

Conservation Bulletin, Issue 15, October 1991

Corporate Plan insert from between 10 and 11

CORPORATE PLAN

1991–95

THIS SHORTENED VERSION of the full Corporate Plan summarises the main points of our plan for 1991–95, 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 1992–93 in some detail and to the later plan years, 1993–94 and 1994–95, in broader outline. It also sets out longer term aims where this is useful.

ORGANISATIONAL GROUPINGS

The Conservation group reorganised on 1 April 1991 and is now made up of an unchanged London Region and three regional teams, each covering the full range of the group's activities, with some specialist or indivisible functions staying at the centre. The group deals with our advisory work, grant assistance, and other involvement in the national stock of historic 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 have been revised since the last plan to take account of new and changing priorities. These are:

1. To carry out work to improve our knowledge and understanding of the state of the historic environment in England; to evaluate this work periodically as a basis from which to assess more precisely the need for action.
2. To maintain and present an efficiently managed estate of historic properties which provides a national exemplar of good practice and continues to earn an increasing percentage of its total costs.
3. 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.
4. To make more explicit to our own staff and others the standards to which we work with a view to strengthening both our internal competence and external authority.
5. To relocate our Headquarters and the PIC regional teams as smoothly as possible, with particular attention to the organisation's long term efficiency and to the needs of all our staff.

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

The new Technical Services Group was set up in July 1990. Its work falls into four categories:

Specialist services and advice to the Properties in Care and Conservation groups, covering a wide range of professional skills.

Research and development in all relevant fields.

Craft, technical, professional and scientific training.

Defining and promoting conservation standards.

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

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

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

THE STATE OF THE HISTORIC ENVIRONMENT

The 1990 Corporate Plan emphasised our work to define the historic environment as clearly as possible. We believe our existing programmes to be adequate but may need to look at speeding up this work, at the expense of other activity, if emerging results show new problem areas.

The 1990 PES settlement built on the previous year, providing extra funding for buildings at risk surveys, the Monuments Protection Programme, and the national survey of the condition of ancient monuments. This met the point made in the 1990 Corporate Plan that we had no security in these programmes beyond 1990–91. The listing review is due for completion in 1992–93.

Assessment of need:

Identifying the national historic environment is crucial to assessing resource needs. To do this comprehensively is beyond our means. Our approach is to supplement existing exercises with elements of needs assessment work.

Buildings at Risk register and surveys:

Sample surveys are now under way in 62 District Council areas, grant-aided by English Heritage; a register for London has been produced. We will be analysing the first results of the surveys in late 1991. The 1990 PES settlement funds us to continue this programme until 1993–94 and it is due for completion in 1995.

Monuments Protection Programme:

The PES settlement for 1991–92 confirms sufficient funding for this project to bring it to the capacity we had planned until 1993–94. We envisage a detailed review of progress and of the implementation strategy in 1993. By then we should be able to specify a total number of scheduling proposals, and perhaps accelerate the flow of recommendations towards a fixed completion date.

Listing review:

The review of 379 seriously inadequate lists is due for completion in 1992–93. Fieldwork has been completed in Manchester, Sunderland, Stoke-on-Trent, Birkenhead, and Wolverhampton among the larger industrial centres, while in London Islington has been reviewed. The new draft list for Preston was the first to be submitted to the Department.

Churches:

We are reviewing a sample survey conducted in 1973, covering the churches of three archdeaconries. We propose to extend the survey to include non-Anglican churches where possible. The objective is to assess progress since 1973 in achieving repairs, and to compare the condition of buildings then and now.

Cathedrals:

In its 1990 White Paper *This Common Inheritance* the government expressed its support for direct assistance to cathedrals. The 1990 autumn statement provided a substantial sum – £11.5m spread over three years, beginning in April 1991 – for the repair of cathedrals (including non-Anglican buildings), to be administered by English Heritage. We have completed a study of the need for repair to Anglican and Roman Catholic cathedrals.

The condition of our own estate:

An overall decrease in the level of resources means that we have found it necessary to move funds away from further improvement of visitor facilities in order to keep

maintenance at a reasonable level. Our objective, using the system of planned maintenance inspections and summary monument plans, is to put the estate into good repair by the end of the decade. Given the present overall manpower and financial resource constraints, it is not clear whether that objective is realistic. A new corporate objective emphasises that it is our first duty to care for the estate, and that we aim to do this in an exemplary way.

