

## Historic Environment Scotland Properties and Collections Strategy, Consultation Questionnaire October 2025

### Page 1 - Overview

Historic Environment Scotland (HES) has published a draft Strategy document entitled: [Properties and Collections Strategy: Towards Sustainable Stewardship](#).

This draft Strategy explains how HES plans to care for the Properties and Collections in its care over the long term and why change is needed.

Scotland's historic environment is facing growing challenges, including climate change, rising costs, and a shortage of traditional skills. The Strategy explains how HES will respond to these challenges for the Properties and Collections in its care, make the most of opportunities, prioritise what matters most, and work with communities to protect and use the Properties and Collections in ways that benefit everyone.

The draft Strategy is available for anyone to read and can be accessed here [LINK]. You can also read a [summary version of the Strategy](#).

Our [dedicated webpage](#) has information about the Strategy and consultation, along with answers to frequently asked questions (FAQ's).

To support HES to develop a final version of the Strategy, this consultation has been designed to collect the views and opinions of individuals and organisations that engage with HES and / or Scotland's cultural heritage.

Independent research consortium JRS has been commissioned to conduct the consultation on behalf of HES.

**The consultation is open until Friday 23<sup>rd</sup> January 2026 and the questionnaire takes around 20 minutes to fill in.**

You can complete as many or as few questions as you wish. Please skip questions you do not have a view on or do not wish to answer.

It will be helpful to take a look at the information on the consultation webpage, including the draft Strategy, before completing this survey. However, throughout the questionnaire, for easy reference, relevant extracts from the draft Strategy have been included alongside questions.

JRS work in accordance with the General Data Protection Regulation and the Market Research Society (MRS) Code of Conduct. All responses will remain confidential and anonymous, and no personally identifiable information will be collected as part of this survey.

## Page 2 - Privacy Statement

For the purposes of this survey, Historic Environment Scotland (HES) is the Data Controller of any data you choose to share.

For detailed information on how we process your personal data please see our [Privacy Policy for Citizen Space](#). For the specifics of data processing on this project please see the paragraphs on *personal data requested*, *processing of personal data*, and *storage of personal data* below.

### Personal data requested

We are collecting this data to ensure the voices of Scotland's people are considered during the development of the final Properties and Collections Strategy.

### Lawful basis

Our lawful basis for processing personal data will be pursuant to Article 6(1)(b) UK GDPR where consent for the processing has been provided. By completing these questions, you are consenting to HES processing this information. We appreciate that you may not wish to share personal information about yourself, and there is the option not to answer any of the following questions that may relate to personal data. You can find more details about how we manage your personal data in our [Privacy Notice](#).

### Processing of personal data

The results of the survey will be securely shared with a third-party consultant (JRS) to undertake independent analysis of the responses.

We will process your personal data in strict accordance with the [UK General Data Protection Regulation \(UK GDPR\)](#) and the Data Protection Act 2018. Should you wish to take part in future work or be kept informed, there will be an option to provide your email address.

### Storage of personal data

HES will hold the personal data collected through this survey for no more than the current year plus three years. Information collected through this survey will be deleted from Citizen Space servers after the survey closes; however, it may remain on backup servers for approximately 12 months.

You have the right to access your data, receive a copy of it, request corrects or removal and object to the processing of it. More information about your rights regarding personal data we collect from you can be found at the [HES Privacy Notice](#).

1. Please confirm that you have read the Privacy Statement and consent to the data you provide being used as set out in the statement and in our Privacy Policy.

I have read and agree to the Privacy Statement and Privacy Policy

## Page 3 - About you

2. Are you responding to this consultation as an individual or on behalf of an organisation?

- On behalf of an organisation [Please specify below]
  - Please confirm which organisation you represent: (free text box)

### Society of Antiquaries of Scotland

3. Which of these statements describes your connection, or key areas of interest that link you to the work of Historic Environment Scotland (HES)? [Please select all that apply]

- Fact box - What are the 'Properties and Collections'?
  - The Properties and Collections in the care of Scottish Ministers are a unique cultural asset for the people of Scotland. They are a nationally valuable cultural, social, environmental and economic resource. HES fulfils a stewardship role for Scottish Ministers and the people of Scotland in care for and providing access to the Properties and Collections.

