

Heritage Values: The Current Role of Management Information in the UK Historic Environment Sector

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Abstract

This paper undertakes a holistic reflection on the reasons for the establishment of the value of heritage in the UK, focusing on Scotland and England, and also the management contexts which are driving these developments. Robust management information systems are now seen to be a prerequisite in providing proofs or justification for government support for the heritage – and establishing values are a current part of those proofs. The ways in which we arrive at such values is difficult when we are only just beginning to organise and understand the stuff of heritage management though: data and information exists, but it has never been sorted or analysed to its best potential use. The paper reviews those management fundamentals which can provide data for basing policy on. It does this by looking at the emergent recognition of need for a management information system for the heritage sector, and how heritage agencies in different parts of the UK have responded to that need.

Keywords

Historic environment reporting; value; heritage policy review.

The Relationship between Heritage and Management

Texts which have passed the test of time on the bookshelf of those interested in the processes of heritage management tend not to be management texts per se. It is most likely that the classic works cited are those of scholarly value, considering the role of the past in today's society, or polemic treatises reviewing the actions or attitudes of the public or government in regards to a national identity expressed through treatment of the material remains of the past. Those classics oft cited include the authors (for it is the author's views which underpin the volumes): Hewison (Hewison 1987); Lowenthal (Lowenthal 1997, Lowenthal 1985, Lowenthal, Binney 1981); Samuel (Samuel 1988, Samuel, Light et al. 1994); Fowler (Fowler 1992); and Wright (Wright 1991, Wright 1985, Wright, Dorset 1995). An author which may possibly be cited in future, might be Ascherson (Ascherson 2002). Heritage management or cultural resource management

texts and edited collections have tended to be of the moment considering particular case studies or regional issues, or where as thematic volumes, having potentially a limited or specialised audience. They appear relatively frequently, though some, such as (Cleere 1984) might be considered as 'classics' in this field. Relevant works that might be included in these categories include: (Aplin 2002, Ashworth, Howard 1999, Cleere et al 1988, Grenville 1996, Hall, McArthur 1998, Hall, McArthur 1993, Harrison, Association of Independent Museums 1994). The Getty Conservation Institute in Los Angeles has also produced a series of occasional papers looking at particular aspects of heritage management, such as value (De la Torre, Getty Conservation Institute 2003), and the International Journal of Heritage Studies provides an academic forum which published papers covering both research and practice. Within the United Kingdom, the most recent publications containing valuable methodological and assessments of the heritage resource have come from public agencies involved in the care and preservation of the resource, including notably (English Heritage 2000) and (DCMS 2001) considering the development of policy in England, and (Clark, English Heritage 2001), considering the philosophy behind daily decisions taken in conservation management. Overviews of differing aspects of the heritage sector in the country have been produced by the Heritage Lottery Fund, as precursors to directing lottery grants (Heritage Lottery Fund 2001), whilst non-governmental groups such as Heritage Link have produced reports to support particular causes and political arguments for support (Catling, Heritage Link 2004).

Despite a healthy publication record however, the disciplines of heritage and the management sciences have not engaged in a full dialogue which might have produced a good understanding of the processes of management as they are applied within cultural resource management. Publications cited above consider the effects of management of the heritage, including the influences on management: but hitherto there has been little consideration of the role of strategy and process in heritage management decision making, and far less analysis of the internal mechanisms within organisations responsible for heritage management decision-making. This has left what has become a widening gap in the effectiveness of the heritage sector in the United Kingdom to manage its resources strategically, and also its ability to argue for greater public investment (in the form of Government grant-in-aid), or more widespread mass public support. Heritage has thus in recent times been at the mercy of the leader writers suggesting that public cash is supporting 'toffs in trouble', (where conservation maintenance grants for country houses are concerned), or that sites are managed by the few for the few (i.e. representative of the culture of the socially elite) rather than providing an enriching cultural experience for all. Regardless of the politics of journalists involved, the majority of stories report on the sector bemoaning a lack of funds and ability to carry out its duties (Akbar, Bloomfield 2004, Kennedy 2004, Brooks 2005, Reynolds 2005).

