

## English Heritage Peer Review Action Plan and Progress Report

| Recommendations  | Response  | Progress Report  |
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| <p><b>Continuing the reform programme</b></p> <p>(3.1.1) Complete the culture change throughout English Heritage, to ensure more consistent behaviour and approach by staff.</p> <p>(3.1.3) Introduce a Continuous Professional Development programme to sustain current levels of expertise and embed new skills.</p> | <p><b>Agreed</b></p>  | <p>Work continues to complete the culture change. The Management Development Programme has been rolled out to middle managers (nearly 50% trained in 06/07; target date for completion - March 2008). Culture change is being embedded across the organisation through the reinforcement of our organisational values in this and other programmes.</p> <p>The focus on CPD has been strengthened, including mentoring of new specialist staff and co-ordinating future research with corporate priorities. New arrangements were introduced in Spring 2007 to improve internal networking and team working to reflect corporate objectives.</p> |
| <p>(3.1.2) Undertake a de-layering/de-cluttering exercise – a flatter, more networked organisational structure would improve efficiency and simplify complex reporting lines.</p>  | <p><b>Not agreed.</b></p> <p>Following consideration of this recommendation, Commission concluded that, on balance, it would be better to concentrate on building stability for staff and consistency with the outside world, rather than introducing structural changes only two years after the previous restructuring.</p> | <p>To address the issues the Peer Review Team raised about clarifying the roles of the Planning and Development Directors, job descriptions and responsibilities at territory and regional level have been reviewed and revised to better reflect their distinct roles. These will be publicised to ensure they are consistently understood both within the organisation and with our stakeholders by summer 2007.</p> <p>The same opportunity will also be taken to emphasise the role of Planning and Development Regional Directors in engaging with regional partners.</p>   |
| <p>(3.1.4) Explore the introduction of a</p>   | <p><b>Agreed</b></p>  | <p>An outline strategy for Reward, Recognition and Retention will be</p>   |

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| <p>performance-related pay and rewards policy to improve recruitment, retention, morale and performance.</p>   |                      | <p>developed throughout 2007/08. Implementation will be subject to the outcome of the Comprehensive Spending Review, but a revised pay structure is planned by the end of 2007/8 alongside improvements in the working environment, non-financial benefits and opportunities for personal development.</p>  |
| <p>(3.1.5) Develop mechanisms for capturing more 'bottom-up' input, so that frontline staff can feed into policy and strategy at an early stage.</p>   | <p><b>Agreed</b></p> | <p>We have improved mechanisms for capturing input from frontline regional staff on a national basis by more regular sharing of information and by identifying points of expertise in the regions.</p> <p>An annual staff survey has been introduced to improve dialogue with and feedback from staff across the organisation. The first survey was carried out in March 2007.</p>  |
| <p><b>Strategy and balance of roles</b></p> <p>(3.2.1) If English Heritage is to present a convincing case to central government, it must complete its planned system of cost attribution as soon as possible.</p> <p>(3.2.2) Develop an investment and evaluation-based strategy, with a clearly differentiated and outcome-based budget.</p> | <p><b>Agreed</b></p> | <p>A major programme of cost attribution was completed in November 2006 (the <i>Costing the Strategy</i> project). This work has enabled us to review resource allocation and revise budgets to ensure that strategic priorities are as well resourced as possible. <i>CTS</i> also generated a comprehensive methodology for future investment decisions, although some system and procedural refinements will be required as work goes forward. Other projects runs in parallel with this, for example, the SHAPE project (Strategic Framework for Historic Environment activities and programmes) which provides a mechanism for rapid answers to questions about what we are doing and how much we are spending on Research and Standards and policy development to support strategic objectives; and the development of an external investment strategy for the allocation of our grant funds which was considered by Commission in December 2006.</p> |