My interest in the work of HES and the Properties and Collections relates to my job

4. If your interest in the work of HES and the Properties and Collections is in relation to a hobby or passion, which hobby or passion(s) are those? [Please select all that apply] [Please skip this question if it's not relevant to you]

N/A

5. Are you a member of any groups or clubs connected with these hobbies or interests?

N/A

6. If your interest in the work of HES and the Properties and Collections is part of a desire to support your local community, are you a member of a community group connected to this?

N/A

7. If your interest in the work of HES and the Properties and Collections relates to academic studies, what is the focus of your academic work? [Please skip this question if it's not relevant to you]

N/A



8. If your interest in the work of HES and the Properties and Collections relates to your job, what is your profession? [Please skip this question if it's not relevant to you]

- My profession is: (free text box)

Director/CEO of a heritage charity

9. Do you work at HES?

No

10. If you have another interest that relates to the work of HES and the Properties and Collections, what is it?

N/A

11. Which of the following council areas do you live in?

Scottish Borders

- If you do not live in Scotland, which country do you live in? (free text box)

But I work in Edinburgh (responding on behalf of a national organisation)

12. Do you live within an island community?

No

## Page 4 - Island communities

### Island Communities Impact Assessment

13. Do you think the Strategy is likely to have an effect on an island community which is significantly different from its effect on other communities (including other island communities)?

Yes [Please explain below]

- Why do you think the Strategy is likely to have a significantly different effect on an island community? (free text box)

There are island communities that have a significant concentration of properties in State Care relative to population, it therefore follows that changes to those properties, collections and archives will have a disproportionate affect on island communities. It is also the case that increased storminess and rising sea levels will disproportionately affect island coasts and the assets on those coasts.

## Page 5 - Vision

Please read the below section about the vision from the draft Strategy before answering the questions.

**The vision** - as presented on pages 3 and 4 of the draft Strategy

**Our vision for this Strategy is to increase understanding and achieve sustainable management of the Properties and Collections in our care.**

‘Understanding’ is a cornerstone of the Strategy, in terms of increasing collective knowledge of the cultural significance and varied histories of the Properties, their associated Collections and supporting archival records. It’s also about better understanding their context – how the Properties are rooted in place – as well as their relevance and value to communities, including intangible cultural heritage. It’s about better understanding potential and looking at things in the round.

‘Sustainable management’ of these cultural assets means caring for them now in a way that will benefit both current and future generations, delivering benefits now without compromising the needs of the future. It means taking a rounded approach to deriving value - social, economic, environmental and cultural - from the assets in our care. Given what we know about how significantly our climate is changing, we have a moral imperative to take a balanced approach to our investment priorities and management.

14. How much do you agree or disagree that this vision is right for the Strategy and for HES to be working towards?

Strongly disagree

15. Do you have any comments on HES's vision as laid out in the draft Strategy?

Yes [Please specify below]

- My comments are: (free text box)

The Society is unsure why there needs to be a separate vision for this (and other) strategies that HES develops/maintains. Surely all the work of HES should be driving towards the HES vision: "We want to make sure Scotland's heritage is cherished, understood, shared and enjoyed with pride by everyone."?

The creation of multiple vision statements can only create uncertainty, confusion and a lack of clarity in the work HES undertakes. Our proposal would be to use the HES vision to guide this work.

The interpretation of the vision as stated - and indeed much of the text throughout the document - seems to have collections and archival records as subordinate to the properties in HES care, indeed the statement suggests that only archival records and collections relating to these properties (here and on page 3) are under consideration despite there being other collections and millions of records in HES care that do not relate to properties in State Care. There is no reference to the National Record of the Historic Environment (NRHE) or to the National Collection of Aerial Photography (NCAP) and it is unclear throughout the document whether collections and archives in this strategy only relate to those associated with properties in care – and even if that were the case, the scale and general definition of what these are.