Whilst the heritage sector in the United Kingdom spent the 1980s and most of the 1990s bemoaning both its position and fate, tourism (the major user of the heritage resource through visitor attractions) was seeing major growth – trading on the image of Britain overseas as a destination renowned for its heritage and cultural attractions. This obvious 'value' of heritage was not properly picked up on within the sector, at the same time as other disciplines and sectors, most notably the countryside and environment lobby, had picked up on the notion of measuring value to its benefit, as well as promoting internal management development of the sector. With a change in Government and political persuasion in 1997 in the United Kingdom, the socialist

movement swept to a landslide election victory on a ticket of social justice, sustainable development, inclusion and education. With a healthy economy, buoyed by developing service industries such as tourism, the notion of value came to the fore in both public service and private entrepreneurship therefore, but the heritage sector found itself left behind repeating oft-used and ignored pleas for help. The overt political aims of social inclusion, economic regeneration, sustainable development and educational inclusion were tapped into quickly by the environmental sector, as they had already (perhaps as a result of their scientific focus) been measuring and assessing the state of the environment amongst other areas (Countryside Agency 2000a, Countryside Agency 2000b). Additionally, the environment sector had capitalised on its media coverage and interest, something which the heritage sector had not yet done effectively.

It was therefore a combination of external factors, influences and competition for attention which raised the recognition of “value” being an important hook on which to hang both advocacy and development for the heritage sector. Where other interests were articulating their relevance to the roles the public service was expected to play by Government, it was the fundamental lack of a strategic focus (and lead), as well as effective management information at the end of the 1990s, which were holding the sector back from getting its message across. Heritage in the modern world was in danger of being seen as an anachronism. A number of reasons can be cited excusing the sector for these fundamental problems: there is little doubt that the sector has limited funds (seen in the form of a ‘conservation backlog’); also that the sector is made up of disparate small organisations; thirdly, that the sector relies on volunteer effort; fourthly, that the sector cannot ethically bring itself to put commercialism above conservation. However, on closer examination and comparison, it can be seen that a closely allied sector, that of museums, galleries and archives also has the same issues to deal with, and when attention is turned to the external sector already mentioned, that of the environment and countryside lobby – it too has had equivalent issues to contend with in addition to agricultural industry decline (Countryside Agency 2000a). Again it is worth stressing that it was the lack of an understanding of the processes of management within organisations, as well as a lack of holistic understanding of the value of the heritage sector that was causing ongoing structural and perceptual problems. Notions of value had already been explored within the sector (Scanlon, Edge et al. 1994, Hardesty, Little 2000, Carman 1993, Allison, Dept. of National Heritage et al. 1996) though these studies were limited in scope and were seen as specialised research tools. It is only in the last 4 years, since an understanding of value has provided the key for establishing the significance of heritage in different fields that the sector has learnt from what others have already been successful at doing, including the use of economic modelling. Thus there has been seen a sudden appearance of studies of value within the heritage sector (De la Torre, Getty Conservation Institute 2003, Catling, Heritage Link 2004, NERA 2003, Navrud, Ready 2002, Baxter, English Tourism Council et al. 2001)

It is interesting to note that the comparable museums sector has been developing a similar strategy in establishing the value of the sector for the Government and its wider public support. To a large extent it is moving in tandem in this exploration of value, and is drawing on sources of information and research which are shared across the cultural sector in its widest sense. That being said, the museums sector has a longer tradition of writing about management within its institutions (e.g. Hooper-Greenhill 1994, Merriman 1991, Walsh 1992), and came better prepared for articulation of value (Resource: The Council for Museums, Archives and Libraries 2001, Council for Museums, Archives and Libraries 2000). Indeed, through the Clore Leadership Foundation, the museums sector

has a dedicated strategic management training resource, not seen elsewhere in the heritage sector (Hewison, Holden 2002).

Understanding the Stuff

It has been established above that the two key problems for the heritage sector in the UK at the turn of the century was that management was not a concept which was fully engaged with in the sector, and the significance of heritage to wider society was not understood or articulated effectively. The underlying reason for this can be found in the hybrid nature of the heritage sector in the UK: there is no clear definition for the sector, which frequently can be found under the auspices of more general cultural policy, nor is there necessarily agreement on the actual 'stuff' of heritage. This is not the forum for a philosophical exploration of this, as these issues have been raised in other locations recently (Howard 2003, Graham, Ashworth et al. 2000). However, it is worth reiterating that the arts sector is relatively well defined, as are museums, galleries and archives, where creative expression, objects, artistic representation and documents respectively sum up the 'stuff' of the sector. Heritage presents a tougher challenge when defining its physical expression. Archaeology or historic buildings are but a sub-sector and neither articulates effectively the breadth of heritage in the everyday world around us. This is one of the reasons for the coalescing within the UK of heritage professionals around the newer umbrella term of the 'historic environment' (Baxter 2004) in an attempt to make the sector sound more 'inclusive'.

