

Action Plan 2008-2011

Scotland's Historic Environment Audit

Know the past. Build the future

Introduction

This action plan covers a three year period 2008 to 2011.

Its purpose is to articulate, to our stakeholders, how we intend to deliver statistical indicators and research for the historic environment, which have been identified as priorities through the audit process.

The main focus will be to provide information that is of practical use for the sector in managing the historic environment.

Background

Following a report from HEACS¹, Ministers instructed Historic Scotland to take forward an audit of the historic environment in phases by gathering available information, presenting it on a website and identifying gaps in the evidence base.

In 2007, Historic Scotland published a report, which met these requirements. "A review of existing information for Scotland's historic environment audit" is available from www.heritageaudit.org.uk.

This action plan takes us forward from that point, setting out what and how we intend to deliver over the next three years.

¹ Report and recommendations on the need for a heritage audit in Scotland and how to take it forward, Historic Environment Advisory Council for Scotland, 2004.

Our priorities

This first report identified a number of gaps in our knowledge about the historic environment. We worked with our advisory group² to agree the best way of filling these gaps and to identify priorities. We agreed that:

- the audit process would focus on addressing those questions which can be answered by reporting fairly straightforward counts of information; and that
- complex questions can only be answered by more sophisticated assessment and will best be elucidated through research.

By way of scene setting, this action plan highlights some possible areas for research; but, as explained below, these research workstreams will not be pursued as part of the ongoing audit process but via a separate programme of research.

During the life of this audit action plan, we will:

- Build on the work done for the first audit report to develop a set of indicators to show how the state of the historic environment is changing over time (Annex 1). It is intended that these indicators will be particularly useful to the sector in managing the historic environment. We will periodically review these indicators for their continued relevance.
- Identify indicators that can be periodically populated from robust national datasets. We will also gather local authority level data where this can be sourced from nationally consistent datasets and within the terms of the Concordat between Scottish Government and COSLA.

² Historic Environment Audit Stakeholder Advisory Group (HEASAG)

- Develop and implement robust arrangements for sharing data with partners.
- Gather baseline data for the agreed indicators during 2008/9 and publish it on our website during 2009.
- Gather repeat data for the agreed indicators every three years. The next report, comprising commentary and trend analysis and will therefore be published in 2011.
- Maintain and develop the audit website (www.heritageaudit.org.uk) as a vehicle suitable for presenting statistical data about the historic environment.
- Develop suitable methods to measure the condition of our historic environment. As a priority, we will focus on listed buildings, scheduled monuments and conservation areas.
- Develop a suitable format for an audit statistical bulletin and report measures, with limited commentary on a three year cycle.
- By way of illustration, the main gaps include a lack of robust information on:
 - employment and investment in the historic environment;
 - the economic benefits of the historic environment;
 - the availability and need for traditional skills and materials;
 - take up and participation in education and learning;
 - marine heritage; and
 - public attitudes to heritage.
- These new research activities will be undertaken independently of the audit process, although some of the outputs may include indicators that will be used in future audit reports.
- Priorities and resources for these research projects will be allocated through Historic Scotland's corporate research programme, in liaison with the sector as appropriate.
- The research activities discussed above are those specifically identified through the audit process. They do not represent a comprehensive list of research requirements for the historic environment. For example, the list does not specifically mention subjects such as energy efficiency of listed buildings, climate change, and sustainability. A comprehensive list of research needs will be generated through Historic Scotland's corporate research programme.

Through our separate research activity, we will:

- Deliver ongoing research to undertake a survey of local authority policies, staffing and resources for the historic environment.
- Make use of the findings of the study of the economic impact of the historic environment in Scotland.
- Undertake new research to fill the gaps in the evidence base, identified by the audit process.

