

Conservation Bulletin, Issue 12, October 1990

Corporate Plan insert from between pages 10 and 11

CORPORATE PLAN 1990–94

THIS SHORTENED VERSION of the full Corporate Plan summarises the main points of our plan for 1990–94, including the financial picture.

THE CORPORATE PLAN sets out English Heritage's planning process. It shows how, in the short to medium term, our aims are to be translated into working objectives and targeted programmes. It looks ahead to 1991–92 in some detail and to the later plan years, 1992–93 and 1993–94 in broader outline. It also sets out longer term aims where this is useful.

ORGANISATIONAL GROUPINGS

Until July 1990 English Heritage operated as two main operational groups with a third support group. From 1 July a new fourth group, Technical Services group was set up. This new arrangement will be reflected in next year's Corporate Plan.

The Conservation group deals with our advisory work, grant assistance and other involvement in the national stock of historical buildings and areas and ancient monuments. Its work falls into four categories.

Protection of the historic environment – listed buildings, ancient monuments, and historic areas.

Advice and assistance – grants and advice are given to a wide range of owners.

Advice to government, as the government's expert adviser on matters affecting the historic built environment.

Research, publication, and records – programmes of research and publication and maintenance of our vital records.

THE ROLE, CORPORATE AIMS AND OBJECTIVES OF ENGLISH HERITAGE

The role of English Heritage is to bring about the long term conservation and widespread understanding and enjoyment of the historic environment for the benefit of present and future generations using expert advice, education, example, persuasion, intervention and financial support.

Our aims are:

1. to work with the public, private and voluntary sectors to increase resources for and commitment to conserving the historic environment;
2. to ensure the flexible and responsible use of resources, taking account of long-term conservation priorities;
3. to secure the best possible protection, care and use of the historic environment, and to ensure recording in cases of unavoidable loss;
4. to establish high standards based on our own research and practical experience, and that of others, and to uphold those standards in our judgements and in the example we give;
5. to give independent, authoritative information, advice and assistance reflecting the standards we have set;
6. to help people to enjoy and understand the historic environment, and to see the need to protect it;

7. to be open, responsive and fair in all our dealings;
8. to attract and keep the best staff for the job and provide appropriate training and development to promote their effectiveness and job satisfaction;
9. to manage our resources effectively, efficiently and economically.

The key corporate objectives for English Heritage for the Corporate Plan period unchanged from the last plan are:

1. To carry out work to improve our knowledge and understanding of the state of the historic environment in England in order to be able to assess more precisely the need for action.
2. To decide on changes relating to the structure of the organisation to improve its overall effectiveness and efficiency.
3. To have produced a Properties in Care estate which is well repaired, efficiently managed and continues to earn an increasing percentage of total costs and which makes maximum use of external resources.
4. To improve general understanding of the role we are playing in protecting the historic environment, particularly by informing people better what our aims and objectives are and what significant steps we take towards achieving them.

The Properties in Care group maintains and opens to the public the monuments which are in our direct care. Its work falls into four categories:

Repair and conservation of the monuments – all repair and conservation, plus associated archaeological research, recording and publication.

Recurrent maintenance and estate management – broadly, projects (other than monument repair) aimed at keeping our large and dispersed estate in good condition and meeting our responsibilities as a major landowner.

Provision of visitor and education facilities – providing facilities at the monuments to meet our educational, presentation and marketing remits.

Provision of professional services and advice – specialist professional and technical services to both operational groups and to people outside English Heritage.

The Central Services group provides administrative and financial support to these two groups. Its work falls into two categories:

Accommodation and office services; information technology; personnel services; finance; internal audit.

Secretariat and related services; legal services; press and public relations; central planning unit; reorganisation and relocation unit.

THE STATE OF THE HISTORIC ENVIRONMENT

The 1989 Corporate Plan emphasised two needs: to define the historic environment as clearly as possible and to use the information we gather to assess the overall need for resources to care for that environment. We continue to tackle these issues by improving and extending the bases of existing definitions and by including assessment of need studies in projects within other programmes wherever we can. Dedicated surveys are beyond our financial and manpower resources. We may need to explore ways of accelerating this work, at the expense of other activity, if emerging results indicate significant new problem areas. For the present we consider existing programmes adequate in scope.