Conservation skills in the building industry:

For most conservation projects the crucial factor is the building industry's ability to provide a good standard of work under the direction of building professionals, especially architects, with good conservation skills. Conservation expertise is more in demand now. Yet there are crucial shortages, both of skills and of traditional materials and components, which inhibit good work. We have recognised the importance of our role here by establishing our specialist professional and technical services as a separate Technical Services group, one of whose main objectives will be to develop its advisory and training role.

Ten year forward look:

Our Corporate Plan looks three years ahead from the current budget year. For most resource planning this is as far as we can practicably look, given the way Government funding works. In other respects, though, it is important to see further with reasonable accuracy. Our work on needs assessment and the state of the historic environment is our most direct effort to develop a longer-term picture of resource needs. We must also look at new needs and initiatives. To do this effectively we need the means to assess a range of influences and trends affecting our own work and priorities: economic, social, political. This is against a background of slow change; a significant shift in our priorities will normally take longer than a three-year planning period to be fully implemented. Throughout 1991–92 our Commissioners will be looking at the long term priorities of all our activities and the results will inform the 1992 Corporate Plan

This Common Inheritance is a statement of the present Government's position on environmental matters, including the built heritage. Its predominant concern is the natural environment, but we welcome the clear emphasis it also places on developing issues relating to the built heritage and the historic environment. We are confident that any incoming administration would continue to put environmental and heritage matters high on its agenda.

[Figure 1 omitted]

Figure 1 Key Performance: value for money statement 1990–91

Involvement of others:

The more we can draw others into conservation work the better the chances of success will be. For our own estate we plan to achieve disposals or management agreements for those properties we can treat in this way. Our first consideration must be the long-term safety of the monuments. We are also looking for joint projects, of which the prime example will be Stonehenge, where we plan to work closely with the National Trust and others, raise substantial sums from sponsorship to finance the project, and establish a 'Stonehenge Trust'.

In our grant and advisory work we are facilitators; we do not normally have the means or the powers to bring projects to completion. For that we depend on owners, developers, their architects and advisers, local authorities, and other public and private bodies. It is vital to our effectiveness and to the value for money we achieve that our involvement with these third parties is positive and fruitful.

ENGLISH HERITAGE AND THE ENVIRONMENT GENERALLY

This Common Inheritance covered broad issues of environmental concern: land use and planning controls, the countryside, landscape, wildlife, the rural economy, the world environment, pollution, and more. The built historic environment plays a relatively small part in it. Even so the White Paper states, or restates, priorities which reinforce a strong government commitment to conservation of the built environment. Of its nature it tended to be general in tone, outlining problems and stating policies but not immediately providing the means to find solutions. These have to an extent been found since, with a significant boost to environmental resources including our own. In particular we welcome £11.5m of funding over three years to enable us to implement a grant scheme for repairs to cathedrals.

Government heritage policy as stated in the White Paper includes:

increasing support for historic buildings where it is needed, for example to help cathedrals, and museums and galleries;

giving a higher priority to grants for historic town centres and industrial heritage;

providing clear and updated advice on preserving and enhancing the heritage;

measures to increase public interest and involvement;

better protection for scheduled monuments;

ensuring that tourism damages the environment as little as possible;

a new register of historic landscape sites, including battlefields, and improved records of the heritage as a whole;

setting up a ministerially-chaired heritage forum to explore heritage issues; and

continued support for tax reliefs to encourage owners to keep buildings in good repair and open to the public. (quoted from the summary of the White Paper on the environment, p 21)

Implementing these policies will create extra workload for English Heritage, which we cannot yet quantify. Some of these initiatives, such as the register of landscape sites, are wholly new work for which no additional provision has been made. This has resource implications for current work and priorities.

English Heritage and the 'green' movement:

Conservation of the historic built environment has much in common with the wider 'green' movement. Preservation of traditional buildings in their historic settings is closely related, in its motivation, to the preservation of natural resources through broader environmental conservation. English Heritage normally advocates the use of traditional natural materials in repairs to old buildings, regarding them as a wasting resource which must as far as possible be preserved. We concern ourselves with broader issues of setting and environment, both rural and urban. Our remit often involves us in questions of general environmental concern such as road planning or major developments. The new task of preparing a register of landscapes and sites which are of historical significance will require us to work with the Countryside Commission and others.

