

Case Study – Historic Environment Scotland

1. The Organisation

Historic Environment Scotland (HES) is the new lead public body established to investigate, care for and promote Scotland's historic environment. It took up its full statutory role on 1st October 2015. HES has taken on the responsibilities of Historic Scotland and the Royal Commission on the Ancient and Historical Monuments (RCAHMS), which has been managing and recording the historic environment for more than a century. Its key responsibilities include:

- **Strategy** – leading and enabling Scotland's first historic environment strategy "Our Place in Time", which sets out how our historic environment will be managed. It ensures our historic environment is cared for, valued and enhanced, both now and for future generations.
- **Properties** – responsibility for more than 300 properties of national importance. Buildings and monuments in its care include Edinburgh Castle, Neolithic Orkney, Fort George and numerous smaller sites, drawing more than 3 million visitors per year.
- **Collections** – responsibility for internationally significant collections including over five million drawings, photographs, negatives and manuscripts, along with 20 million aerial images of locations across the world.
- **Investment** – HES invests about £14 million a year to national and local organisations, supporting building repairs, ancient monuments, archaeological work, the Conservation Area Regeneration Scheme and the voluntary sector.
- **Conservation** - its conservation experts provide guidance, training and technical research into Scotland's built environment.
- **Learning** - through its learning and outreach programme, HES promotes community and individual learning engagement with Scotland's heritage.
- **Environment** – contributing to the Scottish Government's strategy to tackle climate change and reduce Scotland's carbon footprint.

HES Corporate Plan 2016-19 is published on the website

<https://www.historicenvironment.scot/>

Historic Environment Scotland by numbers

- c. 335 properties and sites in care
- c. 3.8 million visitors to our staffed sites in 2015-16
- 5 million + drawings photographs, negatives and manuscripts relating to Scotland's historic environment
- tens of millions of aerial photographs of historic events and locations worldwide
- c. 160,000 members
- c. £42 million commercial income per year
- c. 1,280 staff across Scotland

2. Types of Volunteering

Background to volunteering in HES. As a body funded by the Scottish Government, there has been a traditional focus on the use of paid staff to support its work across Scotland, including the 335 historic sites in its care. As a consequence the engagement of volunteers has been more limited compared to major charities such as the NTS where volunteering is a core element of its service offer. However, it still engaged 319 volunteers in 2015, who contributed 1,073 days, figures which exclude the volunteering contribution under Scotland's Urban Past (the subject of a separate case study).

Categories of volunteering. There are 7 volunteering categories at present in HES – see Table 1 below. Some were developed a number of years' ago and are mature programmes; others are new and are in the process of development/rollout, such as the Commercial and Tourism Volunteer Development Pilot and the Engine Shed volunteer programme.

Table 1 – Summary of HES Volunteering		
HES volunteering categories	Short description	No. of volunteers (2015)
1. Ranger Service volunteers	<ul style="list-style-type: none"> • Conservation Groups at 2 parks – Holyrood Park and Linlithgow Palace & Peel • Conservation volunteers – surveys and monitoring of plant and animal habitats at the 2 parks • Volunteer Rangers – both Parks and Orkney World Heritage Site 	196 15 6
2. Linlithgow Palace Summer Guides	<ul style="list-style-type: none"> • Recruitment of volunteer guides from Linlithgow High School, who engage over the summer holidays 	38
3. Collections, Data and Recording' volunteers	<ul style="list-style-type: none"> • Volunteer roles include the care of and cataloguing of collections. Also, the re-housing of collections to ensure that they are preserved for the future. 	44
4. Governance	<ul style="list-style-type: none"> • Board members of HES 	10
5. Commercial & Tourism Volunteering Development Pilot	<ul style="list-style-type: none"> • A pilot programme running from 2014 – 16 	10 with further recruitment on-going as the pilot progresses
	Total	319
6. Engine Shed	<ul style="list-style-type: none"> • A volunteering programme is currently being developed for the new national conservation training centre 	TBC
7. Scotland's Urban Past	<ul style="list-style-type: none"> • Community-led projects engaging volunteers in the recording, exploring and celebrating Scotland's towns and cities. 	27

Instead of trying to profile all of the volunteering work across HES it was decided that the area of greatest interest for a case study would be a review of the 'Commercial & Tourism Volunteer Development Pilot'. The remainder of the case study examines the challenges facing a national body in rolling out a pilot volunteering programme, identifying what was successful and what lessons can be learned as the programme progressed.