With the sector in recent years having potentially 're-defined' itself, positioning itself in relation to the more clearly defined other sub-sectors of culture mentioned previously, a need was identified for the sector to undertake some form of assessment, auditing or measurement to understand the consequences of its management. In essence, the historic environment sector in the UK was finally treating its role as a steward of resources, and thus relating more closely to the principles of cultural resource management, a term understood in other parts of the world but not widely used in the UK (Cleere et al 1988, King 1998). Reasons for measuring the resource might have been easy to distinguish: it is an accepted fact that the large parts of the historic environment and the process of conservation suffers from 'market failure', i.e. Public Agencies have a civic duty to protect the historic environment for the benefit of all, accepting that in the majority of cases there is no tangible economic return on investment. Measurement would have provided other evidence to show a return on investment through processes such as enhancement of quality of life, regeneration, social inclusion and so on (NERA 2003). In recent years in public administration the effectiveness of this has been measured in the UK using 'key performance indicators'. Each of the areas already flagged up by the Government as thematic groupings for priority action would aid advocacy for the sector. However, it can be seen that there was an initial reluctance to engage in such measurement and auditing, as arguments continued to be aired that the sector was too busy carrying out frontline conservation, either providing access to sites or propping up the resource. Even within the major public heritage agencies, the role of the heritage professional was seen as being driven by sectoral needs rather than strategically managing sectoral response.

Millennial Crunch Points

Auditing and measurement of value at its earliest points were seen as backroom tasks, serving management for its own sake. Strategic or corporate planning had fallen from grace as public organisations strove to be proactive and responsive to a public – so much so that English Heritage disbanded its Central Planning Office in one of its internal reorganisation in the late 1990s. Strategic thinking for the sector could however only come with an embracing of the philosophies of management and strategy- and thus can be seen as the new Millennium dawned, tension throughout the sector. Perhaps surprisingly there was no single ‘crunch point’ or crisis which changed attitudes towards the role of management since 2000. It was a culmination of growing professionalisation within the historic environment sector (Baxter 2004); tensions tied up with a Government frustration at the sheer number of public agencies it was supporting within the cultural arena, as it entered its second term of office looking for efficiencies and delivering fully on political ideals; an external tourism industry, providing the main earned income stream for heritage, being hit by terrorism and environmental issues; devolution of Government within Wales and Scotland, and a corresponding upsurge in issues of culture and identity; and a suddenly increasing public appetite for history and heritage television and print media.

A raft of new performance measures for local authorities; comprehensive spending reviews on a rolling 3-year basis by central Government; local level democracy asking questions of the cultural services being provided; and a tourism industry that has been thoroughly shaken up in quality and structure thus created the conditions for the application and need for engagement with the management sciences, economic theory and product benchmarking. It is therefore suggested that the historic environment ‘resource’ can be said to have quickly come of age since 2000, and the last 3 years in particular have seen a maturing of processes and structures within the sector. What thus has been seen as a fundamental tenet of historic environment management in the USA and Canada for many years is now being applied in the UK: *resource management*.

If, as has been suggested, a point of no return has been reached, the current fit of the sector with its political, social and economic environment must be considered albeit briefly. The thinking behind evidence-based policy making within Government has been cascaded down into heritage organisations, recognising that protection of heritage for its own sake does not stand up to justification in the eyes of formal Government measurement (HM Treasury 2003); heritage in its most formal sense does not fit politically with the current Government (DCMS 2002); and the tourism industry in order to compete in a globalised industry has higher requirements for a visitor experience than may previously have been provided by heritage sites (Leask, Yeoman 1999). The real ‘crunch point’ if one is to be found has therefore been the need to provide evidence quickly to prove that the sector is aware of its own needs, can justify them, and can justifiably establish the role it plays in relationships with Government (the main sponsors of heritage protection), society (the stakeholders in the historic environment) and industry (tourism and other users/promoters of the heritage resource).