In addition we are trying now to adopt more environmentally aware practices where we can in the day to day management of our organisation, though we acknowledge that we have still some way to go in this.

GRANT REVIEW AND RELATED WORK

In last year's Corporate Plan we noted the Department of the Environment's wish for us to review within the next three years our use of grants schemes and the benefits they bring compared with other use of the resources. In 1990-91 the National Audit Office began a review of organisations concerned with heritage work, including English Heritage and the Department of the Environment, with a view to assessing their effectiveness. In particular

the NAO proposes to look at how effective some of our grant work to date has been. Their review is due for completion in November 1991. At the same time we have been reviewing the issue of outstandingness and the means by which we make financial assessment of the need for grant in individual cases. Progress on these matters may affect the need for grant review

PERFORMANCE AND THE DEVELOPMENT OF PERFORMANCE INDICATORS

Performance assessment and review take two forms in English Heritage's corporate planning process:

an aggregated **key performance and 'value for money statement'** (Figure 1) gives an aggregate picture of what the government's grant-in-aid to English Heritage has bought, what value for money this gives, what it has enabled us to achieve, and the public benefits from it. It is agreed with the Department as representing our key performance review.

Work programmes – targets and performance indicators which monitor and record progress towards overall aims and objectives. The task of reviewing and improving the organisation's targets and performance indicators continues. These are designed to 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 such as that on pay and grading). They are set out in the full version of the plan.

The Citizens' Charter, published since this plan was put together, urges public bodies to be more open in publishing details of their performance. Our key performance table (Figure 1) as an example of how we have already started to do this.

REORGANISATION AND REVIEW

In addition to operational checks through staff inspection, internal audit, and other controls, there is a continuing programme of internal reviews. The main ones are:

Management review, Technical Services group: the new group was set up in July 1990 on the premise that a management review, involving outside consultancy, would examine its structure and operations. The report was completed in February 1991; implementation will continue into the plan period.

Committee review: the structure and effectiveness of our range of advisory and sub-committees. Carried out internally; first report to Commission November 1990, final report February 1991, implementation of main points by November 1991.

Legal services review: the means of provision of legal services to the organisation. A report by external consultants, implementation planned for 1991.

Press and public relations review: the extent and type of services offered, and how they might be improved.

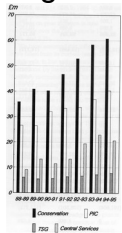


Figure 2 Allocation of resources 1988-95

Carried out internally for agreement and implementation in 1991-92.

We are also subject to a range of external reviews; the National Audit Office has been mentioned and the Department imposes audit control and other checks of which one, a financial management and policy review, began in 1990-91. The Department's main

objective is to assess whether our various management and control systems are sufficiently solid to merit greater overall freedom in managing our own affairs. For us this is a question of balancing the pros and cons of present controls against any that might emerge as a result of the FMPR.

STAFFING ISSUES

New post bids for 1992–93:

In 1990–91 we introduced a new procedure, managed through the corporate planning round, for assessing bids for additional posts. All of these bids will be examined and decided by the end of 1991. The majority are for new work, such as the new cathedrals grants scheme, and, as last year, those posts which are approved will almost always be for new areas of work.

The staff costs to resources ratio is affected chiefly by the level of pay increases which, because we are bound by Civil Service pay and conditions, is outside our control. Our pay and grading review, which will look at this issue among others, is due for completion in 1991.

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. We hope, subject to the provision of extra resources for which we are bidding, to be able to increase resources put into training over the plan period.

RELOCATION

Commissioners agreed in July 1990 that we should relocate to a main headquarters in Nottingham which will house the whole organisation except for the Conservation group's London Region and the PIC regional teams which will relocate to the regions they serve, with possibly a small core of essential services retained in London. The new relocation unit is working on detailed plans and costings for all these moves.