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| <p>(3.2.3) Agree with government stakeholders a small number of key performance indicators which clearly relate to the effectiveness of English Heritage's core strategy.</p>                        | <p><b>Agreed</b></p>  | <p>A set of key performance indicators has been developed and discussions held with government about embedding these in EH's next Funding Agreement.</p>  |
| <p>(3.2.4) Engage Commissioners more fully in the development and monitoring of English Heritage strategy and priorities.</p>  | <p><b>Agreed</b></p>  | <p>Commission reviewed its role in November 2006 and agreed that:</p> <ul style="list-style-type: none"> <li>○ the Business and Finance Committees will increase their scrutiny roles</li> <li>○ more use will be made of ad hoc committees to deal with specific issues</li> <li>○ Commission will hold a dedicated session to agree what issues it would like to have on future agendas and set aside time at the start of each Commission meeting for in-depth discussion of a single issue or topic.</li> </ul> |
| <p><b>Properties</b></p> <p>(3.2.5) Streamline and group all aspects of property management and promotion, to make the best use of these key assets.</p>   | <p><b>Agreed in part</b></p> <p>Following consideration of the effectiveness of the management structure, Commission concluded that structural changes would not be appropriate so soon after current structures were put in place.</p> | <p>To address the issues the Peer Review team raised it was agreed that closer working should be sought between the departments and that, separately, consideration should be given to how, when commercial pressures are increasing, EH ensures the right balance is maintained between the research and presentation function and investment to support commercial development. Commission discussed this issue in March 2007.</p>  |
| <p>(3.2.6) Create a strategic framework for the property portfolio as a whole, to aid decision-making and resource prioritisation.</p> <p>(3.2.7) Agree a long-term capital investment programme</p> | <p><b>Agreed</b></p>  | <p>A commercial development and investment strategy was discussed by Commission in March 2007.</p> <p>The development of an investment programme beyond 2007/08 is agreed in principle, but actual levels of investment will be subject to the outcome of the 2007</p>  |

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| for the property portfolio – i.e. beyond 2007/08.   |  | Comprehensive Spending Review.  |
| (3.2.8) Produce and disseminate clear guidelines for the use of volunteers – they could provide a valuable additional resource, particularly at lower-profile sites.  | <b>Agreed</b>  | A programme of educational volunteering was launched in autumn 2006. Policy and guidelines were produced in December 2006.  |
| <p><b>Research</b></p> <p>(3.2.9) Develop a shared understanding between government, English Heritage and the wider sector around the overall volume and balance of research – and how it relates to English Heritage objectives.</p> <p>(3.2.10) Develop research projects in partnership with other interested parties, and explore new sources of funding (e.g. DFES, DCLG).</p> <p>(3.2.11) In order to articulate and resource it more strategically, English Heritage’s research should be broken down into that which is:</p> <ul style="list-style-type: none"> <li>- standard-setting;</li> <li>- exemplary; and</li> <li>- casework.</li> </ul> | <p><b>Agreed in part</b></p> <p>(3.2.11) A new classification system will not be introduced at this stage as the EH research strategy, agreed with government, categorises research by EH strategic objective. It would be inefficient to run two systems in parallel.</p> | <p>Through the implementation of the English Heritage Research Strategy, we will continue to improve our responsiveness to the needs of government and the historic environment sector. Consultation will be carried out via regular meetings of the Research Advisory Panel, through annual consultation on EH research plans, and through ongoing work with key agencies and partners.</p> <p>The EH research strategy embeds the principle of working with partners where this will mean research can be undertaken more economically, more effectively and/or across a broader range of subject areas.</p> <p>Work is underway with the home countries heritage agencies to develop a UK wide agreement on historic environment research needs.</p> <p>See also 3.4.4</p> |
| <p><b>Education and outreach</b></p> <p>(3.2.12) English Heritage should change its policy of focusing its education and outreach work on its properties.</p>   | <p><b>Agreed in part</b></p> <p>EH agrees that education and outreach should not be focused solely on EH properties. Achieving this will not, however, require a change of policy.</p>   | <p>The current learning strategy has three prongs</p> <ul style="list-style-type: none"> <li>• improving educational provision at properties</li> <li>• developing curriculum support, informal and family learning plus events aimed at children and adults</li> <li>• working with partners on strategic projects to promote best practice, build audiences,</li> </ul>   |