Those relationships must be built and maintained on the basis of a solid information source and evidence base. It may therefore be suggested that the sector’s first shared major challenge was to deal with the concept of common management information. Structured information and data on which analysis and subsequent strategy can be based provides a deeper understanding not only of the ‘stuff’ of heritage, but also the

processes which the resources go through as a result of management action (Baxter 2002, Baxter 2003). Such management information has long been available within the environment and arts sector, as already considered. This concept has gained credence, albeit without being given such a prescriptive title as a management information system, and the potential uses of it, especially in the devolved political context of Scotland, can be seen. Heritage management information, rather than information about the heritage thus gained currency, and the ability to use 'bite size' pieces of information for a number of advocacy purposes drawn from a common 'pool' of data collection which all major heritage organisations have put their weight behind is beginning to be recognised as being able to push the right political buttons with the right supporting messages about the state of the resource.

The Value in Management Information

The above presents a very broad contextual review of the heritage sector and its engagement with management and management information for the purposes of establishing the sector's significance. Understanding the implications of this, and also the interaction between management and heritage still remains at a basic level however: it is therefore appropriate to consider the process through which value and significance is being established, and also to help shape a vision of a management information resource for heritage in the UK. The latter is of particular importance, as the last 3 years have seen a rush to justify support for the heritage through one particular mechanism, the 'State of the Historic Environment Report' (English Heritage & Historic Environment Review Executive Committee 2004), whilst further strategic uses of management information in the sector (providing sustainability for investment in such processes) have yet to be clearly established.

Value must be defined in terms of whether a cultural resource is seen as being a public or private good. The characteristic of 'excludability' determines the level of access which is available to the resource, i.e. whether more than one person can enjoy use of the resource at the same time (Navrud, Ready 2002). Public good can thus be determined from this characteristic and from this, a public agency, such as the Treasury (which allocates Government spending within the UK) can then apply measurements of value and determine the level of market failure the resource suffers from or conversely the level of public intervention required to maintain a public service/resource (HM Treasury 2003). The need for detailed appraisal undertaken within the heritage agency to which money has been devolved from Government, thus both justifies public expenditure on this particular heritage stream, and on the other demonstrates the range of benefits which expenditure accords the resource: need and benefit (Navrud, Ready 2002, Urban Practitioners 2005). Recent work (NERA 2003) has considered the various monetary (economic return on investment) and non-monetary (value of life) benefits and therefore values of the resource within the specific heritage context of England. This, along with the appointment of dedicated economic expertise within the public heritage agencies, builds on work which crosses over from the environmental sector, as already discussed.

Historic Environment Reporting Mechanisms: Comparing English and Scottish Developments

There is no need to consider further the detail of actual valuation techniques here, as consideration is given to the holistic understanding of the value of the management information to the sector as a whole. References cited above, along with (Heritage Lottery Fund 2004, Office of the Deputy Prime Minister 2004, London School of Economics 2004, Office of National Statistics 2001), all appearing in the last 3 years identified above expand on the range of valuation methodologies. Development of historic environment reporting within England and the hypothesis that it has formed the genesis of an approach to management information has also been established elsewhere (Baxter 2004, Baxter 2003). The 'Heritage Counts' process in England is now in its fourth year, and the ascription of heritage value in different contexts has driven the format of the reporting along thematic lines. The supporting research process is therefore now becoming well developed here to support development of a broad evidence base of management information (English Heritage & Historic Environment Review Executive Committee 2004, B. Cowell, pers.com.). Over time as the co-ordinated sectoral evidence base grows, it is hoped that further cross-referencing of data and 'drilling down' of analysis will provide enhanced strategic decision-making capability provided that management information and knowledge management is adopted as a core concept within sectoral organisations.

