

Scotland's Historic Environment Forum (SHEF) Event Report

The Barracks, Stirling, 7 February 2024

INTRODUCTION

Hosted by Historic Environment Scotland and the Scottish Government, Scotland's Historic Environment Forum (SHEF) was held in person at The Barracks Conference Centre in Stirling. There were 80 attendees on the day from 72 organisations, who came together to discuss the future of the historic environment and recognise the importance of collective action to drive positive change (a full list of attending organisations is provided in **Annex A**).

As the first SHEF to be held following the publication of *Our Past, Our Future: the strategy for Scotland's historic environment* (OPOF), the focus of the event was on the delivery of the strategy. The half-day agenda included a plenary session with speakers and an interactive session on the development of the strategy's delivery framework.

EVENT OVERVIEW

Alex Paterson (Chief Executive, Historic Environment Scotland) began the proceedings with a short 'Welcome' address followed by Callum Grigor (Team Leader, Sponsorship and Historic Environment, Scottish Government) reading an Opening Address from **Christina McKelvie MSP**, Minister of Culture, Europe, and International Development, who was unfortunately unable to attend the event.

There followed four lightning talks, providing different perspectives on the opportunities and challenges facing the historic environment sector over the coming year. **Jilly Burns** (National Strategy Programme Manager, Historic Environment Scotland) then presented outline thinking on the draft delivery framework for OPOF and setting the context for the workshop session.

Workshop discussions explored the delivery of OPOF priorities, outcomes, and actions.

SHEF concluded with closing remarks from **Alison Turnbull** (Director of External Relations and Partnerships, HES) emphasising the importance of continued collaboration and collective action in achieving the objectives outlined in OPOF.

A recording of the talks is available at [Our Past Our Future - Delivery](#)

The full event programme can be found in **Annex B**.

SUMMARY OF SPEAKERS

Welcome

Alex Paterson (Chief Executive, HES) recapped the journey to the launch of the National Strategy in 2023. He emphasised the collaborative nature of the strategy, which was the result of extensive engagement and consultation across various organisations and interests.

Alex outlined the programme for the day, stressing the importance of turning the strategy into action while acknowledging the challenges facing the sector. He also noted the opportunities for leveraging the historic environment for economic growth, community development, the journey towards net zero and overall support of a better Scotland.

Opening Address by Ms Christina McKelvie MSP, Minister of Culture, Europe, and International Development (delivered in her absence by Callum Grigor (Team Leader, Sponsorship and Historic Environment, Scottish Government)).

Ms McKelvie reminded the audience of the connections between OPOF and national priorities as well as highlighting the importance of collective action.

Ms McKelvie spoke about the importance of the historic environment in shaping national identity and connecting people to their past and each other, as well as its contemporary relevance, noting its role in job creation, community enrichment, and contributing to a fairer and greener Scotland.

Ms McKelvie expressed gratitude for the collective effort demonstrated throughout the development of the strategy and noted the strong alignment between OPOF and other government frameworks and strategies. In noting the need for effective communication and collaboration to sustain the benefits of Scotland's heritage, Ms McKelvie called for continued engagement, cross-sector working and knowledge sharing from a broad range of organisations, individuals, and stakeholders to ensure successful delivery over the next five years. Ms McKelvie acknowledged the role of the Scottish Government in this delivery and noted the importance of collaboration within and between government departments.

Ms McKelvie's opening address concluded with an expression of gratitude for the commitment and support of the audience towards Scotland's heritage and the historic environment.

Plenary

Four lightning talks provided insights into national and regional trends, challenges, and opportunities in the historic environment sector:

Ailsa Macfarlane, Director, Built Environment Forum Scotland

Ailsa Macfarlane shared her insights into the wider policy landscape and implications for the historic environment, highlighting key legislation, strategies and policies of relevance to heritage and OPOF delivery.

Ailsa emphasised the importance of policy in and outside the sector and how it provides opportunities and challenges for the sector, stressing the need for strategic alignment and collaboration to maximise outcomes. Highlighted legislation included the proposed Wellbeing and Sustainable Development Bill, the Circular Economy Bill, the Human Rights Bill for Scotland, the Heat in Buildings Bill, the Agricultural and Rural Communities Bill, and the Visitor Levy (Scotland) Bill.