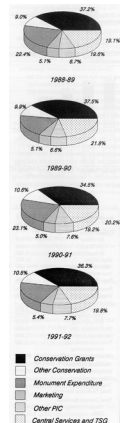


Figure 3 Breakdown of expenditure

Our detailed relocation plans are still in their early stages; in 1991 we will be identifying specific locations for all the moves, drawing up detailed plans and costings and beginning to introduce staff to Nottingham and the other selected locations. Our 1991 PES bid must refine the outline figures which we submitted in 1990, including the costs of the main move to Nottingham and those for relocating the PIC regions, the London Region (which cannot remain in its present accommodation), and any other London provision; also all the ancillary costs of moving, such as extra provision for recruitment.

Given the many unknown quantities, we have not attempted to set out the operational effects of relocation; our non-relocation use of resources and programme outputs is shown as developing normally up to 1994–95; any other approach would at this stage be

unrealistic. Once trends begin to develop, for example clear signs of increased staff turnover as a result of relocation, we can measure these and adjust our plans accordingly. This will mean short-term changes. By the next corporate planning round we expect the trends and effects of relocation to be clearer, and to be able to adjust our resource and planning needs accordingly.

1992–93 £101.6m Includes 6.0m for relocation and £4.0m for cathedral grants
 1993–94 £108.5m Includes £8.0m for relocation and £5.5m for cathedral grants
 1994–95 £111.2m An uplift by 2.5% of the 1993–94 baseline, including £5.0m for relocation and £5.5m cathedrals

RESOURCES AND THE FINANCIAL PLAN

Planning assumptions and resource availability:

The 1990 PES settlement produced new grant-in-aid baselines for the planning period (above). The year on year variances are distorted by the inclusion of relocation and of cathedral grants. The table below gives the relevant comparisons:

	1991–92	1992–93		1993–94		1994–95	
	£m	£m	% incr	£m	% incr	£m	% incr
a) Baseline	89.8	101.6	13.1	108.5	6.8	111.2	2.5
b) Excluding relocation	89.8	95.6	6.5	100.5	5.1	106.2	5.7
c) Excluding relocation and cathedrals	89.8	91.6	2.0	95.0	3.7	100.7	6.0

[Figure 4 omitted]

Figure 4 Overall summary (£000)

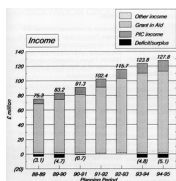


Figure 5 Income

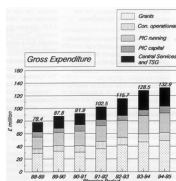


Figure 6 Expenditure

When reviewing the amounts required to maintain existing programme activity (ie after deducting relocation and cathedrals grant) it is important to remember that we have assumed inflation rates of 5% per annum for the plan years. Even assuming that our resources did not have to cover any new or increased activity, to maintain the 1991–92 levels in real terms (ie with a full allowance for inflation at 5%) would require an extra £2.7m in 1992–93 alone.

We project that our other income will rise from an estimated £12.64m in 1991–92 to £13.49m in 1992–93, £14.04m in 1993–94, and £ 14.62m in 1994–95 (year on year increases of 6.7%, 4.1%, and 4.1%). Our year on year increase in total resources over the plan years is 12.4%, 6.5%, and 2.7%.

We have assumed that inflation will have fallen from its current (early 1991) high levels, in line with government predictions, by the end of 1991. The Treasury recommendation for inflation levels for planning purposes is 4%; this seems low, so in calculating our plan for 1992–95 we have raised it to 5%. Staff costs are also inflated at 5%, which is less than

actual increases over the past year or our expectations, at least for 1991–92. With the 5% on salaries both pay rises and additional provision for incremental increase must be found.

The financial plan for 1992–95:

Figure 4 is the summary of the 1992–95 financial plan, with 1991–92 budget and outturns for 1988–90 also shown. Figures 2 and 3 show the allocation of resources and the breakdown of expenditure over several years.

Planning for a deficit budget:

The plan is built around the need to continue most of our activities, maintaining existing levels where resources permit, and strategies have not changed. The point is made above that inflation is reducing the level of resources we have. Based on the various assumptions we have made, we have aimed to produce a balanced plan in 1992–93; the level of PES settlement in 1990 has allowed us to do this, though in achieving that plan much rests on the actual level of inflation; in round terms, 1% variance is equivalent to £1.0m. We have not been able to eliminate planned deficits of £4.8m in 1993–94 and £5.1m in 1994–95. The inclusion of a total £19m towards the costs of relocation over the three plan years has been possible within these deficits.