Feedback

Historic Scotland would be very happy to receive any comments on this action plan. They should be sent to heritage.audit@scotland.gsi.gov.uk

Indicators for Scotland's Historic Environment Audit

- Where possible we will gather the following straightforward data counts with a baseline of 2008, and every three years thereafter. Trend analysis of these data will be published in 2011. We will periodically review these indicators to ensure their continued relevance.
- The more complex questions about the historic environment will be prioritised through Historic Scotland's corporate research programme.

Theme A: Identification, designation and condition of the historic environment

Subject	Ref	Headline Indicator	Source
A1 Overview of the historic environment	A1.1	Number of RCAHMS records (of known sites): <ul style="list-style-type: none"> • maritime records • archaeology records • architectural records 	RCAHMS
	A1.2	Number of Notices to Record (NTRs) sent to RCAHMS (in year)	RCAHMS
	A1.3	Extent of Historic Land-use Assessment (HLA) (% of Scotland covered)	HS RCAHMS
	A1.4	Number of SMR/HER records	RCAHMS
	A1.5	Number of pre-1919 dwellings	CSHCS
A2 Designated assets	A2.1	<ul style="list-style-type: none"> • Number of cultural World Heritage Sites (designated by UNESCO) • Number of cultural WHS sites on tentative list 	HS
	A2.2	Number of Properties in Care	HS
	A2.3	<ul style="list-style-type: none"> • Number of scheduled monuments • Number of parishes considered under strategic scheduling programme (which began in 2005) 	HS
	A2.4	<ul style="list-style-type: none"> • Number of listing entries • Number and percentage in: <ul style="list-style-type: none"> Category A Category B Category C 	HS
	A2.5	Number of sites on the Inventory of Gardens and Designed Landscapes	HS
	A2.6	<ul style="list-style-type: none"> • Number of Designated Wreck Sites • Number of scheduled wrecks (below Mean Low Water) 	HS
	A2.7	<ul style="list-style-type: none"> • Number of conservation areas Possibly: <ul style="list-style-type: none"> • Extent of conservation areas • Number of households in conservations areas 	LAs To explore feasibility of gathering using GIS
	A2.8	<ul style="list-style-type: none"> • Number of National Parks • Extent of National Parks (Hectares) • Percentage of Scotland covered by NPs 	SNH
	A2.9	<ul style="list-style-type: none"> • Number of National Scenic Areas • Extent of National Scenic Areas (Hectares) • Percentage of Scotland covered by NSAs 	SNH

Subject	Ref	Headline Indicator	Source
A3 Other assets and landscapes	A3.1	Number of historic battlefields: <ul style="list-style-type: none"> • On the proposed inventory • On other battlefield site records, such as local HERs or other lists 	HS HERs, local lists
A4 Condition of and risk to listed buildings	A4.1	Percentage of A-listed buildings on Buildings at Risk Register (BARR)	To be available from mid 2009 from SCT
	A4.2	Percentage of listed buildings removed from BARR through positive action	To agree terms of reference with SCT
	A4.3	Number (and %) of listed BAR assessed as being in the following condition: <ul style="list-style-type: none"> • Good • Fair • Poor • Very poor • Ruinous • Unknown 	Coverage of BARR is being improved. To be available from mid 2009 from SCT.
	A4.4	Number (and %) of listed BAR assessed as being in the following category of 'risk': <ul style="list-style-type: none"> • Critical • High • Moderate • Low • Minimal • Unknown 	Coverage of BARR is being improved. To be available from mid 2009 from SCT.
	A4.5	<ul style="list-style-type: none"> • Number of listed buildings demolished • Number of unlisted buildings in conservation areas demolished 	To explore what can be gathered from LAs consents records
	A4.6	Number of reported fires in A-listed buildings	National Fire Database – funded by HS/RCAHMS
A5 Condition of and risk to scheduled monuments	A5.1	Number (and %) of scheduled monuments assessed as being in the following condition: <ul style="list-style-type: none"> • Optimal • Generally satisfactory but with minor localised problems • Generally satisfactory but with significant localised problems • Generally unsatisfactory with major localised problems • Extensive significant problems 	HS Monument Warden Records
	A5.2	Number (and %) of scheduled monuments assessed as having the following risk of future deterioration in condition: <ul style="list-style-type: none"> • Minimal – no factors present to alter stable condition of monument • Slight – intervention may be desirable in the long term but monument stable currently • Medium – deterioration likely within five years • High – deterioration likely within one year • Immediate – ongoing deterioration in condition of monument 	HS Monument Warden Records
Condition of other HE Assets	There are no available, robust and nationally consistent approaches to assessing the condition/risk of other HE assets. Over the next 3 years, we will explore the feasibility of developing indicators for the condition of and risk to other HE assets.		

