







# CP20 'Action - Report - Monitor' (ARM) Update

***IHBC National Office update on delivering the Corporate Plan 2015-20, 'CP20'***

**F&R+ 27 October 2016: End Year 1**

## KEYS

### Code for reporting progress

Action Scheduled (by year)	
Achieved and/or surpassed	
Progress made in line with expectations	
Key actions achieved for period but still ongoing	
Alert	
Reporting text changed from previous ARM update	

### Action priorities

### Priority

T	Top
M	Medium
L	Low

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## **CP20 Summary report for the period: Year 1 update, 27 October**

### **Helping People**

1. Gus Astley Student Awards allocated for 2015 with Judge agreed for 2016, linked to DB Wiki, David trench CBE
2. First year of Marsh Awards concluded and process established internally
3. IHBC Conservation Wiki established and operating alongside historic publications
4. Caring for your Home resource launched as successor to 'Stitch in time'
5. 'Champing', the IHBC-Churches Conservation Trust heritage leisure programme initiative launched
6. Branch and Events Support Officer role agreed and filled, with communications and networking priorities added
7. Arrangements for £2500 Conservation Area celebrations by Civic Trusts in place, awaiting civic trust approval
8. Social media infrastructure and capacity extended with Support Officer appointment, now passing 14,000
9. New outreach and promotional initiatives in place, including 6-months NewsBlogs tasters, and free Jobs *etc* access
10. Linking to suite of celebrations of 50 years of Conservation Areas, including Context, and numerous consultations



### **Helping Conservation**

1. 2016 School delivered, with 2017 (Manchester) in place and 2018 (NI) under discussion by Committee and Branch
2. All publications concluded, with Research and Guidance Notes contributing to securing the Toolbox
3. MOU model established with CIfA, and more planned
4. Consultations and advocacy active, including responding to Historic England 'Trailblazer' apprenticeship scheme and curtilage issues,
5. Council+ established as UK-wide resource and interface with sector
6. Evolving 'Communications Strategy' initiated
7. DAC Secretary and staff training phase 1 concluded with IHBC Member Application support events established locally
8. Jobs *etc* data roundup for 2015, with c.£6m salaries: <http://ihbconline.co.uk/newsarchive/?p=12537>
9. IHBC Enterprises model project bidding process established internally, to include partnering with ALGAO
10. Quality Assurance for conservation services in planning authorities initiated and model established for discussion
11. Branch and Course Connections Days offered, including website recording the latter

### **Helping Conservation Specialists**

1. AGM concluded with annual accounts *etc.* adopted and with all Committees chaired by elected trustees
2. Trustees agree new reporting on corporate plan. CP20: 'ARM' (Action, Reporting and Monitoring)
3. Members 'Practice Standard' jointly drafted with HTF currently under final approval
4. Structures for IHBC+ programme established, including New Vice President role as headline model for adding capacity
5. HESPR Bulletins developed and now established as core weekly service.

REPORT UPDATES: Y1 S2		Action (From Corporate Plan 2015-20) o Year and task description if applicable	Priority: Top, Middle, Low	Lead (Committee & Office)	Target: Priority/Year (1-5)	Cost	Targets achieved by Y5			
Object A: To Help People										
A.1.1	Online in Beta at <a href="http://ihbconline.co.uk/caring/">http://ihbconline.co.uk/caring/</a>	• Deliver the 'Caring for your home' online resource as accessible tool for public use	I	Dir/Po	o Online T/1; Integrated T/5	Core	X			
A.1.2	Tied to new report from Les Pickford promoting Communications Strategy that would support more effective integration of news and consultations (reported to Trustee meeting)	• Articulate global conservation relevance and interests	I	Dir; C&O	o Establish infrastructure for 'Global (Overseas) Membership' T/5	Core				
A.2.1	Delayed following need to change lead consultant	• Biennial member surveys T/1-5 (and 6)	I	Dir; C&O	• Biennial member surveys T/1-5 (and 6)	Core				
A.2.2	Research and Guidance Notes progressing with reach extended as selection features on Conservation Wiki	• Extend research infrastructure (including Research notes) to encourage volunteers to shape, inform and as appropriate produce research and guidance documents	I	Dir; ETS	o Research & Guidance Notes @ c.10/pa; T/1-5	Core				

A.2.3	Draft online arrangements under development with draft at <a href="http://ihbc.org.uk/consultation/sdb_new/examples/basic_init/IHBCreps_orgs.html">http://ihbc.org.uk/consultation/sdb_new/examples/basic_init/IHBCreps_orgs.html</a> . Further arrangements under exploration of dedicated (policy) guidance for reps.	<ul style="list-style-type: none"> <li>Establish infrastructure for managing member-linked networks (organisational representation etc.)</li> </ul>	<b>I</b>	Dir; F&R+ & Chairs etc	o Revised procedure for and mapping of organisational representation operational T/2	Core						
A.2.4	N/A	<ul style="list-style-type: none"> <li>Explore potential for CapacityBuild as an economically viable voluntary sector resource to enhance public access to IHBC's networks</li> </ul>	<b>M</b>	Dir/ETS	o Partner to deliver CapacityBuild equivalent M/5	Core						
A.2.5	N/A	<ul style="list-style-type: none"> <li>Re-visit potential of 'Honorary Associates'</li> </ul>	<b>M</b>	DO/C&O	o Test and implement former Honorary Associate (title revised to reflect new Associate category) M/5	Core						
A.3.1	TeamStarter variant with introductory level for DAC in England: 5 events, with c.20+ people at each. Second stage from December 7th, with at least 2 dedicated 'Application support' days planned.	<ul style="list-style-type: none"> <li>Maintain and extend 'TeamStarter' programme (incorporating opportunities for Associates)</li> </ul>	<b>I</b>	Dir; ETS	o Usage (10 TeamStarter programmes and 100 unique SelfStarter (WebStarter) users) T/5	Core						