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. Given the pressure on resources, which necessitated the deficit plan base, a further cut of 5% 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 same year is relatively small (eg for S3A Secular grants in 1992–93, only £2.71m from a budget of £7.96m in a year when offers are set at £9.0m). On such a model, to achieve a spending reduction of 5% (ie £0.40m) requires a cut in offers of 14.7% or £1.33m. This 14.7% cut in offers produces unmanageable effects in subsequent years, when the consequences are out of proportion to the immediate saving achieved.

Our own estate – monument works:

We have moved a balance of resources away from visitor facilities to enable completion of necessary monument repair and maintenance, but still the overall resources for repair and maintenance drop from 1990–91 levels then slowly climb back over the plan period. Further cuts would slow that process and could well endanger the safety of the estate.

Visitor facilities:

The result of moving resources away from visitor facilities over the plan years is a fall in income expectations. Further cuts may result in no increase, or even a reduction in income.

Staffing levels:

We made the point last year that grant commitments would continue to have to be honoured and are staff intensive. Conservation group staff cuts would therefore affect first those advice functions which are our most effective means of involving others, both from the public and private sectors, in conservation work. Properties in Care also has

contractual commitments to be honoured; it would then be tempting to maintain visitor services, and hence income, but that would be at a cost to the long-term safety of the estate.

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.

The effect of additional resources on output:

In general terms, our three year plan shows a need at this stage for additional resources overall of around 3% if we are to balance all three years at existing planned output levels. More specifically, our case for the need for extra resources to increase outputs, 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 plan. These are our priority developments and they are listed in each group section and in the corporate summary in the full version. The cost of these proposals in the first plan year, 1992–93, is £5.9m, which is a 5.8% increase above grant-in-aid baseline. These developments are all high priority. Extra resources up to this amount would enable us to carry them out.

Breakdown of administrative costs:

These are as set out in the Annual Report. The figures for 1989–90 (p 43 of English Heritage Annual Report 1989–90) were:

	£m
Consultancies	2.75
Travel and subsistence	1.39
Accommodation	7.06
Office services	3.29
Non-reclaimable VAT	1.19
Audit fees	0.04
Staff salaries	14.62
Depreciation	1.54
Members costs	0.14
TOTAL	32.02

The issue of administrative costs as a proportion of total resources is under discussion with the Department of the Environment, as part of a financial management and policy review which it is conducting. Other non-departmental public bodies are also subject to this process.

Allocation of resources between the groups:

Figure 2 gives a breakdown of how total resources have been shared between our operational groups since 1988–89; Figure 3 shows the allocation from 1988–89 to 1991–92 in more detail as a series of pie-charts.

Income and expenditure:

Our earned income has been rising sharply, from £5.02m in 1986–87, £7.01m in 1987–88, £9.22 in 1988–89, £10.81m in 1989–90, to an estimated £11.54m in 1990–91. Estimated income then continues to rise, but more slowly, to £14.62m by 1994–95. We had feared

the effect of the Gulf war on international tourism and hence on our income but its early end should mean that any loss of income will be confined to the early part of the 1991–92 season. Figure 5 shows the growth of income both from our own income-earning activities and from Government Grant-in-Aid. Figure 6 completes the picture by showing the expenditure pattern for the planning period.

CONSERVATION GROUP

KEY ISSUES

Regionalisation:

The new Conservation Group structure will be implemented from 1 April 1991. While we hope that the major disruption will be over by mid-year, the regional teams will undoubtedly take some time to settle into new accommodation and responsibilities, and it will take us further time to adjust to the broader perspectives which this reorganisation is designed to encourage. We may well need to adjust our procedures in some areas over the year, although a considerable amount of groundwork already completed this year will underpin the new organisation, including networking of the computer systems. The possibility of further streamlining in advance of the move to Nottingham will need to be borne in mind.

Staff resources:

While the new organisation should help us to use staff more flexibly, we will remain stretched at all levels to cope with the very considerable grant and statutory caseload. It is important that time should be found for training to increase both job satisfaction and competence. Serious thought must also be given to the possibility of encouraging local authorities at both county and district level to take on work wherever this is within their competence. While there still remain gaps in local competence in conservation work, there are now a good many authorities well staffed and willing to take on more responsibility for both buildings and monuments.