3. Commercial & Tourism Volunteer Development Pilot

Rationale for Volunteering Pilot – the primary objective of the pilot was to test the feasibility of the introduction and scaling up of volunteering across a selection of HES's portfolio of properties with an ethos of quality not quantity to build a firm foundation for growth. However, the underpinning rationale for why the pilot was developed in the first place was due to the **perceived benefits** which volunteering can bring to all concerned:

- *Benefits to HES* – volunteers can provide important 'added value' benefits to the HES visitor experience through their knowledge and passion for the site/property; the fact that they are part of the local community and the interest and experience they bring – assets which complement the paid staff managing the sites.
- *Benefits to the volunteers* – it is widely recognised that the process of regular volunteering can confer important health and wellbeing benefits through community engagement, team working and personal learning and development.
- *Benefits to the visitors* – volunteers can add significantly to the visitor experience through their knowledge, commitment and shared enjoyment. In particular, they can provide the 'human link to the past' through the transfer of historical facts and stories and anecdotes they have learned from living in the community within which the historic site is located. This research ensures that these stories are captured and retained for the benefit of future generations.

Rollout of Volunteering Pilot – it was agreed that the pilot should be focused on the Commercial and Tourism Directorate of HES. The National Tourism and Community Manager, who is part of the 'Visitor Operations and Community Engagement Team', was tasked with leading the pilot. She is supported by her three Regional Tourism and Community Managers, who in turn support Volunteer Coordinators throughout the Estate

The introduction of the pilot had to be handled sensitively to ensure the effective integration of the volunteer roles with existing paid staff did not create any misunderstanding of intention towards introduction in relation to job replacement. A significant emphasis was therefore placed on staff communication and engagement as well as formal consultation with the unions to outline the three phase approach.

The pilot programme was structured into three phases:

Phase 1 – Duff House – this property was selected to be the first element of the pilot programme so that HES could build on an existing partnership relationship with a voluntary group. The objective was to engage volunteers to 'add value' to the visitor experience through the provision of guided tours. Key points:

- The goal was to ensure no overlap with the roles of paid staff – volunteers should be complementary to paid staff (not supplementary)

- Volunteers were recruited from within the Friends of Duff House for the pilot programme. Volunteers were fully involved in the shaping of the tours from start to finish to provide new stories and background information based on their local knowledge and community engagement.
- These 'Duff House Stories' tours provide information not in the official guide book and represent an additional 'added value offer'. Note: this is an important contribution to the 'associations which we can see, feel and understand' which is now included within the wider definition of the historic environment in OPiT.
- A member of the Friends Group now also volunteers to play the piano at Duff House.

The pilot of Duff House was operational running guided tours during the summer and winter of 2015/16, with the support of 3 volunteers. This tour guiding programme has now been extended into 2016 with further recruitment for additional volunteers taking place. The lessons learned at Duff House which are being taken forward include:

- The volunteers enjoyed being able to research and feed into the tour design and delivery method and this should be integral to the design of any new tours.
- The volunteers were keen to deliver more tours than HES scheduled in the pilot phase, so an increased pool of volunteers is required to allow for this.
- Engagement of local volunteers led to the development of the volunteer pianist role, showing the value of allowing for creativity in development of opportunities to match local interest with the attributes of a site.

Phase 2 – Event Volunteers – this programme was run during the summer of 2015 and involved 7 volunteers across 2 events. The two events were:

- The Spectacular Jousting at Linlithgow Palace over two weekend days.
- Craigmillar Castle Craft Skills Festival over one weekend day.
 - The Celebration of the Centuries at Fort George was included as an event but recruitment was unsuccessful.



Photo © Historic Environment Scotland

Volunteers engaged with visitors as they arrived, meeting and greeting them, providing information about the event, directing visitors, answering queries and, in the case of the Craigmillar event, staffing the information point. At the Craigmillar event they also helped to deliver conservation activities which simulated stone carving, lime washing, harling and the construction of arches. They encouraged visitors to handle replica items and they stewarded people within the Great Hall, where the science show was performed. At the Jousting event they handed out flags and helped to manage the flow of visitors within the arena area.

The lessons learned from this event volunteering include:

- HES requires that all volunteers hold a Basic Disclosure as a minimum safeguarding measure and this was viewed as prohibitive to engagement by some volunteers given the short timescale of event volunteer roles.
- Recruitment for event volunteers can be competitive if there is more than one event recruiting over the same period and it is thought this was part of the issue at Fort George.
- As this was a pilot, potential recruitment channels were not all fully utilised but will be to achieve growth.
- Schedule for volunteer tasks should focus on activities which enable the volunteers to interact with visitors whilst also being task orientated (such as handing out wrist bands, itineraries or flags).
- More breaks to be scheduled into the day to enable volunteers to enjoy more of the event.
 - Consideration to be given to 'buddying up' volunteers with specific skills with those with less experience.