Ailsa also noted the importance of addressing the changes occurring within community land rights and ownership and the opportunities provided by the development of Scots and Gaelic language plans. She stressed the need for the sector to respond to the policy environment with a well-informed and coherent voice to guarantee that existing and historic buildings receive appropriate advice and interventions to make them sustainable for the future.

Ailsa concluded by emphasising the need for the historic environment to be embedded in government plans and for the sector to be advocating for mainstreaming heritage considerations across diverse policy areas, stressing the importance of supporting organisations and individuals in the sector to navigate that complex policy landscapes.

Bryan Dickson, Head of Building Conservation (Policy), The National Trust for Scotland

Bryan Dickson shared a perspective on sector skills, sharing an update on the outcomes emerging for the future Skills Investment Plan (SIP) and highlighting some of the high-level opportunities and key challenges related to sector skills.

Bryan began by discussing the importance of skills investment in sustaining the National Trust's charitable mission of preserving Scotland's heritage and highlighted its evolution of skills strategies and the significance of the SIP to that.

Bryan provided some of the headline findings from the SIP review, which recognised the SIP as a positive plan for the sector that raised the profile of sector issues, created a place for dialogue and collaboration and strengthened relationships between training providers, skills agencies and balanced with the needs of the sector.

The SIP review also highlighted some fundamental areas for future focus, including dedicated funding, the need for sectoral leadership and more effective engagement in delivery across local authorities, Scottish Government and small to medium enterprises. These findings have informed the SIP which will launch in April 2024.

Bryan concluded by emphasising the urgent need to address skills shortages to maintain and adapt Scotland's built environment in the context of climate change, highlighting the importance of SIP in helping to achieve a sustainable future.

Caroline Clark, Director, National Lottery Heritage Fund (Scotland) (NLHF)

Caroline Clark provided a broad overview of the funding landscape for 2024/2025 from the perspective of a major funder, highlighting opportunities for alignment with the OPOF national strategy.

Caroline began by noting some of the challenges which were impacting on the amount of money available to the sector, including the volatility and risk of the wider economic environment, the pandemic and legislative changes. This includes an exacerbated wider context of increased project costs and difficulties in fundraising. She shared some insights from the NLHF's funded portfolio, which demonstrated that an increased portion of their budget was now being spent on supporting projects already in delivery, leaving limited funds for new activities.

To address these issues, Caroline suggested how funders could potentially apply some of the principles within OPOF, including the focus on people at the heart of the strategy by enabling empathetic leadership, supporting a diverse workforce and fostering collaboration across sectors. She stressed the need for funders to adequately resource advocacy, communication, and leadership development, as well as the need to give greater revenue support alongside capital.

Caroline then shared the example of joint working with Nature Scot through the Facility for Investment Ready Nature Scotland programme which explored opportunities around decarbonisation and measuring carbon units, aiming to establish an ethical way of working with the community, focused on driving innovation in natural capital and green finance.

She concluded by stressing the importance of working together, keeping people at the forefront, and properly resourcing initiatives to achieve positive outcomes.

Dr Martin Valenti, Director of Net Zero, Nature & Entrepreneurship, South of Scotland Enterprise

Dr Martin Valenti discussed challenges and solutions to delivering net zero, from a regional economic development perspective.

Martin emphasised the need for collaboration and innovation to address some of the most significant challenges facing Scotland such as climate change, biodiversity loss, and social and economic decline. He advocated for placing a greater focus on cross-sectoral working and finding solutions rather than concentrating on negative experiences or apportioning blame. He encouraged the sector to embrace hope and take action to create positive change, highlighting the importance of trusting each other and being fearless in pursuing collective goals.

Martin concluded by urging the delegates to harness Scotland's history of innovation and creativity to tackle current challenges and to use their collective skills and potential to achieve progress.

Update on OPOF Delivery

Jilly Burns, National Strategy Programme Manager, Historic Environment Scotland introduced the new team responsible for implementing the OPOF strategy. She outlined initial thinking on the draft delivery framework before setting the context for the workshop session.