Value for money and targeting:

Notwithstanding the increase in grant monies for the plan period, it will remain essential within the means at our disposal to focus our efforts on those structures and areas in the worst physical condition and greatest financial need. There is a risk that if we cannot offer sustained assistance to important buildings with rolling repair programmes, some work may be postponed longer than is desirable. It will continue to be important to ensure that essential work for which owners genuinely need financial assistance is not deferred too long. It is however difficult to avoid the logic of dealing first with buildings which have no, or an uncertain, future. A reasonable first sample from the Buildings at Risk survey undertaken in conjunction with local authorities will become available this year, enabling us to understand better where the worst problems now lie.

Grant priorities and review:

The first tranche of £2.0m financial assistance for cathedrals becomes available in 1991–92, with an increase over the following two years (£4.0m and £5.5m). In general terms, we expect to allocate this money in line with the criteria we have already developed for church repairs, sifting applications both in terms of the needs of the building and the means of applicants. Survey work is already under way to establish a broad picture of the condition of those cathedrals and buildings of equivalent importance in other denominations which may qualify for assistance. Procedures will need to be developed in close consultation with

the ecclesiastical authorities and the Cathedrals Fabric Commission newly established under the Cathedrals Measure.

There will be further expenditure on the scheme to deal with gardens damaged in the storms of 1987 and last year. The PES settlement has funded pilot work on a permanent garden grant scheme which has long been one of our objectives. More generally, we plan to devote increased resources to conservation areas and industrial buildings which were identified as a priority in last year's plan.

Planning:

The publication in 1990 of the Planning and Policy Guidance Note on Archaeology and Planning marked an important milestone in archaeological policy. It is imperative that we follow up this initiative over the coming year to encourage planning authorities to understand and implement its message. In London, where there is no 'county' archaeologist, this will mean providing an advisory service ourselves for the Boroughs. Elsewhere, we may have to help authorities develop the information base from which to frame an adequate conservation policy, for instance by accelerated resurvey in Urban Development Corporation Areas, and the preparation of archaeological strategy documents for important, particularly urban, areas. We attach continuing priority to consultation on development plans for important historic areas, and expect to provide input to a wide range of plans and documents which are designed to establish a framework for development.

Database:

The increase in the number of listed buildings and scheduled monuments, together with the ever increasing caseload of field officers, has underlined the importance of developing efficient and readily accessible data systems which we can share with other bodies in the conservation field. We are developing our in-house systems in line with the latest computer technology, while liaising closely with the Royal Commission on the Historical Monuments of England to ensure that their parallel developments are compatible with ours, and that there is no duplication of effort in an inevitably expensive exercise.

GROUP OBJECTIVES

The detailed objectives and targets for the main cataloguing, grant and statutory functions which account for the majority of our resources are set out as part of the work programmes in volume 2 of the plan. Broadly speaking their focus will remain unchanged, although the early results of the Buildings at Risk survey and integrated assessment of need on a geographical basis may involve some further tuning over the plan period to reflect the most acute current needs.

Our priority **group objectives** are:

Identification – list review, Monuments Protection Programme and Register of Historic Landscapes: target date end 1991 unless otherwise stated

A Identification: to review progress towards completing the remaining inadequate lists of historic buildings by Autumn 1991, taking into account the effect of this programme on spot listing requests.

B Identification: to review the methodology for the MPP to ensure the completion of that programme within the decade.

C Identification: to undertake pilot work on the compilation of a register of historic landscapes by Autumn 1991 to allow assessment of the implications of a larger exercise over the plan period.

D Identification: to plan progress with revision of the Gardens Register which has proved its worth both in relation to storm damage initiatives and planning guidance.

Assessment of need:

E *Assessment of need*: to analyse the results of the sample Buildings at Risk survey and its implications for grant and statutory work.

F *Assessment of need*: to take forward work on the monument condition survey and other surveys of threatened areas of the countryside eg N W Wetlands, to guide future management policy; to complete condition surveys of cathedrals and parish churches.

G *Assessment of need*: to apply consistently the tighter criteria developed for assessing the financial need of owners for grants.