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|   |               | <p>extend reach and deliver on Government initiatives.</p> <p>English Heritage's Outreach work is developed with community groups around the country and does not focus on EH sites. It is primarily designed to reach people and places not associated with our property activities. In addition, the Outreach team works strategically with sector organisations to extend good practice to all providers. In November 2006 it mounted a major national conference with the National Trust called <i>Your Place or Mine? Engaging New Audiences with the Heritage</i>. This was the first opportunity on a national scale for policy makers and practitioners to come together to debate the issues and share good practice in broadening access to heritage.</p> |
| (3.2.13) There is considerable scope for partnership working to extend the range of education and outreach opportunities.   | <b>Agreed</b> | <p>Both education and outreach benefit extensively from partnership working and the potential exists for more.</p> <p>We are seeking opportunities for new partnerships wherever possible. We reviewed the structure and objectives of the Outreach team to secure closer working with regional planning and development advisory teams and implemented changes at the end of 2006. Nine Regional Outreach strategies were also produced in spring 2007.</p>  |
| (3.2.14) EH has the capacity to educate as well as to entertain, and should ensure it continues to produce resources and publications that cater to its varied audiences – from general interest to academic. | <b>Agreed</b> | <p>Responsibility for the publishing programme has been moved to the Director of Learning. This move includes plans for expanding educational publications in recognition of the educational potential.</p>   |
| <b>Influence: Local Government</b><br>(3.3.1) Central Government,   | <b>Agreed</b> | <p>EH and DCMS, with the support of CLG, will develop a stronger strategic relationship with the LGA</p>  |

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| <p>with English Heritage, should develop a more strategic relationship with the LGA to raise the profile of the historic environment within local government.</p>   |  | <p>to raise the profile of the historic environment with Local Authorities.</p> <p>A joint CLG/DCMS/EH action plan was to be drawn up, in discussion with partners, by the end of 2006, but this was delayed by the restructuring of the LGA. This work is being progressed in 2007.</p> <p>Internally EH has also established a local government programme board to coordinate local authority engagement including preparations for Heritage Protection Review implementation.</p> |
| <p>(3.3.2) Build a closer partnership with local government and professional bodies as part of the expansion of the existing skills and capacity building programme.</p>  | <p><b>Agreed.</b></p>  | <p>A national action plan with central government departments, local government bodies and NGOs to tackle the skills and capacity issues particularly around HPR is being developed and will be formulated by autumn 2007.</p> <p>Also refers to 3.4.3.</p>  |
| <p>(3.3.3) DCMS should consider having a 'heavy-weight' local authority player on the Commission.</p>   | <p><b>Agreed</b></p>   | <p>Lord Bruce- Lockhart has been appointed Chairman designate of English Heritage and is due to take up post on 31 August. He is currently Chair of the Local Government Association.</p>  |
| <p><b>Influence: National and Regional partners</b></p> <p>(3.3.4) Provide the regional directors with more support in their leadership role, by de-layering and streamlining internally and devoting more resource to partnership working.</p> | <p><b>Agreed in part</b></p> <p>As with other proposals for restructuring, Commission considered this proposal and agreed that another restructuring so soon after the last was not appropriate.</p> | <p>Additional support for Regional Directors has been provided by the introduction of regular joint meetings to improve information sharing. Mechanisms are also in place to ensure the co-ordination of regional perspectives to influence EH national policy formulation.</p>  |
| <p>(3.3.5) Do more to get the historic environment on other people's agendas, particularly by capitalising on existing synergies.</p>   | <p><b>Agreed.</b></p>  | <p>This is currently a Strategic Aim of English Heritage, as published in <i>Making the Past Part of the Future</i>, EH's strategy 2006-2010.</p> <p>The objectives which underpin this aim are to</p>   |

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|   |                | <ul style="list-style-type: none"> <li>• Provide better evidence</li> <li>• lead campaigns and national debates to influence policies</li> <li>• engage with key stakeholders on issues affecting, or affected by, the historic environment</li> <li>• identify and cultivate new public and private sector partnerships and sources of funding</li> <li>• develop cross-Government recognition of the value of the historic environment</li> </ul> <p>Examples of work undertaken in support of this aim are:</p> <p>Publishing key reports and information demonstrating the relevance and importance of the historic environment to other agendas e.g. <i>Heritage Counts</i>, the state of the historic environment report which, in 2006, focused on the importance of heritage to communities.</p> <p>The <i>History Matters</i> campaign, run in conjunction with the National Trust and other organisations from the sector, which drew a huge response from millions of people in 2006.</p> <p>EH hosted the first ever European Heritage Summit for the heads of the European national heritage agencies in autumn 2006.</p> <p>Joint policy initiatives with, for example, the National Park Authorities, the South East of England Regional Assembly and the Commission for Architecture and the Built Environment.</p> |
| (3.3.6) Develop a readiness to look outside English Heritage's own budgets to | <b>Agreed.</b> | EH seeks opportunities to work with others in the achievement of its objectives, including through  |