Page 3 specifically states: "These Properties in State Care, together with their associated Collections and archival records" - does this mean that the strategy will not encompass the large collections of material and archive that does not relate to specific properties in State Care? It is also then unclear when later references are to collections only (e.g. pg 3 "With a different outlook, we can do some things differently and use the Properties and Collections to deliver a great deal more for Scotland.") does this not include the archives?

Pg 8 suggests that the scope of the strategy covers all objects and archival records in HES care, however, page 9 talks about just those archives and collections associated with properties (without providing numbers of assets) so it is unclear which the strategy itself is covering.

This lack of clear definition of the core assets under discussion at any time runs through the entire document and makes it confusing to understand. In the Society's view the needs of Properties in State Care will be different from the artefact collections and the archival resource that HES cares for. It is unclear why they have been included in this strategy document and the Society would advocate for separate strategies for each which can then articulate their specific challenges, opportunities and objectives without need to be tied to the properties.

The introduction of the United Nations definition of sustainable development is anomalous given the vision mentions sustainable management, and the interpretation of this is not the same. This causes confusion – the aims of management need not be the aim of development - the latter tends towards growth, while the former can be considered more towards conservation.

Conservation is only mentioned in the introductory texts and long-term strategic priorities and does not figure in the objectives. The objectives should flow from these long-term strategic priorities and the opportunities discussed in the document, but rarely does the text allow that reference.

Page 3 talks about “a sustainable development approach to investment planning”, while the vision discusses sustainable management – as noted above, these are not necessarily the same. It is one of the reasons that the OPOF strategy opted to prioritise a Wellbeing Economy rather than sustainable development or management. It may be worth considering using this terminology to align with the sector strategy.

Page 4 states unequivocally that “State Care may not be ‘in perpetuity’ as previously assumed” this option is not explicitly explored in later discussion on the strategy and objectives.

Page 4 also suggests that “Every cultural asset in our care has a clear plan”, while commendable, if this strategy genuinely encompasses the entirety of the collections and archives, that is a massive requirement for each and every archive asset for example.

Where the strategy is providing links to contextual documents (on page 6 for example) there should also be a link to the 2014 Act, and later to the National Performance Framework.

On the same page, reference is made to the UN sustainable development goals, but it is unclear how the strategy will, for example, alleviate hunger. If these are to be invoked as a priority for the strategy, then it needs to be clear which UN goals HES is looking to achieve.

## Page 6 - Challenges faced by HES in relation to providing care for Properties and Collections

Please read the below section about challenges from the draft Strategy before answering the questions.

**The key challenges we face in terms of our Properties and Collections are-** as presented on pages 6-7 of the draft Strategy:

- Climate change impacts - accelerated decay, harm or loss of historic fabric and cultural significance
- Condition of the built assets, associated safety risks and the cost of care
- National shortage of traditional and specialist conservation skills and traditional materials

- Critical need for enhanced storage, care, display, interpretation and access to Collections and Archives
- Changing visitor expectations
- Financial constraints

16. How much do you agree or disagree that this list fairly represents the challenges that will be faced by HES in relation to caring for Properties and Collections in the future?

Agree

17. Do you have any comments on these challenges or thoughts on any additional challenges for consideration?

Yes [Please specify below]

- o My comments are: (free text box)

In general the Society agrees with the stated challenges, although additional context could be provided to “financial constraints” which not only include increased costs through inflation but reduced funding due to both inflation relative to government funding and political choices.

Visitor expectations could usefully be amplified to help the reader understand what these are and could be accompanied by an additional ‘changing community expectations’ around the use of properties, collections and archives in State Care, including increased interest in caring for these assets themselves.

An additional challenge is clearly attitude to risk. Page 12 states that “We must mitigate and remove any risks to our staff, contractors and our visitors, resulting in limited public access at sites where potential risks to safety are identified.” There is an ongoing discussion around the appropriateness of this attitude to risk, with other landscape and property managers accepting some risk mitigated through appropriate signage and promotion of personal responsibility.

This page also states the inevitable loss of historic fabric but doesn’t go as far as stating a likely loss of entire sites (especially at the coast), which is a reality in the medium to longer term and should be addressed in this strategy. The same page also makes clear that unroofed properties are at greater risk. These issues could be clearly presented as challenges.

