainable business travel campaign; Green Champions' Network
		Improve accountability and transparency	Published Annual Sustainability Report

## Scottish Government Objectives

Historic Environment Scotland supports the Scottish Government's Purpose of Sustainable Economic Growth, A Plan for Scotland: The Scottish Government's Programme for Scotland 2016-17 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.

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	*	*	*	*	*
<b>Wealthier &amp; Fairer</b>		<b>Smarter</b>	<b>Healthier</b>	<b>Safer &amp; Stronger</b>	<b>Greener</b>
<b>Scotland's Strategic Objectives</b>					



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

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