However, short term funding creates problems; for example, our PES settlement for 1989–90 provided for the first time extra funding for our needs assessment work, up to £0.35m in 1990–91 and £0.2m in 1991–92 plus funding for the listing review which includes needs assessment work. We can therefore press on with these programmes up to 1992 but have no security thereafter.

Assessment of need: Our 1989 Corporate Plan made clear the importance of needs assessment in attaining our aims and objectives. It is, and will remain, beyond our means to survey fully and accurately the national historic environment to assess total need. We are instead employing a series of other exercises already in progress to which we can profitably and economically add an element of need assessment work. For example, the Monuments Protection Programme enables us to carry out a check on monument condition as part of the compiling process, as does the listing resurvey. This will enable us to build up the information we require on needs assessment, though it is slower and less comprehensive than a dedicated survey would be. The means we are using are:

Buildings at Risk register and surveys: These are specifically designed to survey and assess nationwide the numbers and types of historic buildings where urgent action is needed to avoid real risk of loss.

Monuments Protection Programme: This major reassessment of the national stock of scheduled monuments will include some information on condition. It is a long task and at best will be complete by the end of the decade.

Listing review: This has been extended to include all 379 seriously inadequate lists and should protect all historic buildings under the normal criteria for listing, greatly reduce the number of spot-listing referrals and make planning more certain – though listing can never be definitively completed.

Churches: We are launching research into the overall need for repair to the country's historic churches and other places of worship. For Anglican churches this will be based on the existing system of church quinquennial reports.

The condition of our own estate: Our priorities for the estate remain the same, giving first priority to safeguarding the monuments in our care and then developing our trading activities. We have a much clearer picture of our estate's overall condition and needs than of the national historic environment generally. We are making good progress towards putting it into a satisfactory condition of repair and maintenance but the speed at which we reach this objective is governed by physical, manpower and financial resource constraints.

Provision of grants: We must also assess the need for grants and review whether our grant schemes are effective and target the grants to the right areas.

Ten year forward look: How do we plan for the needs of the historic environment in the longer term? It is difficult to look ten years ahead and as our information base grows through needs assessment our ten year forward perspective may change. On the basis of present information we see the following long-term matters as needing action:

Churches: there is extra provision of £3.0m from 1990–91 for repairs to churches. We are launching research into the overall need for repair to the country's historic churches; we know the extra provision, though welcome, will not be enough. The rate at which churches continue to be declared redundant may accelerate; throughout the next ten years achieving the repair and re-use of churches will be a major call on our resources. There is also a possibility that grant-aid could be extended to cathedrals, though we could only cope with this if given extra resources.

Industrial buildings: there are parallels between the conservation problems facing redundant churches and industrial buildings; both tend to be large structures with problems over continuing use. We are meeting problems as they appear but new cases keep arising as it becomes harder to maintain original uses and the threat of recession in the early 1990s means that successful, systematic re-use becomes less likely.

Farm buildings: the third problem category, possibly the most critical, will be farm buildings. These have severe problems of adaptation and re-use evidenced by the difficulty of converting barns to residential use.

Public buildings: there is a substantial category of historic buildings moving out of public ownership as a result of privatisation and the forming of agencies, and becoming eligible for our grant schemes as a result. A substantial new demand could result.

Buildings at Risk and condition register the problem is cyclical; fewer country houses are at risk now because of new use solutions for them, while churches and industrial buildings are increasingly at risk as are buildings in decaying city centres. The buildings at risk registers identify problems and will help us to spot trends.

[figure 1 omitted]

Figure 1. Key performance: value for money statement 1989–90

Archaeology we have prepared a review of the last decade of funding of archaeology and a strategy for the next decade, both of which we will publish in 1991 after a period of public consultation. The document will be a statement of the achievements of the last decade of funding, together with a strategy, born of the experience of the 1980s, for dealing with the problems and opportunities which will be encountered during the next decade.