In addition, there is no consideration of how challenges, including changing climate, for example, will affect collections and archives – if the strategy is to encompass these assets they need to be equally addressed.

Page 7 - Prioritisation and effective use of resources

Please read the below section about prioritising resource from the draft Strategy before answering the questions.

**Prioritising of resource-** as presented on page 8 of the draft Strategy

Over and above our core duties, our strategic priorities for the Properties and Collections during the next ten years are to focus on:

- The cultural assets in our care with both the greatest conservation need and the greatest potential to make a difference to people and place
- Scotland's most important cultural assets in a national context, ensuring they are conserved and sustainably managed for future generations

In the short term, we will prioritise the cultural heritage assets in our care where cultural significance and risk of decay and loss are high. We will also protect and grow our income from key income-generating Properties, without compromising what makes them special, to directly reinvest that revenue in the wider Estate.

Our corporate priorities and specific priorities at individual asset level will inform our investment planning for Properties and Collections.

18. How much do you agree or disagree with these strategic priorities for the Properties and Collections, as presented in HES's draft Strategy?

Neither agree nor disagree

19. Do you have any comments on this principle of prioritising, as laid out in the draft Strategy?

Yes [Please specify below]

- My comments are: (free text box)

Again this page is obviously focused on properties in State Care with little to no acknowledgement of the needs of and priorities for collections and archives.

The Society considers that in the face of the previously stated challenges it is appropriate that prioritisation includes "cultural assets in our care with both the greatest conservation need and the greatest potential to make a difference to people and place" and "Scotland's most important cultural assets in a national context".

However, this begs three main questions – how to determine which assets have the potential to make the greatest difference to people and place, how to decide which assets are "most important" when all have a nationally significant designation (except the collections and archives), and what will happen to the assets that do not meet this criteria over the next ten years?

The latter is possibly the most important and must be clearly articulated in this strategy if HES is to be as transparent (and bold) in its decision-making as it sets out to be.

However, the subsequent paragraph to the bullet points setting out these priorities highlights a conundrum: prioritising sites where “cultural significance and risk of decay and loss are high” will include sites that do not provide the greatest potential for people and place, and will, for example, require significant investment to protect against loss to the sea. However, if truly difficult decisions are to be taken, they will necessarily include high risk of decay and loss leading to non-intervention – the cost-benefit calculation indicating that loss of this asset relative to investment in another is the preferred action. If this is the intention, then it should be clearly articulated in the strategy.

### **Opportunities**

The opportunities as currently stated do not generally relate back to the previous text in the strategy and tend to underplay the enormous value of the properties, collections and archives in State Care.

For example, there are clear opportunities to ensure the longer-term conservation of historic fabric by considering the roofing of particular monuments, and there are clear opportunities to present both collections and archives (and indeed properties themselves) in a more accessible way, helping to reduce inequalities and enhance visitor experience.

The Society welcomes the stated opportunity for leadership, something that HES needs to re-acquire through increased trust and investment in relationships with both communities and the heritage sector more generally.

The Society also notes the opportunity to increase external funding through presumably grant applications as well as the stated philanthropic giving. While there is indeed a clear opportunity here for HES, it comes with a very real risk to the rest of the charitable heritage sector which has long been reliant on this resource, a resource which all recent research suggests is reducing. HES would be able to invest more resource into this activity than the rest of the sector put together and has some of the clearest opportunities to deliver incredible results from that philanthropic and grant aided resource due to its larger workforce and nationally important assets. In effect this would leverage the scale and resource of HES into taking a larger slice of a dwindling philanthropic pie for itself to the detriment of the rest of the charitable heritage sector. This would also, if scaled up, potentially cause confusion where HES is awarding grants to organisations that are also chasing the same philanthropic and match funding grant applications as HES itself.

This is not to say that HES, as a charitable body, should not do so, but it should acknowledge the clear risk to the rest of the sector.

Generating greater income also comes with the risk of increasing inequality of access to the resources under State Care as prices to access sites are increased.

The strategy does not undertake any wider risk analysis of the opportunities, or indeed the objectives presented.

Please read the below section about stewardship models from the draft Strategy before answering the questions.