Phase 3 – Site Specific Roles – building on the success of phases one and two the pilot has now been rolled out across 12 sites with c. 3 volunteers to be recruited per site with the roles to be introduced detailed in Table 2 below.

Roles were selected for activities that did not fall within core delivery by staff, could provide added value to the visitor experience, and would allow volunteers to engage with visitors and respond to insights and feedback from visitors (e.g. requests for guided tours/enjoyment of activities provided at events).

All site teams involved put themselves forward to be part of this phase and selection was carried out in consultation with the wider Visitor Operations & Community Engagement management team. During the final selection consideration was given to geographical spread, type of site, opening pattern and number of visitors to ensure that the evaluation would cover a good balance of site attributes throughout the Estate.

The approach taken in phase one will be used to work with the volunteers to shape the tours they will be delivering. Visitor activities will include the use of handling collection boxes with replica items relevant to the site's history as well as historically relevant arts and craft activities.

Table 2 – Volunteering Roles in Pilot Volunteering Programme				
Sites	Tour guide	Visitor activity	Gardener	Other role
Duff House	*			Piano player
Huntly Castle	*			
Hackness Battery & Martello Tower	*			
Fort George	*			
Blackness Castle			*	
Dumbarton Castle	*			
Dryburgh Abbey	*	*		
Jedburgh Abbey		*		
Melrose Abbey	*	*		
Threave Castle	*			
Craignethan Castle	*			
Totals (for 11 sites)	9	3	1	1



Photo © Historic Environment Scotland

Strengths of the Volunteering Pilot – the key factors for success were:

- Planned approach – project leader with specific experience and qualification in the topic.
- Careful communication with staff.
- Everyone understood the vision and values of the project.
- This included consultation with RCAHMS and HS Unions. The pilot was based on the principle of the ‘added value’ of volunteering – not role replacement. There was full support from the Unions.
- Phased approach – steady rollout based on quality not quantity to build a firm foundation.
- Ongoing evaluation built into project delivery.

- Careful management – this was underpinned by staff who ‘volunteered’ to become ‘Volunteer Coordinators’ – individuals who valued this role as part of their professional development.
- Successful volunteer engagement by HES staff at pilot sites.
- The enjoyment of volunteers from their varied roles and contributions. They value access to HES sites and the contribution they can make.
- Wider support from HES teams in both the Commercial and Tourism Team and the other Directorates.
- Support from Volunteer Scotland – which including training support and strategic inputs.

Challenges of the Volunteering Pilot – This was ‘new territory’ for HES with significant unknowns but there have been no major issues to date. Careful consideration was required for resourcing of the pilot in balance with the other remit areas of the lead team but this has been managed effectively with strong internal communication.

Policy context – the volunteering pilot is supportive of Government policy in three main areas:

1. Its contribution to Our Place in Time – in particular the ‘Share’ theme
2. Its contribution to the Government’s health and wellbeing agenda. The active engagement of volunteers will hopefully confer benefits to the volunteers themselves (to be researched as part of the pilot’s evaluation study)
3. Its contribution to community engagement and cohesion. This volunteering initiative is bringing volunteers, the historic building/site and the community together with spin-off benefits locally.

The Future of Volunteering at HES – the National Tourism and Community Manager will be conducting a formal evaluation of the pilot programme to learn from its successes and to identify where the volunteering contribution could be enhanced. Given the success of the pilot to date, there are significant potential opportunities for building on the existing HES volunteer programme steams outlined in Table 1 and extending development across HES. However, such a commitment will be dependent on strong evidence of impact and the resources to deliver.

Technical note on the rationale for inclusion of Conservation Survey Volunteers in HES volunteer numbers

The habitats, species and areas being surveyed by these groups/individuals would not exist were it not for their previous use by humans over time adapting the landscape. Thus the surveys undertaken by these individuals on this landscape/SMC are directly linked to the historic environment as both the culture and natural heritage of the sites are inextricably intertwined.

Survey methodologies and introductory discussions with these volunteers centre around the reason for the existence of these sites (as noted above), the habitat and therefore the species they are here to survey/monitor/protect.

The results generated from these surveys are shared locally, nationally and internationally with interested partners as well as being shared on site with visitors and users through onsite interpretation boards, guided walks/events programme, learning programme and community engagement activities.

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