Our own estate: within a ten year period, assuming no major reductions in resource levels applied to this work, we should have finished the foreseeable major repairs and put the whole estate into reasonable order. We should also have brought earned income to a stable level so that our estate is producing as large a net contribution towards our gross costs as possible.

Involvement of others: the more that we can draw others into conservation work the better the chances of success will be. For our own estate we plan to have achieved disposals or management agreements for those of our properties which we can treat in this way. We should also have completed the Stonehenge project with funding and support from the private sector.

Erosion of the real value of our grant-in-aid: this has been happening for some years and is now worsened by current high inflation rates. The 1989 Corporate Plan emphasised the increasing proportion of our grant-in-aid which goes to meet annual pay awards because they have increased faster than the annual uplift in our grant. We are also vulnerable to cost increases in the construction industry. Between April 1984 and April 1989 the general building cost index has risen by 29.8% and the tender price index by 40.6% (both figures from the Royal Institute of Chartered Surveyors). Our grant-in-aid over the same period has risen by 13.6%, from £58.2m to £66.1m (adjusted to account for addition of former Greater London Council responsibilities from 1986). Within this, grant expenditure has risen from £24.1m to £29.5m, a fall in real terms of 4.8%; monument expenditure has risen from £13.1m to £20.8m, a rise of 22.6% in real terms but this figure reflects the need to press on with the large backlog of essential repairs inherited when we took over the properties. A conservative assessment suggests that the buying power of our grant-in-aid has reduced from 1984–85 to 1990–91 by 12%. We need to halt this trend. In ten years' time we will have resolved some important problems but new ones will have arisen. We can only say with any confidence what these are likely to be over the four year forward span of a corporate plan; even then outside forces can influence our projections. If current funding trends continue our financial contributions to conservation in ten years time will have diminished very considerably.

GRANT REVIEW AND RELATED WORK

We have discussed with the Department of the Environment the need for a review of the ways we carry out our work. Their priority is that we should review within the next three years our use of grants schemes and the benefits they bring compared with other uses for the resources. If we used grants less we would have to consider the scope for increasing the contribution made by others, both in the public and private sectors, towards attainment of our objectives.

PERFORMANCE AND THE DEVELOPMENT OF PERFORMANCE INDICATORS

Performance assessment and review take two forms in this year's plan. First, an aggregated 'value for money' statement which sets out key performance indicators. Second, each work programme in the full plan includes targets and performance indicators which define progress towards overall aims and objectives. Performance review is achieved by monitoring programme targets and indicators through a half-year management review and as part of the Corporate Plan and end-of-year review. The annual Corporate Plan is now the vehicle for performance review.

Key performance – 'value for money statement': This statement, set out as figure 1, shows what the government's grant-in-aid to English Heritage has bought and what it has enabled us to achieve and the public benefits this brings. It is necessarily an aggregated table and must be seen in the context of detailed performance figures and overall achievements.

Work programmes – targets and performance indicators: Improvements have been made in targets and performance indicators in the full version of the plan. These cover both recurring tasks (eg continuing to operate grant schemes and monument repairs and to develop our marketing operations) and specific projects which should be realisable for the most part within the plan period (eg various internal reviews).

REGIONALISATION OF THE CONSERVATION GROUP

We were committed to decide in 1989 whether the Conservation group should reorganise its activities on regional lines; Commissioners decided that we should. This must be done as an integral part of the overall plan for the relocation of English Heritage headquarters (see below). The regionalisation of Conservation group work will be introduced as quickly as possible – April 1991 is the target – in order that the new working groups and systems have as much chance as possible to bed down before the move to new premises takes place.

RELOCATION OF ENGLISH HERITAGE OUTSIDE LONDON

The 1989 Corporate Plan set a timetable for the issue of relocation which required us to produce a plan for our long-term accommodation and location by March 1990. Commissioners agreed in principle in December 1989 that we should relocate to a main headquarters outside London which would house the whole organisation except for the Conservation group's London Division, a small secretariat and the PIC regional teams which, as already agreed, will relocate within the regions they serve. Location choices are planned for mid-1990 and implementation will need to be developed within the 1991 Corporate Plan. A relocation unit has been set up to manage the process. Underlying the decision to relocate were economic factors (we estimated a saving in the order of £3m per annum in running costs) and central government pressure in accordance with the policy it is applying to public sector bodies generally to move out of central London.