**A New Stewardship Model** - as presented on page 9-10 of the draft Strategy

In the nineteenth century the idea of State Care was created so that important historic monuments and assets could be protected. The core principles of the State Care approach were, and remain today, that care is provided 'forever' and that each monument and asset under State Care is of equal significance.

However, two key issues challenge the value and validity of the State Care approach:

- First: it is generally accepted, and acknowledged by HES, that there is a hierarchy of importance of monuments and assets based on relative levels of cultural significance. In addition, it is acknowledged that some monuments and assets may have more potential to generate social, environmental or local economic benefits.
- Second: social, economic and environmental/climate realities mean that the context within which care must be provided is significantly more challenging now than ever before.

As a result of these issues, HES feels that it is no longer always desirable, necessary or possible to continue to use the State Care approach. Managing change is, at this time, key to providing sustainable care of Scotland's historic monuments and assets. As such, the Strategy moves HES decision making and working practices to a new Stewardship Model which is fit for purpose now and sustainable moving forward.

20. To what extent do you agree or disagree with HES moving from a State Care approach to a new sustainable management approach to caring for Scotland's monuments and assets?

- Fact box - What does 'sustainable management' mean?
  - It means caring for historic places and Collections in a way that balances cultural, social, environmental and economic value. The goal is to make decisions that benefit people today without compromising the needs of future generations.

Agree

21. Do you have any comments about this new Stewardship Model, as laid out in the draft Strategy?

Yes [Please specify below]

- My comments are: (free text box)

In principle the Society is supportive of the stewardship model moving away from strictly fabric only and preservation as found to a more flexible and socially beneficial model where bold decisions can be taken within the framework of current challenges to ensure we preserve representative examples of our heritage into the future in a more sustainable manner.

In setting out that some properties, collections and archives are “so culturally significant in their material form and national importance that we must do all we can to protect them as they are with a traditional conservation approach” it is incumbent on HES to set out how they will determine which assets these are and clearly state their intention to list them.

The Society would advocate an approach that includes voices from all parts of the heritage sector and, of course, the local communities.

While the challenges highlighted the higher risk to unroofed monuments the option to roof or otherwise protect specific sites is not mentioned in the scope for change – as a potentially radical option for some sites it should certainly be considered, alongside traditional lime harling and development of new technological innovations. In this framework, it may be that there are no assets “so culturally significant in their material form and national importance that we must do all we can to protect them as they are with a traditional conservation approach”. For example, if required, HES should consider a roof for Mousa broch.

In principle the Society would support the stated renewed purpose of State Care, but as it currently stands it suggests that this would apply to all the assets, and the strategy has already highlighted the inevitable physical loss of some assets and the potential for other assets to move into another care regime (presumably by communities of interest or other organisations). The purpose needs to acknowledge this somehow.

While the concept of supporting others to “ensure these assets are protected” by supporting others to do so is a positive step (although ensuring protection again obviates the need for any difficult decisions), it is not clear how this would mitigate any of the previously iterated challenges, for example that of costs – how would it be cheaper to support an external agency to protect assets than it is for HES to do so directly?

The Society agrees that State Care may not always be the best way to sustainably manage a heritage asset, however, the way this is described in this part of the document assumes unalloyed protection and conservation for all time – something that the previous discussion in the document has stated will not happen for all assets in State Care, and should presumably therefore also apply to assets in the care of others. It is possible to envisage a scenario where an asset is passed out of State Care on the understanding that the external management will ensure the greatest community and research benefit during a period of managed decline.

In other parts of the strategy examples are given of challenges to be addressed, and the very current issue of church sales would be a specific case that might be mentioned in the context of possible property, collection and archive acquisitions to HES care.

22. Do you think the reasons for HES proposing to move to a New Stewardship Model are clearly presented in the Strategy document?

No

- Please explain the reasons for your answer: (free text box)

Page 12 quotes and references “the art of ‘ancient monumentry’” but with only a vague reference afterward – to be useful this should be fully referenced somewhere in the document, including page numbers, and it is not clear what this means.

The stated concept of “compatible use” or “compatible reuse, adaptation or restoration” is not clearly defined – compatible with what?