The 'Heritage Counts' process within England although flagged as a process driven by the sector, results from the interplay between advocacy work of English Heritage, lobbying the Government for greater support, and the Government's Department for Culture, Media & Sport's desire to develop capacity within the heritage sector and rationalise complex support mechanisms for it. The publication of the 'Power of Place' report (English Heritage 2000) which represented the results of a large-scale consultation and scoping exercise on the overall management context for the sector was facilitated by English Heritage – but ultimately written by English Heritage. The Government's response was published in the form of policy direction (DCMS 2001). These pivotal reports which prompted Heritage Counts may be seen very much as a top-down approach, based on the perception at senior policy level that strategic direction was lacking in the sector. Despite the historic environment reporting process being well underway, there still appears to be a perception (mistaken or otherwise), that top-down intervention is required to drive the sector forwards (Brooks, Editor 2005, English Heritage 2005).

Within Scotland, a different scenario can be found due to the structural differences between the Government's heritage agencies north and south of the border. Within England, English Heritage has been able to facilitate and co-ordinate the sector to drive forward historic environment reporting because of its status as a quango (i.e. independent of Government). English Heritage thus has the ability to act as an advocate for the historic environment and as an advisor on Governmental heritage policy. In Scotland, the national heritage agency, Historic Scotland, is an Executive Agency, and part of the Scottish Executive. As the branch of the civil service which sets and implements policy for Scottish Ministers in the heritage sector, it cannot act independently on advocacy for the historic environment.

This raises an interesting variation in the scenario and need for creation of strategic management in Scotland, as the actual heritage sector, in non-governmental terms, is

far smaller and operates with much less capacity (in both staff and resources). Scotland furthermore, has a more polarised geography/demography, with small dispersed settlements outside the central belt (Edinburgh - Glasgow) and an economy dominated by tourism, which as an industry is itself dominated by the heritage visitor attraction offering which is spread right across the country. There are other broader issues which tie heritage and Scottish identity perhaps closer than is found within England (McCrone, Morris et al. 1999): an 'environmental scan' for the heritage sector (a simple version of which is shown in Diagram 1) shows that the resource and management of it is often an emotive issue, but ill understood; the historic environment is competing against wider Governmental priorities which are for the most part at the devolved level concentrated on acute socio-economic problems; there is a long history of intervention by the public sector across Scotland in provision of a range of services; and Historic Scotland as a Government Agency within Scotland cannot champion the cause of the historic environment above other Scottish Executive issues.

Diagram 1: Simple 'Environmental Scan' for Development of Historic Environment Reporting in Scotland



Bringing the management of the Scottish historic environment into focus: there have been common calls for action on various issues since a coalition of non-Governmental organisations (NGO) investigated the historic environment and published a report in 2001 with a clearly defined agenda (Table 1). This report started an advocacy campaign co-ordinated by a dedicated sub-committee of an umbrella NGO, Scottish Environment Link, which had an eye to developments south of the border in England, and also on the devolved political imperative in Scotland to develop the cultural identity of the 'new' country.

Table 1: A Ten Point Plan for our Historic Environment
(Fenton, Swanson et al. 2001)

<p>The three bodies responsible for steering the production of the Scottish Environment LINK Historic Environment Audit¹ devised a Ten Point Plan of Action which would substantially improve the way we look after and benefit from our heritage. These points were re-examined by representatives of a wider group of bodies², and some of the 10 points refined to produce the points below. There was universal agreement that the first of these points is the most urgent; details of the others are currently being prepared. We intend to work in partnership with others in Government and the Voluntary Sector to take these plans forward:</p> <ol style="list-style-type: none"> 1. There is a clear and pressing need for a major independent review of the way we care for the Historic Environment in Scotland. 2. It should become a statutory duty for local authorities in Scotland to maintain, resource and staff a Sites and Monuments Record, or expanded 'Historic Environment Record'. 3. The Historic Environment should be recognised as a core part of our lives, and must be considered by government as a key issue in Sustainable Development in Scotland. 4. The importance of our historic sites, monuments, landscapes and buildings should be given much more prominence in the Education of our children, and in Lifelong Learning for all our citizens. 5. All construction industry activity for new building, rebuilding and repair should be normalised at 5% VAT. 6. There is a need to identify and agree strategies which will lead to increased resources for the understanding, preservation, research, and increased access for place, monument and structure. A review is needed of the whole range of procedures (including accrual accounting) relating to fiscal and financial arrangements for the historic environment. 7. The European Landscape Convention should be applied to Scotland, recognising the value of our historic landscapes to our sense of place and quality of life, and taking account of our lack of knowledge and understanding of landscapes, and of the major forces for change that they face. 8. The economic value of the Historic Environment needs to be recognised and developed across the range of impacts and opportunities. 9. Investment in training and development of best practice is needed for historic environment professionals and for all others whose work has an impact on the resource. 10. Greater liaison and partnership is needed within the professions - both between central and local government, practitioners and voluntary bodies - and cutting across disciplines and interests in all areas of government. <p><i>1 Representatives of the Society of Antiquaries of Scotland, the Association of Regional and Island Archaeologists, and the Council for Scottish Archaeology comprised the Steering Group for the Scottish Environment LINK Historic Environment Audit (Scottish Environmental Audit No. 4, 2001).</i></p> <p><i>2 The following bodies were represented: Architectural Heritage Society of Scotland, Association of Regional and Island Archaeologists, Council for Scottish Archaeology, Garden History Society, Institute of Field Archaeologists, Institute of Historic Buildings Conservation, The National Trust for Scotland, Royal Incorporation of Architects in Scotland, Scottish Civic Trust, Society of Antiquaries of Scotland.</i></p>