STAFFING ISSUES

Staffing resources strategy: The Corporate Plan is the vehicle for major decisions on staffing and for bids for new posts. The current planning round produced a range of bids for new posts which are being examined to determine priorities in terms of our needs, aims and objectives. Final decisions on new post bids will be made at the start of the 1991–92 budget bidding round, in November/December 1990, when we will have a clearer picture of our 1991–92 resources.

The financial implications of the staffing bids: Staffing costs at present numbers will increase considerably over the plan period and grow as a proportion of grant-in-aid. Assuming pay increases of between 6% and 8% per year we might need, at current staffing levels, to find between £4.1m and £5.5m more per year by 1993–94 simply to hold staff numbers constant. At the very least, great caution will be necessary in taking on additional staffing commitments and the likelihood is that we will only be able to do this where there is specific additional provision made to fund new posts or where corresponding savings can be clearly demonstrated.

The **training strategy** outlined in the 1989 Corporate Plan holds good, with emphasis on identifying training needs and giving job-based training. The management training programme and professional training continue to have a high priority.

RESOURCES AND THE FINANCIAL PLAN

The financial plan for 1991–94: Figures 2 and 3 show the overall resource picture in graphic form, and more detailed planning figures for 1991–94 are set out in the summary table, figure 4.

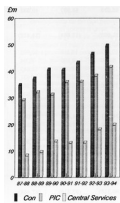


Figure 2. Allocation of resources 1987–94

Planning assumptions and resource availability: The 1989 PES settlement produced new grant-in-aid baselines for 1991–92 of £80.316m and 1992–93 of £85.516m (the apparent large increase being attributable to increased accommodation costs and a ‘marker’ sum of £3m for relocation costs). The 1993–94 grant-in-aid figure of £87.484m is an uplift by 2.5% of the 1992–93 baseline figure, in accordance with the Department’s instruction.

These resource levels represent annual increases in grant-in-aid of 2.1% for 1991–92, 6.5% for 1992–93 and 2.3% for 1993–94. We estimate that our other income will rise by 11.1%, 14.5% and 13.3% over the same period, producing an overall increase in resources of 3.2%, 7.5% and 3.8% for the plan years. In calculating our expenditure and our own income when these planning figures were compiled, we included inflation at 6%. This assumption is modest, particularly for 1991–92. Staff costs are also inflated at 6% though this does not reflect actual increases over the past year or our expectations, at least for 1990–91; within the 6% on salaries both pay rises and provision for payment of increments must be found.

Planning for a deficit budget: the plan is built around the need to continue most of our activities, if not at their existing levels. Resources enabling us to fund existing activity levels (but without funding for any development level) would have produced deficits of £3.8m in 1991–92, £6.16m in 1992–93 and £10.18 in 1993–94. These were unacceptably high; so we reduced them to produce a balanced plan for 1991–92 (the deficit of £0.7m arises from the need for a planned carry forward from 1990–91 to smooth out the grant offer/spend flow) then aimed for the second and third plan years to maintain reasonable operational levels taking into account likely increases in income. In order to avoid unrealistic cuts in activity levels at this stage we are planning deficits of around 4% and 8% for 1992–93 and 1993–94, which allow reasonable freedom for operational activity and indicate our expectation of increased resources.