Subject	Ref	Headline Indicator	Source
Theme B: Managing and resourcing the historic environment			
B1 Planning applications and consents	B1.1	Planning Applications <ul style="list-style-type: none"> • Number of planning applications decided by LAs • Number of planning applications affecting: <ul style="list-style-type: none"> • Listed buildings • Scheduled monuments • Gardens and designed landscapes • Other HE • Number (and %) of planning consents with archaeological conditions 	SG Planning LAs From LA Staffing and Resources survey (commissioned by HS)
	B1.2	Listed Building Consent/Conservation Area Consent <ul style="list-style-type: none"> • Number of LBC/CAC applications decided by LAs • Number of LBC/CAC applications granted by LAs • Percentage of LBC/CAC cases resolved by HS within 28 days (target 97%) • Number of LBC/CAC cases determined by LAs within 8 weeks 	SG Planning LAs and HS
	B1.3	Scheduled Monument Consent (SMC) <ul style="list-style-type: none"> • Number of SMC applications received by HS • Number of these applications refused by HS • Percentage of SMC applications resolved by HS within 9 weeks (target 80%) 	HS
B2 Management plans	B2.1	Current management plans and inspection regimes (number and %): <ul style="list-style-type: none"> • World Heritage Sites with a management plan • PICs with a condition assessment (in last 5 years) • Scheduled monuments (scheduled for 5+ years) with a Monument Warden Record in place • Scheduled monuments on Forestry Commission land with a Forest Enterprise Monument Management Plan in place • Forestry Commission land covered by Forest Design Plans • NTS properties with Management Plans/ Property Statements • National Parks with a management plan with specific policies relating to the historic environment* • NSAs with a Management Strategy with specific policies relating to the historic environment* 	Relevant organisations: HS, Forest Enterprise, NTS, NPs, SNH *if possible, we will identify if separate policies available for LBs, SMS, other HE
	B2.2	Percentage of Conservation Areas with: <ul style="list-style-type: none"> • Article 4 Directions in place • Conservation Area Appraisals (CAAs) in place • Conservation Area Management Plans 	LAs
	B2.3	<ul style="list-style-type: none"> • Percentage of Local/Structure Plans with specific policies relating to the historic environment • Local landscape designations with specific policies relating to the historic environment 	Derive from a review of LA plans
B3 Other management indicators	B3.1	<ul style="list-style-type: none"> • Number of Designated Wreck Site licences issued by Historic Scotland 	HS
	B3.2	SRDP – To explore suitable measures from T2 and T3	SRDP