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| <p>meet its objectives – both through commercial and revenue streams, and through more joining up with others who fund similar programmes, research etc.</p>  |                      | <p>joint funding initiatives. For example, the Joint Places of Worship Scheme is run in partnership with the HLF, and the Cathedrals scheme with the Wolfson Foundation; we work with local authorities to help them fund appropriate heritage related posts; research is jointly commissioned with other research bodies and commercial opportunities have been taken with, for example, Usborne publishing. We will continue to seek opportunities to tap into alternative sources of funding and to ensure the strategic impact of our own funds is maximised.</p> |
| <p>(3.3.7) Develop a ‘stakeholder strategy’ at the national level that facilitates the regular and consistent involvement of partners in the heritage sector (and wider cultural sector) at an early stage in the development of policy and programmes.</p>     | <p><b>Agreed</b></p> | <p>A stakeholder strategy that facilitates the involvement of partners in the heritage sector in policy formulation will be developed by the end of December 2007.</p>  |
| <p>(3.3.8) Commissioners should be more involved in promoting partnership and the English Heritage agenda in the regions, for example by working with local and regional politicians and non-Executive members of other bodies.</p>                             | <p><b>Agreed</b></p> | <p>The current arrangement whereby Commissioners are appointed to support particular regions will be extended to ensure each region has a Regional Commissioner. So far, numbers have increased from 6 to 7. Further appointments will be made as opportunities arise.</p>  |
| <p><b>Relationships with Government</b></p> <p>(3.4.1) Establish strategic goals which all three departments want to achieve, and gain agreement on how English Heritage can contribute to them.</p> <p>(3.4.2) Improve joint-ownership of English Heritage</p> | <p><b>Agreed</b></p> | <p>We have established high level meetings with DCMS and CLG to discuss issues of policy and strategy. The first meeting took place in January 2007.</p> <p>Discussion continues with Defra in the context of the developing relationship with Natural England.</p> <p>As a first step towards a new Funding Agreement we will identify</p>   |

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| <p>by DCMS/DCLG/Defra – this could be through joint-sponsorship or a tighter Service Level Agreement, building on the Funding Agreement.</p>  |                      | <p>those areas of CLG and Defra work to which EH contributes. This will be done in time to open discussions on the next Funding Agreement which will come into effect in April 2008.</p> <p>A small group of KPIs has been developed to enable a new less complex and detailed Funding Agreement to be negotiated for 2008.</p> |
| <p>(3.4.3) The successful roll-out of the HPR requires a nationally agreed action plan to tackle the capability gap, through a joint initiative led by DCMS as sponsors of the proposed legislation, involving DCLG, English Heritage and local government.</p> | <p><b>Agreed</b></p> | <p>A national action plan with central government departments, local government bodies and NGOs to tackle the skills and capacity issues particularly around HPR will be formulated by autumn 2007.</p>   |
| <p>(3.4.4) At the most senior level, English Heritage and DCMS need more regular and constructive engagement on strategic policy issues, to achieve a shared sense of direction.</p>  | <p><b>Agreed</b></p> | <p>Joint DCMS/EH meetings attended by senior staff have been set up to meet quarterly to discuss and agree major policy issues, research programmes and areas for joint work. The first meeting took place in December 2006.</p>  |
| <p>(3.5.1) The Review Team recommends that a joint action plan is agreed between English Heritage and the three key departments - DCMS, DCLG and DEFRA, with six-monthly monitoring thereafter.</p>   | <p><b>Agreed</b></p> | <p>This action plan has been produced and agreed with DCMS, CLG and Defra. Progress will be monitored via the Funding Agreement monitoring group which meets on a six monthly basis.</p>  |