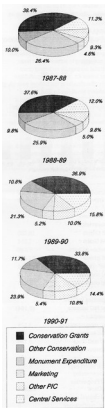


Figure 3. Breakdown of expenditure

The impact of a 5% reduction in resource levels: we are asked by the Department of the Environment to consider the impact that a reduction of 5% in our planned resource levels would have on our activity. Our plan baselines already incorporate cuts from our 'existing activity' levels. We have cut grant offers by 4.5% in 1990–91, 3.5% in 1991–92 and 2.5% in 1992–93. Expenditure on capital works at the monuments falls from £8.0m in 1990–91 to £6.7m by 1993–94 (£5.6m after discounting inflation). Our grant-in-aid resources are already decreasing in real terms. A further reduction of 5% in resource levels would cause serious problems, affecting our major activities as follows:

Grants: in making the cuts detailed above we have allowed for the need to maintain smooth patterns of offer and expenditure. There are strong reasons for not aiming to achieve short term financial savings by reducing grant offer levels for one year.

Expenditure from offers made in the budget year is relatively small (eg for S3A Secular grants in 1990–91, only £1.8m from a budget of £6.9m in a year when offers are set at £8.1m). On such a model, to achieve a spending reduction of 5% (ie £0.345m) requires a cut in offers of 19% or £1.5m. This 19% cut produces unmanageable effects in subsequent years, when the consequences of the cut are out of proportion to the immediate saving achieved.

Our own estate: monument works: it is superficially attractive to achieve cuts by reducing monument works rather than day-to-day maintenance, trading or other marketing ventures. But the effects on the long-term conservation of our estate are worse. A 5% cut from a gross PIC expenditure in 1990–91 of £34.9m would be £1.75m, which is 16.5% of the monument works expenditure (excluding maintenance) for the year. For operational reasons we might have to make short term cuts in this way but, as with grants, the long term effects are damaging to our primary objectives.

Visitor facilities: we have to avoid cuts as loss of income (estimated to rise from £10.7m in 1990–91 to £15.4m in 1993–94) has serious effects on our three year financial plan. This throws the burden of cuts onto other areas.

Staffing levels: in the Conservation group, reduction in staff resources cannot follow immediately on reductions in offer levels as the flow of work from earlier offers continues and it is difficult to cut back staff input into our statutory functions. Staff cuts would affect chiefly the advice functions which are our most effective means of involving others, from both the public and private sectors, in conservation projects. This would be self-defeating. On the Properties in Care side the same arguments hold as for financial resource cuts (see above).

[Figure 4 omitted]

Figure 4: Overall summary (£000s)

Support services: these are related to levels of activity elsewhere. It is unlikely that reductions of 5% would, for example, enable us to relinquish a building as reductions in

complement would be spread across the organisation. So cuts would be likely to produce a worsening of all support services.

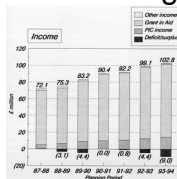


Figure 5. Income

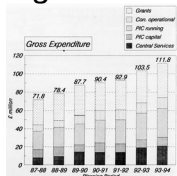


Figure 6. Gross expenditure

The effect of additional resources on output: Our case for the need for extra resources, our justification of our ability to use them and our statement of the additional outputs we would obtain is based on the detailed development bids given in the full plan:

- i. priority developments; each group has produced a list of developments for the plan period to which high priority is given. The cost of these proposals, plus the adjustment for salary costs and the extra provision for pensions is £6.6m, which is an 8.2% increase above grant-in-aid baseline or 7.2% above total estimated income for the year. These developments are all high priority; given extra resources up to this amount we would implement them as set out in the full plan.
- ii. under individual work programmes in the full plan are also listed other development bids which are approved but do not have 'priority' status, or funding. To fund them for 1991–92 would require in the region of an extra £2m, a further uplift of 2.5% in baseline.

Allocation of resources between the groups: Figure 5 gives a breakdown of how total resources have been shared between our operational groups since 1987–88. Figure 6 shows the allocation in more detail by year.

Income earning: our income has continued to rise sharply, from £5.02m in 1986–87, £7.01m in 1987–88, £9.22 in 1988–89 to an estimated £10.13m in 1989–90, with plan figures rising to £15.35m by 1993–94. We are continuing to look for new ways to increase earnings and among those we shall be considering are charging for advice in certain cases; charging for professional or technical training we provide to others; encouraging greater usage of and events at some properties.