### Page 9 - Achieving sustainable stewardship objectives

Pages 12 to 17 of the draft Strategy set out strategic objectives and the actions HES will take to meet them. The objectives are rooted in conservation thinking and practice and encompass wider sustainable development principles.

#### **Our Strategic Objectives:**

- 1) Take a long-term perspective, using lessons from the past to guide future decisions.
- 2) Include sustainable development principles in our planning and management of assets.
- 3) Enhance our response to climate change by adapting our management methods.
- 4) Enhance the productive, sustainable, and appropriate use of the assets we care for.
- 5) Focus on cultural significance by directing our research and innovation where it matters most.
- 6) Increase attention and investment in our Collections and Archives.
- 7) Encourage public participation and collaboration, involving communities in shaping our plans.
- 8) Set a clear direction for each asset by creating specific and proportionate management plans.

23. In general, how much do you agree or disagree that this list of objectives covers the key areas of importance for HES in achieving sustainable stewardship?

Neither agree nor disagree

24. Are there any objectives that you feel need to be added to this list?

Yes

- Other objectives that should be added to the list are: (free text box)

Conservation is only mentioned in the introductory texts and long-term strategic priorities and does not figure in the objectives. The objectives should flow from these long-term strategic priorities and the opportunities discussed in the document, but rarely does the text allow that reference.

Page 4 states unequivocally that “State Care may not be ‘in perpetuity’ as previously assumed” this option is not explicitly explored in the objectives.

Research in all areas of this strategy can be significantly improved and made more efficient through the use of research frameworks – Scotland already has robust research frameworks for archaeology that help to target, prioritise and make more efficient work in the community, academic and commercial spheres. An objective to utilise this resource would be welcome.

The objectives could usefully include direct reference to the OPOF aim to contribute to a wellbeing economy.

It might be of use to transparently consider attitude to risk as an objective.

#### 25. How important do you think each of these strategic objectives is in achieving sustainable stewardship?

- Ranking matrix for each objective - not at all important, not very important, neither important nor not important, quite important, very important

Take a long-term perspective, using lessons from the past to guide future decisions.  
*Neither important nor unimportant*

Include sustainable development principles in our planning and management of assets.  
*Neither important nor unimportant*

Enhance our response to climate change by adapting our management methods.  
*Very important*

Enhance the productive, sustainable, and appropriate use of the assets we care for.  
*Very important*

Focus on cultural significance by directing our research and innovation where it matters most.  
*Very important*

Increase attention and investment in our Collections and Archives.  
*Very important*

Encourage public participation and collaboration, involving communities in shaping our plans.  
*Very important*

Set a clear direction for each asset by creating specific and proportionate management plans.  
*Very important*

26. Please select the TWO objectives you think are most important:

- 3) Enhance our response to climate change by adapting our management methods.
- 4) Enhance the productive, sustainable, and appropriate use of the assets we care for.

27. Why did you select these as the most important objectives?

- I selected these objectives because: (free text box)

Climate change is and will continue to be one of the greatest challenges affecting our lives and the heritage assets of Scotland and should be prioritised. This will also drive the change in conservation principles and knock on effects on various other objectives, such as management plans, public participation, research and innovation. This also aligns with *Our Past, Our Future*.

The Society supports the use of properties in care to train people in traditional skills and support the use of traditional materials, however, we also know that properties, collections and archives can be used to develop expertise in all other areas recognised as main pillars in the Skills Investment Plan for the Historic Environment Sector.

28. Do you have any other comments about the strategic objectives set out by HES?

Yes [Please specify below]

- My comments are: (free text box)

It was noted that the consultation question objectives are not the same text or order as those in the strategy document itself.

*Take the long view, reflecting on the past to inform the future*

The Society is supportive of the long-term view and the concept of using the history of State Care in Scotland to inform the current strategy. However, a lot of this historical work has been undertaken by others, and it should be a relatively straightforward exercise to bring together the existing research, as well as commission any new rapid research. This must not hold up progress on delivery of the strategy.