Subject	Ref	Headline Indicator	Source
B4 Public Sector Employment	B4.1	Number of (full time equivalent) staff employed by: <ul style="list-style-type: none"> • Historic Scotland • NTS (permanent staff) • NTS (seasonal staff) • RCAHMS 	HS, NTS and RCAHMS
	B4.2	Local Authority Staffing <ul style="list-style-type: none"> - Number of local planning authority staff involved in the historic environment - Number of archaeology officers - Number of conservation officers - Number of LAs with archaeologists - Number of LAs with conservation officers <p>These measures to be refined once research is published in Autumn 2008</p>	From LA Staffing and Resources survey (commissioned by HS)
Voluntary Sector and Private Sector Employment	There are no readily available, nationally consistent and robust methods to identify the number of people employed in the HE by the private sector or by the voluntary sector (other than by NTS). Sample surveys could be used to estimate numbers employed by these sectors. The need for this work will be prioritised in due course by HS corporate research programme.		
B5 Accreditation	B5.1	Number of professionals who are represented by/accredited by: <ul style="list-style-type: none"> • Professional Accreditation of Conservator-Restorers (PACR) • Architects Accredited in Building Conservation (AABC) • Institute of Field Archaeologists (IFA) • Institute of Historic Building Conservation (IHBC) • Conservation Accreditation for Registered Engineers (CARE) • Royal Incorporation of Architects in Scotland (Accreditation in Conservation Architecture) (RIAS) • Royal Institution of Chartered Surveyors (Building Conservation Accredited Members) (RICS) • Chartered Institute of Architectural Technologists (on the Conservation Register) (CIAT) 	Relevant Organisations: RIAS, RICS, ICON, AABC, IFA, CIAT, IHBC and ICE
B6 Investment in HE Note- that grants can cover more than 1 year. So, need to avoid double counting over years.	B6.1	Historic Scotland (total expenditure) <i>Of which:</i> <ul style="list-style-type: none"> - Protection – external built heritage - Protection – Properties in Care 	HS
	B6.2	Heritage Lottery Fund (grants awarded for HE projects in Scotland) <ul style="list-style-type: none"> - Number of awards - Total value of awards 	HLF
	B6.3	RCAHMS expenditure Figure includes grants from other agencies. So, double counts grants from other agencies. Further work needed to address this.	RCAHMS

Subject	Ref	Headline Indicator	Source
	B6.4	Local Authority expenditure This measure to be refined once research is published in Autumn 2008	LA Staffing and Resources survey (commissioned by HS)
	B6.5	National Trust Scotland (total expenditure) Figure includes grants from other agencies. So, double counts grants from other agencies. Further work needed to address this.	NTS
	It is not straightforward to measure the level of investment from the voluntary sector (other than NTS) and from the private sector. Investment in HE would need to be explored as a research topic. The need for this work will be prioritised in due course by HS corporate research programme.		
	B6.6	Area-based regeneration and conservation funding: <ul style="list-style-type: none"> • Number of Town Schemes in operation • Total funding allocated to Town Schemes <ul style="list-style-type: none"> - from Historic Scotland - from local authorities • Number of Townscape Heritage Initiatives approved (since 1998 when scheme began) • Total awards to THIs (since 1998 when scheme began) • Number of Conservation Area Regeneration Schemes (CARS) approved (since 2005 when scheme began) • Total funding awarded through CARS (since 2005 when scheme began) 	HS HLF LAs
	B6.7	<ul style="list-style-type: none"> • RIAS Architecture Awards, Saltire Conservation Awards • TCRE investment in training and partnership funding 	The suitability of these measures will be explored during the lifespan of this action plan

Subject	Ref	Headline Indicator	Source
Theme C: Benefits of the Historic Environment			
C1 Education and lifelong learning	C1.1	<ul style="list-style-type: none"> Number of recorded school visits to historic sites School visits to historic sites as a percentage of all school visits reported for the year 	VisitScotland
	C1.2	Number of candidates for History: <ul style="list-style-type: none"> Higher level Intermediate level Standard Grade level 	To explore data available from SQA
	C1.3	<ul style="list-style-type: none"> Number of higher education students studying courses related to the historic environment Number of construction Modern Apprenticeships 	HESA and SE DG Education
C2 Visitor numbers	C2.1	<ul style="list-style-type: none"> Number of recorded visits to historic visitor attractions Visits to historic sites as a percentage of all recorded visits in year Average adult admission charges (HE attractions) Average total spent by visitor (at HE attractions) <p>HHAS suggested that we explore the feasibility of developing indicators for:</p> <ul style="list-style-type: none"> Revenue gained from stays in historic properties Number of overnight tourist stays in historic properties 	Visit Scotland To explore feasibility of developing this indicator
	C2.2	Number of recorded visitors in year to: <ul style="list-style-type: none"> Historic Scotland's 75 admission-charging properties NTS properties HHAS properties RCAHMS archives 	HS, NTS, HHAS and RCAHMS
	C2.3	Number (and%) of properties/sites open to the public in year: <ul style="list-style-type: none"> Historic Scotland National Trust for Scotland HHAS Forestry Commission Scotland 	HS, NTS and HHAS
	C2.4	AIGAO suggested that LAs could provide the number of: <ul style="list-style-type: none"> LA run heritage events Visitors to LA run heritage events LA run HE sites Visitors to HE sites 	To explore what is easily available from LAs
	Other economic benefits	The benefits of the HE extends beyond the tourism sector. It is not straightforward to measure the wider economic value of the historic environment. Further research would be needed to explore this subject. The need for this work will be prioritised by HS corporate research programme, in due course.	