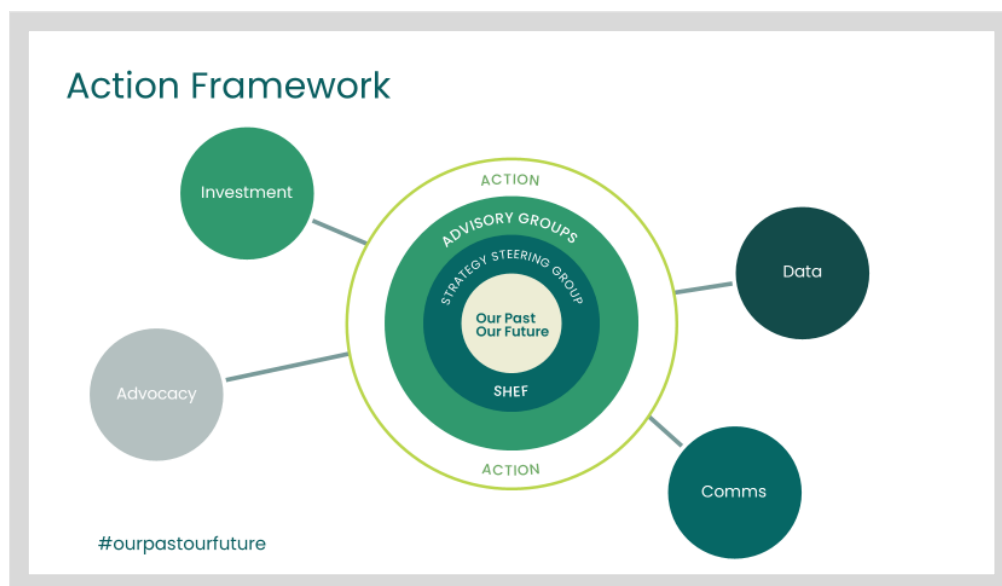
Jilly provided a brief recap of the strategy, including the three priorities: delivering the transition to net zero, empowering resilient and inclusive communities and places, and building a wellbeing economy. Jilly emphasised the strategy's mission of

sustaining and enhancing the benefits of Scotland's historic environment for people and communities now and into the future.

Jilly stressed the need for pragmatism, agility, and flexibility and outlined a delivery framework for translating the mission-oriented strategy into tangible action. She outlined principles of governance, collaboration, communication, investment, advocacy, data collection and the use of strategic action groups for the proposed delivery framework.

On governance, Jilly shared thinking in the diagram below, showing various levels of action and activity. This included:

- **National Strategy Programme Team** hosted by HES
- The annual **Scotland's Historic Environment Forum (SHEF)**
- A new **Strategy Steering Group** (see **Annex C**) that will provide direction and oversight for the implementation of the strategy.
- A series of **Strategic Advisory Groups**, starting with the suggestion of three new national groups for the three priority areas: Net Zero/Climate Action, Communities and the Wellbeing Economy. These groups would be short-term, and mission-focused, including sector and non-sector representatives with the purpose of quickly developing priority action lists in each area.



Jilly reflected that other groups could be commissioned over time if required and recognised that those groups which were successful under the previous strategy would continue, as they already align with OPOF e.g., Skills & Expertise, Make Your Mark, and the work of Scotland's Strategic Archaeology Committee.

Jilly outlined some potential activity strands for priority actions, including establishing new advisory groups. Some of the early actions for these groups would include data and evidence gathering, as well as auditing, refreshing and/or compiling critical advice.



Jilly also highlighted the need for action across cross-cutting strands including:

- **Investment:** funding adaptation, skills and community empowerment projects and deepening wider OPOF interests over time with strategic investment stakeholders
- **Advocacy:** for the historic environment sector across key national strategy/policy areas
- **Strengthened communications:** a shared and effective approach to communicating advice and support and communicating OPOF within and beyond the sector
- Implementing a **Data and Evidence** knowledge exchange network
- Implementing a **strong equality, diversity and inclusion approach** across OPOF

Jilly concluded by emphasising that the purpose of sharing proposals at this stage was to allow for input and feedback on the delivery framework in the workshop session.

WORKSHOP SESSION

The workshop session focused on OPOF priorities, outcomes, and actions. The objective was to gain a greater understanding of current activity aligned with OPOF and to gain insights to inform the further development of the Delivery Framework and forward delivery of the strategy.

The discussion was structured around addressing three main questions:

1. What were your **reflections on the direction of travel** as communicated in the Delivery Framework presentation (given by Jilly Burns)?
2. **What are you/your organisation already doing/planning to do** that will help to deliver/achieve the strategy mission, across the three strategy priority

areas?

3. What are the challenges/barriers to you/your organisation getting involved in or delivering against the activities and aspirations, and what are some of the solutions?



Groups discuss the workshop topics at Scotland's Historic Environment Forum on 7 February 2024 ©Historic Environment Scotland

The OPOF workshop facilitated a wider range of perspectives and insights, acknowledging challenges but fostering a collective spirit for innovative solutions and collaboration.