The Estate portfolio assessment and approach to acquisition and release is surely to be considered in the light of the previous discussion in the strategy document and the Society thinks HES should be more transparent what this means as an objective – looking to release some properties, their associated collections and archive. It is not stated as such in the strategy, but it is clear that additional properties coming into State Care would require a very clear rationale, determined on the same basis as the prioritisation of resources, and attempting to keep up with current concerns (such as church sales or modern buildings). Perhaps there needs to be consideration of a one-in one-out policy or similar, to enable any new properties and their associated collections and archive to be adequately conserved into the future.

While a Collective Stewardship approach in Scotland appears positive, it comes with its own risks given the large number of properties and land now entering or trying to enter

community ownership, again with special relevance for churches. Community ownership and management may only be a short-term solution for some heritage properties, collections and archives because the interest and availability of expertise to manage the assets (often volunteers) has the risk of significantly decreasing over time – many local communities are also faced with multiple properties needing local management, and the volunteer resource to manage this is simply not available.

*Prioritise cultural significance, targeting our research and innovation*

While generally supported by the Society, this objective should broaden the opportunities for not just communities but other research interests to help garner the data and interpretation required to understand a site’s cultural significance.

Again the focus is clearly on properties, but collections and archives can drive significant research dividends if made accessible to wider research interests.

Research in all areas of this strategy can be significantly improved and made more efficient through the use of research frameworks – Scotland already has robust research frameworks for archaeology that help to target, prioritise and make more efficient work in the community, academic and commercial spheres. An objective to utilise this resource would be welcome.

*Increase focus and investment in our associated Collections and Archives*

This objective suggests that the strategy consultation includes all collections and archives, not just those related to properties in State Care.

It isn’t clear in the third paragraph if the last sentence relates to the archives in the previous sentence – if so, it is unclear how these are “dislocated objects”. Is there a suggestion here that archives should be stored alongside collections at properties? HES cares for Society of Antiquaries of Scotland related collections and archives and it has been a longstanding aim to re-connect such material (currently curated across various institutions) digitally, a similar concept can be considered here, and the Society would be keen to explore if that can then also link to our own aims in that sphere through collaboration.

The statement that “Our current storage and conservation facilities are not fit for purpose for the Collections we hold”, while transparent, is worrying and impacts other discussions in the heritage sector around collecting policies and HES links to the treasure trove process.

The Society welcomes the focus on accessibility, but this seems restricted only to future new facilities that may or may not be developed – there should be an emphasis on improving accessibility to current collections and archives – this includes the development of fit-for-purpose digital access to this material. We very much welcome the objective of fit-for-purpose collections storage and care facilities with public access.

In general, the objective focuses only on the materials related to Properties in State Care and does not address the entire collections and archives in State Care.

*Integrate sustainable development to our investment planning and asset management approaches*

The Society has already highlighted the risks for the rest of the sector in increased HES activity in philanthropy, however this is not to say that HES, as an independent charity, should not consider this.

We have already noted the difference between sustainable development goals and the OPOF aim to contribute to a wellbeing economy. The objectives could usefully include direct reference to the OPOF aim.

We support the plan to consider other values in determining priorities for investment, so long as this is done transparently.

It might be of use to transparently consider attitude to risk in this objective (or the succeeding one).

*Embed democratic participation and empowerment, involving people and shaping plans together*

It may be useful in this document to describe what is meant by the Place Principle.

The Society is very supportive of a more outward looking HES co-creating with both local communities and communities of interest; however, as always, given the scale and power of HES there is a need to ensure co-creation efforts are genuinely on an equitable footing.

The Society is very supportive of open and transparent decision-making and community participation (not just local communities, but communities of interest).

*Strengthen our response to climate change and its impacts, adapting our management approaches*

The Society recognises the importance of stating that “acceptance of some loss of historic fabric may be necessary” given the challenges and need to focus resources. Without recognising this we face the potential incremental loss of much more as resources are spread too thin across the properties, collections and archives held in State Care.

We would support bold evidence-led decision-making in terms of conservation principles and, specifically for example, the reinstatement of roofs on some properties.

*Increase productive, sustainable and compatible use of the assets in our care*

The Society supports the use of properties in care to train people in traditional skills and support the use of traditional materials; however, we also know that properties, collections and archives can be used to develop expertise in all other areas recognised as main pillars in the Skills Investment Plan for the Historic Environment Sector. This strategy needs to recognise and prioritise these too.