The action plan noted in Table 1 formalised the NGO voice of the historic environment in Scotland, noting three hurdles that needed to be overcome to advance the cause of the sector: firstly political will; secondly revision of sector structures and capacity; thirdly establishing the evidence base. A 'bottom up' approach to the development of management information was adopted in Scotland because of policy factors already mentioned and the tradition of NGO co-working on issues of common interest. Indeed, allied to the Action Plan published in 2001, the emergent Built Environment Forum Scotland (a sister organisation to Scottish Environment Link) established as its first taskforce, the Historic Environment Review Taskforce, as a shared group with Scottish Environment Link. Table 2 shows the incremental development towards formalised historic environment reporting and the role of the NGO sector in attempting to drive policy.

Table 2: BEFS "Bigger Picture" Campaign Timeline (Built Environment Forum Scotland (Historic Environment Review Taskforce) 2004) [Updated to April 2005]

<p>The Background to our campaign</p> <p>'The Historic Environment' is all around us. It is both the special monuments and the everyday features that have developed through human history. It is the evidence that people have left behind of 10,000 years of living in Scotland. It includes everything from archaeological remains to great castles; from terraced houses to ornate gardens. From the mid-1990s it has become increasingly clear that these things are too often being taken for granted, so a very basic audit was commissioned by what has become the LINK/BEFS Historic Environment Review Taskforce (HERT). This was the beginning of the long journey that has resulted in the Bigger Picture campaign.</p> <p>May 2001: Launch of the Historic Environment Audit, plus the 10-Point Plan of action, the first and overarching point being: 'There is a clear and pressing need for a major independent review of the way we care for the Historic Environment in Scotland.'</p> <p>October 2001 Meeting of many of the main Scottish organisations concerned with the care of the Historic Environment. Endorsement of the action points in the 10-Point Plan, and mandate for the Taskforce to take this forward with the Scottish Executive.</p> <p>June 2002 HERT meet Elaine Murray, Deputy Minister for Tourism, Culture and Sport. The Minister agrees that Historic Scotland and HERT should begin a dialogue to scope a review.</p> <p>June 2003 First meeting of the Historic Environment Advisory Council for Scotland (HEACS), a Ministerial advisory group. One of their five initial tasks is to investigate whether there is a need for a 'heritage audit'.</p> <p>November 2003 HERT and HEACS meet to discuss how to help each other. HERT agree to organise background research to feed into Scoping Meetings to look at the nature and extent of a Review/Audit.</p> <p>February 2004 HERT hold three Scoping Meetings, each with around 25 participants, to look into the main issue surrounding the Historic Environment and People, Values and Managing Change: results posted on BEFS website in March.</p> <p>May 2004 Announcement of Culture Commission which will review Scottish culture, including passing mentions of heritage in its remit.</p> <p>June 2004 After extensive consultation, the advocacy document The Bigger Picture is launched in Edinburgh, promoting a strategic Scottish Historic Environment Auditing Framework and State of the Historic Environment Reporting.</p> <p>June 2004 HEACS due to release their draft findings to Stakeholders in order to elicit views before finally reporting to Ministers.</p> <p><i>[October 2004] HEACS publishes report on need for a heritage audit in Scotland</i> <i>[March 2005] Historic Scotland confirms Ministerial policy directions for the historic environment to be announced during 2005 at BEFS seminar</i> <i>[April 2005] Ministerial response to HEACS report still awaited</i></p>