CONSERVATION GROUP

KEY ISSUES

Regionalisation The decision has now been made to undertake a major reorganisation of conservation work by April 1991. The three main functional divisions dealing with ancient monuments, historic buildings and historic areas will be reorganised into multidisciplinary regional teams with responsibility for the range of conservation functions in their areas.

The London Division will continue to deal with conservation in the capital.

In the longer term, we expect the change to improve our capacity to deal coherently with the conservation requirements of particular areas, to reduce overlapping functions of staff, and to simplify access to our services for local authorities, owners and other clients. In the short term however, there is bound to be some dislocation of services, particularly where

accommodation changes are required; and our ability to undertake new initiatives will be constrained until the new organisation is well in place.

Value for money and targeting: The real reduction in our main grant programmes in this and the next two years is already requiring us to target our assistance on buildings and areas most at risk. We expect by the end of this year to have developed revised criteria for means testing applicants for section 3A grants. Town schemes and section 10 schemes are reviewed every three years, programme towns annually. We aim to move resources progressively away from areas where recovery is now self-sustaining. We now look to developers to fund archaeological excavation in advance of development schemes without our assistance. Our grants can then be reserved for those sites where the developer cannot reasonably be expected to pay or which are threatened for other unavoidable reasons. The proposed DOE guidance note on planning and archaeology will, we anticipate, underpin our policy in this area.

Progress with our assessment of the state of the building stock and ancient monuments as set out in the previous section of this report is critical to focussing both our grant and advisory work more effectively. In addition to the major surveys, we are undertaking work in connection with most of our major programmes to improve our knowledge on the state of the buildings or monuments with which we deal, and the effectiveness of our intervention. Systems for monitoring the outcome of statutory and grant work are being developed, as are studies of particular problems such as the rate of erosion of monuments and the state of repair of churches. The latter will be based on an analysis of the quinquennial surveys undertaken for each parish church.

In the context of *grant review* (see below), these studies are important as they are necessary to assessing the comparative effectiveness of grant, statutory and advisory work in securing our aims and objectives. Only when we have this knowledge can we make informed decisions on allocating resources between our conservation functions.



English Heritage has established a new grants partnership with the Yorkshire Dales National Park for the repair of field barns and dry stone walls, like these in Swaledale. Farmers and landowners in Swaledale and Arkengarthdale can receive up to 80% of the cost of essential structural work. (Photo: Yorkshire Dales National Park)

Grant priorities and review: We have already begun to make additional offers of grant for churches so that we are ready to spend the extra £3m allocated for this purpose from 1990–91. We expect, as a result of work being done on criteria for Section 3A grants, to be able to simplify the system for these grants, both secular and ecclesiastical, by the end of 1990–91, as well as to target help more precisely to buildings in greatest need. The ‘buildings at risk’ programme will continue to have high priority, but the nature of the problems posed by these buildings suggests that staff resources rather than high expenditure will be required to achieve progress.

We are continuing to target a proportion of our grants to help with difficult buildings in inner urban areas, but here too, our advice continues to be of great importance, probably more than the relatively small sums of money we can offer to secure satisfactory conservation solutions.

Our objective is to be able by the end of the year 1990–91 to review the outcome of all the current initiatives for more effective targeting of grants to assess where our knowledge remains inadequate and to draw up a plan for further review. This study will be facilitated

by the considerable work we have also undertaken to establish more reliable information on expenditure trends and the factors which influence take up of grant.

While the means of individual owners are clearly important in determining priorities for help, the need for, and take up, of grant can also be significantly affected by external factors as varied as weather conditions, high interest rates or problems with the construction industry. The further storm damage to important historic gardens in the storms of January/February 1990 is a case in point. As a result of the serious damage caused then we are assessing the implications for the grant scheme we established after the October 1987 storms; as of February 1990 we have been offered £400,000 extra grant-in-aid for 1990–91 for landscape and garden storm damage and we are bidding for extra funds to extend this for 1991–94.