*Set a direction of travel for each asset, developing clear and proportionate plans*

This is a crucial part of the strategy where it is made clear that loss will occur on some sites through choices made by HES (and others). The Society understands that difficult choices

will need to be made, and welcomes a transparent and evidence-led decision-making process. It could be in this section that consideration of innovative or bold proposals for properties, collections and archives could be highlighted.

## Page 10 - Markers of success of the Strategy

Please read the below section about markers of success from the draft Strategy before answering the questions.

**Markers of success of the Strategy-** as presented on page 18 of the draft Strategy  
This Strategy aims to bring positive change over the long term. If we achieve this, success will be demonstrated by reaching the 'desired future state' for management of our Properties and Collections, over the lifetime of the Strategy:

- Every cultural asset in our care has a clear direction of travel and a plan, set within local, regional and national contexts, leading to sustainable investment and management
- Decisions about Properties and Collections are transparent, data-led and expertise-informed, considering a broad range of values and potential outcomes
- Local communities, colleagues and partners are actively involved in shaping the future of our Properties and Collections to identify and achieve shared goals
- Resources are allocated based on clear strategic priorities and investment decisions lead to long-term benefits
- Properties and Collections are actively used for training people in traditional skills and supporting the use of traditional materials
- Innovative governance models, community participation and local wealth building are achieved through asset management, procurement, and partnerships
- Conservation management encompasses the realities of climate change, and we find new ways to adapt, build resilience, enhance biodiversity, and reduce our carbon emissions
- Visitor experiences are enriched through improved access, interpretation and engagement, ensuring that places are welcoming and relevant to diverse audiences
- We foster a culture of collaboration, openness and innovation, where colleagues are empowered to drive change and overcome internal barriers to progress

29. Please tick the THREE 'markers of success', as listed below, you feel are the most important:

- Decisions about Properties and Collections are transparent, data-led and expertise-informed, considering a broad range of values and potential outcomes
- Resources are allocated based on clear strategic priorities and investment decisions lead to long-term benefits
- Conservation management encompasses the realities of climate change, and we find new ways to adapt, build resilience, enhance biodiversity, and reduce our carbon emissions

30. Are there any 'markers of success' that you feel need to be added to this list?

No comments

- Other 'markers of success' that should be added to the list are: (free text box)

31. Are there any of these 'markers of success' which you feel HES will struggle to achieve?  
[Please select all that apply]

- Every cultural asset in our care has a clear direction of travel and a plan, set within local, regional and national contexts, leading to sustainable investment and management
- Local communities, colleagues and partners are actively involved in shaping the future of our Properties and Collections to identify and achieve shared goals
- We foster a culture of collaboration, openness and innovation, where colleagues are empowered to drive change and overcome internal barriers to progress
  - Please state why you feel HES will struggle to achieve this/these 'markers of success': (free text box)

The scale of both collections and archives will make it difficult to achieve a clear direction of travel and a plan for every cultural asset in HES care.

The current climate around leadership in HES will make it difficult to cultivate the types of collaboration and trust, both within and outside the organisation, that allows both a culture of openness and active participation on an equal footing.

32. Do you have any other comments about this list of 'markers of success' that HES states need to be reached through implementation of this Strategy?

No comments

- My comments are: (free text box)

## Page 11 - Conclusion

33. Considering the Strategy as a whole, how much do you agree or disagree with the approach being proposed by HES for sustainable stewardship of the assets under their care?

Agree

## Page 12 - Environmental report

You can read the Environmental Report here [LINK].  
Please skip this section if you do not wish to read the report.

34. Has our environmental assessment identified the likely environmental effects of the options?

- Yes
- No
- Unsure

35. Do you think there are any additional mitigation, enhancement or monitoring measures that should be considered?

- Yes [Please specify below]
- No
- Unsure
  - The additional mitigation, enhancement or monitoring measures that should be considered are: (free text box)

36. Do you have any other comments on the environmental assessment?

- Yes [Please specify below]
- No comments
  - My comments are: (free text box)