A factor identified in the environmental scan (Diagram 1) which is also notable is the role of the Governmental advisory body, the Historic Environment Advisory Council for Scotland, charged after establishment in 2003 of as one of its tasks to establish the need for a heritage audit. It reported its findings in 2004 (HEACS 2004), noting both a need and also a structure for reporting. It frames the need firmly in the political arena as seeing a threatened historic environment (ibid., 6) marginalised within cultural policies in Scotland. However, recognition of this process as forming the basis for strategic management information is acknowledged strongly within the body of the recommendations: 'Audit should be seen as a multi-purpose tool; as providing an information base for the historic environment; as a device for monitoring changes in the historic environment, as a methodology for assessing pressures within the sector and as a process for identifying patterns and trends. ...there is an urgent need for an Audit in order to develop the formal management information processes which require to be introduced in order to bring purpose and direction into the sector. Audit should be seen as providing the basis for the creation of a strategic vision...' (ibid., 12). The vision shown in this report prior to actual audit being undertaken in Scotland is a result of both the timeline and reflection on the English experience, and perhaps a realisation that the reporting being undertaken in England is yet to make its strategic intent clearly explicit. It thus articulates that understanding of the role of management, and the role of information in management is beginning to dawn on the sector, but this needs to gather pace quickly to fulfil external (not least Government) expectations of the sector.

Concluding Remarks

There is no doubt that historic environment reporting produces useful evidence for policy and strategy development: this has already been seen to good effect within England. The embedding of the process within the sector is however at too early a stage to gauge the net effect on enhancing or improving policy-making. Anecdotal evidence from the equivalent developments for the museums and galleries sector, suggest that such a process is however likely to produce positive effects. One drawback is the substantial associated costs for the policy development process – and this is why the benefits of management information must be articulated as quickly as possible to all stakeholder groups. There is widespread belief inside the sector that resources are in short supply; there is also long-standing inbuilt suspicion of management processes, where those processes potentially have a cost which may compete for internal organisational funds with so-called 'frontline' conservation work (Baxter forthcoming). It is estimated that production of the 'Heritage Counts' report in England costs approximately £250k per year (Baxter 2003); the size of this sum has raised eyebrows in certain quarters of the sector. A figure for a reporting framework within Scotland has been estimated to be of the order of £140k per year with additional indirect costs to support the management research process of a further £100k per year (the latter figures are not accounted for within the English figures) (HEACS 2004). Unrest over the size of the figures being mooted for Scotland (which is inevitable given the smaller size and capacity already discussed) is pre-empted by HEACS, as it comments that, 'believes that the investment of the required funding is justified on a cost-benefit basis since continuing to expend large sums in the heritage sector in the absence of factual data cannot be acceptable. Continuing to work in an informational vacuum cannot be regarded as a rational procedure' (ibid., 11).

The rationale for the management information and the evidence base has therefore become clear within the past three years for the sector; exploration needs to now focus on the uses to which that management information is put, both on a data-as-evidence basis, and also as a data analysis-informing-policy basis. Use and abuse of statistics is therefore likely to come into focus as the next stage of management information system development begins – whereby questions must be asked of what is being measured and why. Again, built on experience elsewhere, within Scotland that process has already been started through an external audit review of Historic Scotland which undertook a standard examination of internal performance management processes (Audit Scotland 2004). This suggested changes to key performance indicators (KPIs) to introduce both hard and ‘soft’ targets, where *outcome* rather than *output* is measured, reflecting the intentions behind new public management thinking.

Evidence which demonstrates the value of heritage to society may in the short term be overt manoeuvring for political and public support, but it usefully lays the foundations for a strategic approach to filter throughout the sector. This in turn may provide for a firmer basis for the recognition of heritage as a fundamental part of cultural management and the cultural policy process, creating capacity to proactively manage the resource with care, be able to make balanced decisions on objective rather than subjective or emotive bases, and democratise an inclusive rather than exclusive historic environment.

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