Subject	Ref	Headline Indicator	Source
C3 Membership and participation	C3.1	<p>Number of members/friends of National organisations:</p> <ul style="list-style-type: none"> • Historic Scotland (HS) • National Trust for Scotland (NTS) • Archaeology Scotland (AS) • Young Archaeologists Club (YAC) • Association of Local Government Archaeology Officers (ALGAO:Scotland) • Architectural Heritage Society Scotland (AHSS) • Society of Antiquaries of Scotland (SAS) • Garden History Society in Scotland (GHSS) • Society for the Protection of Ancient Buildings in Scotland (SPAB) • Built Environment Scotland Forum (BEFS) • Scottish Industrial Heritage Society (SIHS) • Nautical Archaeology Society (NAS) <ul style="list-style-type: none"> • Historic Houses Association for Scotland (HHAS) (friends – single) • Historic Houses Association for Scotland (HHAS) (friends - households) • Historic Houses Association for Scotland (HHAS) (number of member properties) 	Member organisations
	C3.2	Number of adopt a monument scheme projects in place	CSA
	C3.3	<p>Doors Open Days:</p> <ul style="list-style-type: none"> • number of sites participating • number of visitors • number of volunteers 	SCT
	C3.4	<p>Scottish Archaeology Month:</p> <ul style="list-style-type: none"> • number of opportunities to participate • number of visitors • number of volunteers 	CSA
	C3.5	<p>Results from a sample of local archaeology initiatives will be reported, as follows:</p> <ul style="list-style-type: none"> • Highland Archaeology Fortnight <ul style="list-style-type: none"> - number of visitors - number of events - % of visitors rating satisfaction as good/superb • Perthshire Archaeology Month <ul style="list-style-type: none"> - number of visitors - number of events - % of visitors rating speakers and guides as excellent / good - % of visitors rating content of events as excellent / good - % of visitors rating standard of events as excellent / good - % of visitors rating organisation of events as excellent / good 	<p>Highland Council Archaeology Service</p> <p>Perth & Kinross Heritage Trust</p>
	C3.6	Number of visits to Historic Scotland free weekend	HS
	C3.7	<p>We have not developed one single indicator on use of HE online databases. By way of illustration we will report:</p> <ul style="list-style-type: none"> • Number of visits to PASTMAP (in year) 	RCAHMS

Subject	Ref	Headline Indicator	Source
C5 Volunteering	C5.1	<p>It is not possible to include all volunteering initiatives across the HE sector. By way of illustration we will report the following examples of volunteering initiatives:</p> <ul style="list-style-type: none"> • National Trust for Scotland (number of volunteers) • National Trust for Scotland (number of hours) • Junior Palace Guides (pool) • Shorewatch • Scotland's Rural Past Project 	<p>NTS Junior Palace Guides Shorewatch Scotland's Rural Past</p>
Attitudes to the historic environment	<p>There are no readily available, nationally consistent and robust data available that can be used for an indicator of public attitudes to the historic environment. Sample surveys could be used to gather attitudes periodically. The need for this work will be prioritised by HS corporate research programme.</p>		