Any review of the effectiveness of and need for conservation grant schemes must also look at the alternatives, including tax concessions. While we have at present some doubts about the general efficiency of tax reliefs as opposed to grant for reaching genuine problems, there are some concessions which clearly would have a major impact on current problems.

Planning: Our ability to secure the long term repair and enhancement of buildings and areas is closely related to the commitment of local authorities to effective planning policies which reflect conservation interests. Regionalisation of our work will help us to address planning issues more coherently, but we are already devoting increasing resources to advising and helping authorities to develop satisfactory plans for their areas; and to consider conservation interests at the outset of applications for development. The importance of this approach has been emphasised by the case of the Rose Theatre and discussions with York City Council over town centre developments.

Promotion of professional standards: Conservation of the historic environment demands a specialised range of skills, most of which can be found amongst our staff, who include archaeologists, building professionals, architectural historians, scientists and other specialists. It is crucial that, as well as carrying out our work with efficiency and economy, we maintain high professional standards in all these fields, teach others and promote high quality conservation work wherever we can.



After years of neglect, the Square Chapel in Halifax has been rescued by a new Trust, which is converting the building into a centre for chamber music and other performing arts. English Heritage has given a large Section 10 grant towards the repairs. The inaugural concert – by the Lindsay String Quartet – was held in September 1989, during the first phase of the work. (Photo: Ric Mellis, courtesy of the Evening Courier, Halifax)

GROUP OBJECTIVES

Much of the group's activity is concerned with recurring tasks such as continuing to operate our various grant schemes and statutory functions. The control and effectiveness of this work is covered by targets and performance indicators built into the relevant work programmes. The group objectives are designed to relate to priority tasks which are relevant over the plan period, not to covering all of the wide range of our activities.

The major operational programmes of the group will continue over the plan period, but with continuing emphasis on identifying and targeting those structures and areas most in need of assistance.

Our group objectives are:

1. *Reorganisation*: To complete the agreed reorganisation of the Conservation group with the target date of April 1991 for implementation.
2. *Identification – list review* To review the remainder of the 379 inadequate lists of historic buildings and to have recommendations to DOE by 31 March 1992.
3. *Identification – monuments protection programme*: To continue, as far as resources allow, to carry out the MPP with a view to completing it within ten years if possible.
4. *Assessment of need and targeting of grant* To improve our understanding of those elements of the historic environment which remain most at risk, both in terms of types of property and the ability of owners to afford conservation with a view to targeting grant programmes and advice more precisely.
5. *Service*: To improve the service we offer to owners and others by improving the speed with which we handle casework, and the availability and clarity of the advice we provide through publications and other means.

PROPERTIES IN CARE: BUSINESS PLAN

GROUP OBJECTIVES

Our group objectives are:

1. To make significant progress over the plan period in improving the repair, preservation and maintenance of our properties in care, their settings and the associated collections, as dictated by the mission statement of English Heritage.
2. Over the plan period to continue to improve the visitor facilities at our properties and the way they are presented and explained, so that the properties become more attractive, more people visit, and their visits are enjoyable and informative.
3. To make and maintain historical and archaeological records of the properties, and in particular to add to them by careful and thorough recording and excavation before and during repair and maintenance works.

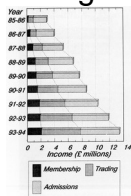


Figure 7. Income from visitors to 1994

4. To maximise income earned from visitors and other sources, within the constraints set by our other duties; more specifically, over the plan period to improve the ratio of earned income to grant-in-aid, to increase the proportion of income generated by retailing and catering, and to increase the net contribution made by income to the costs of maintaining and repairing the estate.



The Hellfire Comer Complex beneath Dover Castle: an operations room

5. To play a part in the wider world, giving advice, working with other organizations, and promoting knowledge of and interest in historic buildings, ancient monuments and conservation.



Hellfire Comer, Casemate level, before repairs were started to open the complex to the public this May.