Service:

H *Service*: to ensure, both through the reorganisation of work and the provision of more effective data and backup services, a more effective and sensitive service to owners and other bodies.

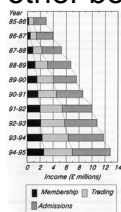


Figure 7 Income from visitors to 1995

PROPERTIES IN CARE BUSINESS PLAN

GROUP OBJECTIVES

These objectives have been substantially redrafted since the 1990 Corporate Plan, with the objective of making them more precise rather than defining any major strategic change.

A To prepare and keep up to date thorough condition surveys of all our properties and collections.

B To put the whole of our estate into good repair by the end of 1999–2000, prioritising individual projects according to the importance of the fabric and the urgency of the work.

C To put together and keep up to date a comprehensive historical and archaeological assessment of all our properties, carrying out careful and thorough recording before and during any works that could affect historic fabric.

D To open our properties to the public, providing sufficient interpretation to make visits enjoyable and informative and presenting and displaying them in a way that reflects their importance as part of the national and international heritage.

E To encourage more people to visit our properties whenever it is possible to do so without putting historic fabric at unacceptable risk.

F To maximise the profitability of our operations within the constraints imposed by our other duties and by the availability of resources for investment.

G To play our part in the wider world, making use of our properties as exemplars of good conservation practice, developing and testing new techniques of repair, publishing our findings, giving advice to others based on our experience and promoting among our visitors and members an interest in and knowledge of conservation issues generally.

H To create a more efficient and responsive organisation by relocating our regional teams into their areas, in doing so paying particular attention to the needs of the staff involved.

PLANNING THE MANAGEMENT OF THE ESTATE

Financial Management Systems

continue to be developed. From April 1991 we will have three-year runs of Monument Operation Accounts and of the trading accounts for retailing, catering and trading activities, enabling us to make useful year-on-year comparisons for the first time. We are introducing an electronic monument information system to collect financial and visitor data from individual sites and make it accessible in reports and on terminals in all our headquarters and regional offices.

What we can do in the planning period:

Since the last Corporate Plan was prepared we have been reappraising the recurrent costs of maintaining the estate and continuing to provide the present level of service to our visitors. This is why we are continuing to try to improve the efficiency of our maintenance work and are aiming to complete in 1991–92 the planned review of our charging policy. It nevertheless means that we have fewer resources available for non-recurrent expenditure than we planned last year.

We have now completed the first round of planned maintenance inspections. These have led us to reassess the amount of work needed to meet our objective of putting the whole of our existing estate into good repair by the end of 1999–2000.

We see this as the first call on our resources, so have had to cut back severely on improvements of visitor facilities in order to keep expenditure within the planning figure. Provision for visitors at Lulworth, scheduled for 1992–93, will be delayed by almost a year; substantial projects for catering and retailing facilities at Kenilworth Castle and for a visitor centre at Scarborough Castle, listed in the 1990 Corporate Plan as funded for implementation in 1992–94, can no longer be accommodated within the current planning period.

Even this does not produce an increasing amount for monument repair and maintenance until the end of the plan period. Monument works fall from £7.8m in 1990–91 (estimated outturn) to a budget of £7.14m in 1991–92, then from 1992–95 (at 1991–92 prices for comparison) £5.94m, £6.84m and £7.87m.

Since Brodsworth came into care in April 1990, the house, its gardens and its contents have been intensively surveyed and inventoried, both as a record and as a basis on which to plan our future work. The surveys have identified substantial amounts of work to be done, as was to be expected. It is now likely that the house will open to the public in 1993.

We aim over the plan period to realise the proposal to improve the surroundings of Stonehenge. Our intention is to remove the modern intrusions so that the monument can be seen again in its rich archaeological setting. The present car-park and visitor facilities would go, along with the A344 which runs hard up against the monument. The new visitor facilities would be well screened at a distance north of the site, reached by a new approach road from the west. The proposals will go through the local planning process, starting in Spring 1991; we anticipate public inquiries for all aspects of the scheme.