Stakeholders expressed optimism about the strategy's potential impact and agreed on the importance of collaboration, clear communication and placing people and communities at the centre of the strategy. The draft Delivery Framework received praise for its action-orientated approach.

Challenges were identified, particularly regarding achieving net-zero objectives and resourcing. Stakeholders emphasised the need for clear success measures, reporting accountability, the importance of streamlined metrics, and standardised data collection within a framework to balance preservation and development goals.

Inclusivity concerns were raised, highlighting the complexity of the language used. Calls were made for additional representation in governance and transparency in funding and advocacy-related matters.

An overarching theme was the need for continuous review and adaptation of plans to meet evolving needs and challenges. The feedback underscored the importance of the Delivery Framework being a pragmatic, agile, easily communicated roadmap capable of being used and championed by a wide range of stakeholders.

From workshop discussions, the OPOF Programme team recorded the following recommendations:

- Implement an agile approach to planning, delivery and reporting.
- Agreement to take forward the suggested Strategic Advisory Groups (e.g., Net Zero, Communities, Wellbeing Economy and Data & Evidence)

- Undertake an early review of OPOF priorities with the main strategic investment funders.
- Establish the OPOF website as a central point of communication for impact reporting, and learning (core advice, case studies and signposting).
- Review OPOF inclusivity approach and consider the addition of other voices/representation.
- Produce clear definitions for complex language used around OPOF activities.
- Map and establish an efficient communication approach with key stakeholders.
- Explore opportunities for academic research and private-sector investment in OPOF interests.
- Ensure transparency of the HES's role as both facilitator of the OPOF strategy and one of many stakeholders in the strategy.

NEXT STEPS AND CLOSING

Alison Turnbull, highlighted key points from the workshops, noting that a common thread through the discussions had been the strength of the strategy – both in its cross-sectoral approach and how the three priority areas identified connected and balanced each other.

Alison observed that the strategy resonates with people because of its positive tone and vision for the future. She encouraged attendees to harness this optimism and not to lose sight of the importance of action. A key action from the day would be to prioritise critical actions that would propel the sector forward.

She shared that to move forward, we need to explore the interconnectedness of OPOF, engage with key stakeholders, and share information and good practice, to expand the sector's reach by seeking out new groups and people to engage with.

Alison signposted information and encouraged delegates to follow progress on the dedicated [Our Past, Our Future](#) website.

CONCLUSION

This was the first SHEF to be held following the publication of OPOF and it provided a vital opportunity for stakeholders to contribute to the development of the Delivery Framework and show their commitment to the delivery of the strategy.

Further work will be undertaken on the Delivery Framework and Year 1 Baseline Report over the next few months under the oversight of the Strategy Steering Group. The updated Delivery Framework and Baseline Report will be published on the OPOF website: [Our Past, Our Future](#)

If you would like to discuss SHEF or the strategy further, please contact the National Strategy Programme Team directly at ourpastourfuture@hes.scot

ANNEX A – ORGANISATIONS ATTENDING SHEF

1. Aberdeen City Heritage Trust
2. Adaptation Scotland
3. Archaeology Scotland
4. Architectural Heritage Fund
5. Architectural Heritage Society of Scotland
6. Arts and Humanities Research Council
7. Association of Leading Visitor Attractions
8. Association of Local Government Archaeological Officers UK
9. Built Environment – Smarter Transformation
10. Built Environment Forum Scotland
11. Chartered Institute for Archaeologists
12. Children in Scotland
13. Church of Scotland
14. Coalition for Racial Equality and Rights
15. Community Enterprise Scotland
16. Community Land Scotland
17. Community Ownership Support Service
18. Creative Carbon Scotland
19. Creative Scotland
20. Culture and Business Scotland
21. Culture Counts
22. Dundee Historic Environment Trust
23. Edinburgh World Heritage
24. Fife Historic Buildings Trust
25. Glasgow Building Preservation Trust
26. Glasgow City Heritage Trust
27. Heritage Alliance
28. Heritage Trust Network
29. Highlands & Island Enterprise
30. Historic Churches Scotland
31. Historic Environment Scotland
32. Historic Houses Scotland
33. Historic Royal Palaces
34. Institute of Historic Building Conservation
35. Inverness City Heritage Trust
36. Keep Scotland Beautiful
37. Museums Galleries Scotland
38. National Churches Trust
39. National Library of Scotland
40. National Lottery Heritage Fund
41. National Museums of Scotland
42. National Museums Scotland
43. National Trust for Scotland
44. NatureScot
45. New Lanark Trust
46. Perth and Kinross Heritage Trust
47. Royal Incorporation of Architects
48. Royal Town Planning Institute
49. Scotland's Regeneration Forum
50. Scotland's Towns Partnership
51. Scotland's Churches Trust
52. Scottish Canals
53. Scottish Civic Trust
54. Scottish Community Heritage Alliance
55. Scottish Council on Archives
56. Scottish Federation of Housing Associations
57. Scottish Government
58. Scottish Historic Buildings Trust
59. Scottish Strategic Archaeology Committee
60. Scottish Traditional Building Forum
61. Skills Development Scotland
62. Society of Antiquaries of Scotland
63. South of Scotland Enterprise
64. Stirling City Heritage Trust
65. Sustainable Scotland Network
66. Sustrans
67. The SCAPE Trust
68. VisitScotland
69. Volunteer Scotland
70. War Memorials Trust
71. West of Scotland Regional Equity Council
72. William Grant Foundation