PLANNING THE MANAGEMENT OF THE ESTATE

Financial management systems for the monuments:

our financial management systems have been further developed during 1989–90. Monument operation accounts are now produced annually for the 20 most visited properties (visitor numbers above 60,000) and as needed for smaller ones. We have also produced trading accounts on a commercial basis for our trading and membership operations. In mid-1989 we introduced a membership computer system which is more efficient and sophisticated than the previous system and cheaper to operate. In late 1989 we introduced a new trading stock and sales system and at the start of 1990 we made new arrangements to contract out the warehousing and distribution of our trading stock. As a result we now have much better information with which to inform management decisions.

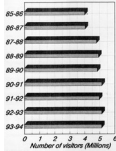


Figure 8. Visitor numbers to 1994

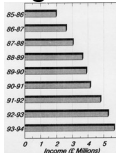


Figure 9. Admission income to 1994

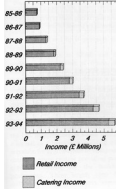


Figure 10. Trading income to 1994

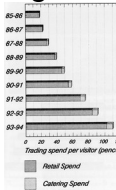


Figure 11. Average trading spend per visitor



The main kitchen at Brodsworth Hall

Also in 1989–90 we have all but completed individual ‘summary monument plans’ giving in a standard format basic information (costs, visitor numbers, works and presentation proposals and outstanding problems) on each of the properties. These will be revised annually, beginning in 1990–91, and will become the basic working document for planning ahead.

We will deal with recurring maintenance by continuing to develop the programme of planned maintenance inspections for each monument, aiming to complete the first round of inspections by the end of 1990–91 (they have been held up in the South West region by a serious and continuing shortage of technical staff) and thereafter continuing to review one third each year. This system ensures that we know what work needs doing at the properties each year, that it is being done, and that the condition of the property is checked.

What we can do in the planning period:

The chief constraint is the rate at which we can plan and carry out work given the level of financial and staff resources. As financial resources decrease in real terms through the planning period, a greater proportion is taken up by the cost of maintenance and urgent repair work and less is available for potentially profitable investment in visitor facilities. Two particularly important tasks will affect us during the planning period. The first is Brodsworth Hall. The second is our proposals, announced in November 1989, to provide better visitor facilities at Stonehenge.

The *Stonehenge* project has our first priority during the period of the plan. It is a World Heritage site and desperately in need of improvement. The 1989 PES settlement recognises for the first time the urgency of the problem. We believe that we could complete it without using grant-in-aid for the costs of development, though planning and managing the project will call on considerable staff and financial resources. We have appointed consultants to help us so that planning can proceed as quickly as possible given the various stages to go through, including the near certainty of a public inquiry into our proposals.

Repairs to *Brodsworth Hall* will begin in 1990–91 and we anticipate a spend of around £0.3m, less than we projected in last year’s plan. This is because the negotiations over the acquisition of the Hall took several months longer than we had hoped. Saving Brodsworth is a major undertaking for us and we regard getting it right as more important, in the long term, than doing it at top speed.

We will also be continuing to develop the marketing of the estate over the planning period, and figures 7–13 show how membership, trading and visitor numbers and income are planned to increase.



Brodsworth Hall: the morning room

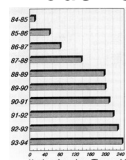


Figure 12. English Heritage Membership

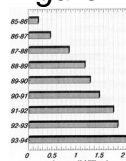


Figure 13. Membership income

THE DEVELOPMENT OF THE ESTATE

Acquisition of properties:

we will only acquire properties which are of national importance, which are in need of and merit preservation and where English Heritage is acting as acquirer of last resort. It is impossible to plan for this effectively so cases arising may have to be dealt with outside the corporate planning framework.

Disposals and management agreements:

we examine the scope for involving others in management of sites in circumstances where it brings investment which we could not afford to make ourselves, reduces costs to English Heritage without risk to the property, or brings skills or expertise not available within English Heritage. The options normally are: joint management agreements with other bodies for the use or display of our properties, which will reduce the running costs; attraction of private capital where there is potential for a commercial return; and sale on long lease of properties with potential for beneficial use.

CENTRAL SERVICES

The full Corporate Plan details the nature and scope of our central support services, their objectives and targets and the ways in which they will support our operational efforts over the plan years.