Our development of the scheme so far has used grant-in-aid resources. We will bid through the PES process for part of the design and construction costs in 1992 and beyond, on the assumption that necessary approvals are obtained. These costs will be very high so additional support from external funding will be required. The project has high infrastructure and running costs and income generated would not support commercial investment sufficient to pay more than a small part of construction costs. We shall be seeking sponsorship and other forms of partnership to provide the remainder. The international renown of the site makes this a feasible proposition

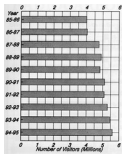


Figure 8 Visitor numbers to 1995

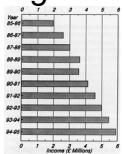


Figure 9 Admissions income to 1995

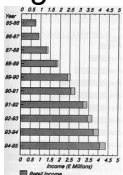


Figure 10 Trading income to 1995

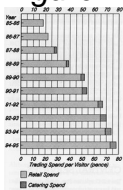


Figure 11 Average trading spend per visitor to 1995

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 plan 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; sale on long lease of properties with potential for beneficial use.

'Revolving fund' operations:

We can also undertake a process of acquisition in order to save and repair, followed by resale for a new, suitable and secure use. We are negotiating on a number of cases for disposal or joint management and during the period of this plan we expect to conclude a number of such agreements per year. Progress is as dependent on others as on English Heritage; negotiations are always complicated because of the need to safeguard the preservation of the monument and our financial position.

Sponsorship and patronage:

We have already developed a number of profitable and effective sponsorship contacts. Over the planning period we will be giving the search for patronage, sponsorship and fund

raising a higher priority. In particular we hope sponsorship can replace some unfunded visitor orientated developments which have had to be deferred. The conservation and management proposals for Stonehenge would be the biggest sponsorship project we have yet undertaken.

Figures 7–13 give details of the Properties in Care Group's performance.

TECHNICAL SERVICES GROUP

INTRODUCTION

Plans for the dispersal of PIC regions and the creation of multi-disciplinary teams for the bulk of the work of the Conservation Group have been complemented by the creation of a new Technical Services Group (TSG). The Group is made up of the various professional, technical and scientific disciplines in the Ancient Monuments Laboratory and the former Directing Architect's Division. Its role is to ensure the most effective use of those specialist skills which best meet the needs of English Heritage by operating as a single, central resource.

TSG aims to be a fully integrated professional, technical and scientific group which works with others:

to provide a high quality service in response to the defined needs of clients;
to set, promote, maintain and review standards for our own purposes and that of others;
to define and execute programmes of research, development and training.

As in the past, the majority of the resources in the group will be directed towards the support of PIC and Conservation programmes. But, increasingly, there are corporate activities on behalf of English Heritage as a whole which are likely to demand more effort. TSG's own inheritance of experience in conservation work must be gathered together in a clearly defined framework, to be used for the good of the estates in our care and in order to enhance the EH mission for the conservation of our national heritage. It will also be important to create even stronger links with other bodies.

KEY ISSUES AND OBJECTIVES

The creation of TSG and the effects on it of other organisational changes and of the relocation of our headquarters to Nottingham are not yet entirely predictable. We need to be sensitive to changes in both the nature and level of demand for the wide range of specialist services that we provide. It is for this reason that we have reviewed, with others, the framework within which we operate. Our conclusions are that, through a clearer definition of the services required and by more accurate measurement of the costs of carrying out our work, we will be better able to manage our resources and thus improve our responsiveness and effectiveness.

Our wider aims involve working with others in the world of conservation to further develop public awareness of the significance of our heritage for the general environment. To do this we must divert scarce resources from our detailed involvement in day-to-day projects and casework. We shall continue to press for outside support for much of this work and encourage direct investment by the construction industry and others to further these objectives. Nevertheless, the proposed transfer of effort from the immediate pressures of our service role to an investment in corporate activities for the longer term has resource implications which are reflected in our priority developments.

The key objectives for the Group over the planned period may be summarised as.

A To implement the recommendations arising out of a review of our management processes.

B To maintain the quality of the work that we do and provide an effective service to our clients in EH by agreeing with them how best to target our resources.

- C To develop and improve the database for the information held centrally in TSG.
- D To disseminate widely the information gained from our own experience, research and development by encouragement, example, training and publication.

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.

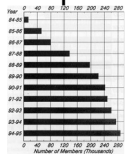


Figure 12 English Heritage membership

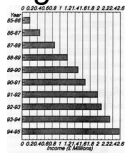


Figure 13 Membership income to 1995