ANNEX B – EVENT PROGRAMME

- 9:30** *Event start* – Registration and networking, coffee served
- 10:00-10:05** *Introduction and housekeeping* – Alison Turnbull, Director, External Relations and Partnerships, HES, Robertson Conference Suite
- 10:05-10:10** *Welcome* – Alex Paterson, HES Chief Executive, Robertson Conference Suite
- 10:10-10:20** *Opening Address* – Christina McKelvie MSP, Minister of Culture, Europe and International Development, Robertson Conference Suite
- 10:20-10:50** *Four perspectives on the national context* –
- **Perspectives on the year ahead** – Ailsa Macfarlane, Director, Built Environment Forum Scotland
 - **Perspectives on skills** – Bryan Dickson, Head of Building Conservation (Policy), The National Trust for Scotland
 - **Perspectives on the funding landscape** – Caroline Clark, Director, National Lottery Heritage Fund (Scotland)
 - **Regional perspectives** – Dr Martin Valenti, Director of Net Zero, Nature & Entrepreneurship, South of Scotland Enterprise
- 10:50-11:10** *Delivering the National Strategy – Update on the Draft Delivery Framework* – Jilly Burns, National Strategy Programme Manager, Robertson Conference Suite
- 11:10-11:25** *Break and coffee* – served in McNeil and MacPhail Rooms
- 11:25-12:45** *Workshop* - Facilitator-led group discussions on delivering *Our Past Our Future* priorities, outcomes and actions, McNeil, MacPhail and Stevenson rooms
- 12:45-13:00** *Next steps and closing remarks* – Alison Turnbull, Robertson Conference Suite
- 13:00-14:00** *Lunch* – Lunch is served and networking, Robertson Conference Suite and McNeil Room
- 14:00-14:30** *Tour of Engine Shed*

ANNEX C – STRATEGY STEERING GROUP

Purpose and remit

The purpose of the Steering Group is to provide direction and oversight for the implementation of the strategy at national, regional and local level.

The group will:

- Provide strategic direction and guidance to the National Strategy Programme Team and, through them, to the action groups that exist to deliver the strategy
- Ensure effective coordination of strategy delivery and monitor its progress
- Identify challenges or obstacles to delivery and propose solutions
- Foster collaboration between delivery partners and stakeholders
- Promote the strategy and help to communicate and advocate its success.
- Advise on any adjustments and improvements to strategy implementation as needed.
- Attend the annual Scotland’s Historic Environment Forum meetings

Membership

Membership will comprise invited senior leaders from a broad range of delivery partners, representing a diversity of interests and perspectives from the historic environment, other relevant sectors, and communities that are essential to the successful delivery of the strategy at national, regional and local level.

- Historic Environment Scotland
- Built Environment Forum Scotland
- National Trust for Scotland
- National Lottery Heritage Fund
- Museums Galleries Scotland
- COSLA
- Archaeology Scotland
- Heritage Trust Network
- Historic Houses Scotland
- VisitScotland
- Skills Development Scotland
- South of Scotland Enterprise
- Highlands & Island Enterprise
- Young Scot
- Diversity Scotland
- Scottish Government - Net Zero Directorate
- Scottish Government – Culture and Major Events Directorate