A.3.2	<ul style="list-style-type: none"> <li>Also linked to DAC initiative, which included introductory-level presentations to non-specialists</li> <li>Programme tied to Civic Voice-led HLF bid for GII Heritage At Risk project on hold as bid turned down by HLF</li> </ul>	<ul style="list-style-type: none"> <li>Establish [learning] framework for 'non-specialist' practitioners and lay interest access to IHBC services</li> </ul>	<b>I</b>	Dir; ETS	o Learning 'Framework' in place T/5	Core					
A.3.3	Continued contact with Civic Trust in Wales ties to support for IHBC's CA celebrations fund	<ul style="list-style-type: none"> <li>Promote Wales Historic Environment Network or equivalent</li> </ul>	<b>M</b>	DO/Pol	o WHEN' (Wales Historic Environment Network) or equivalent established M/5	Core					
A.3.4	Initial queries in place for extending links within and from NI and Republic (possibly supported via ICOMOS) and including 2018 Annual School,	<ul style="list-style-type: none"> <li>Explore link body equivalences to BEFS etc. for Northern Ireland and beyond</li> </ul>	<b>M</b>	DO/Pol	o NIHEN' (Northern Ireland Historic Environment Network) determined M/5	Core					
A.3.5	<ul style="list-style-type: none"> <li>James Caird to join DK and DMcD in lead at PLACE, assisted by Support Officer, and meeting planned on next financial year (<a href="http://ihbconline.co.uk/newsarchive/?p=12145">http://ihbconline.co.uk/newsarchive/?p=12145</a>)</li> </ul>	<ul style="list-style-type: none"> <li>Enhance links to Farrell-linked 'PLACE' initiative</li> </ul>	<b>M</b>	DO/Pol	o 5 Regional 'PLACE Hubs' linked to Branches M/5	Core					

Object B: To Help Conservation									
B.1.1	<ul style="list-style-type: none"> <li>MOU underpinning membership with 1 year 'free trial': <a href="http://ihbconline.co.uk/newsarchive/?p=13505">http://ihbconline.co.uk/newsarchive/?p=13505</a></li> <li>Under discussion with COTAC and Heritage Trust Network (former UKAPT: <a href="http://ihbconline.co.uk/newsarchive/?p=13538">http://ihbconline.co.uk/newsarchive/?p=13538</a>)</li> <li>Template passed to ALGAO</li> </ul>	Additional - • Explore opportunities for 'Memoranda of Understanding' to enhance partnerships favouring built and historic environment conservation practice	I	Dir; F&R+ (Chairs etc)	o 5 by Y5 o Lead Committee: F&R+ (Chairs etc)	Core			
B.1.2	N/A	• Explore chartering in built and historic environment conservation as a benefit to the IHBC and our members	I	Dir; F&R+ (Chairs etc)	o Report T/3, Implement M/5	Core			
B.2.1	BES Officer support in place to help develop the Branch infrastructure support this, but maternity leave for LETS officer may delay in part.	• Agree a 'training priorities framework' across committee, Branch and other infrastructure	I	LETS/ETS	o Agreed 'training priorities framework' T/3; Implemented T/5	Est: £2000			
B.2.2	BES Officer in place to support and help develop the Branch infrastructure, while maternity leave for LETS officer may delay in part.	• Develop sector strategy to identify training needs and priorities	I	LETS/ETS	o Strategy M/2 or T/4	Core			
B.2.3	Toolbox operational, including Research and Guidance Notes content and process for progressing from draft to content and online posting:. Further population in progress, including standards etc.	• Promote practice standards etc. by creating an accessible online resource for practitioners	I	DO/Pol	o Toolbox operational T/1; fully operational T/3	Core			

B.2.4	N/A	<ul style="list-style-type: none"> <li>Explore targeted support for Conservation Officer Groups (COGs)</li> </ul>	<b>I</b>	LETS/ETS	o Explore potential strategy M/3	Core						
B.3.1	<ul style="list-style-type: none"> <li>Consolidated research base for expert, evidence-based advocacy in place (Toolbox)</li> <li>Additional capacity proposed from Les Pickford tied to Communications Strategy supporting integration of news and consultations (update to Trustee meeting)</li> </ul>	<ul style="list-style-type: none"> <li>Establish credible and verifiable research credentials for IHBC – including for relevant advisory services – to underpin advocacy and representation, such as expert IHBC papers and related services and projects that offer advice on conservation service provision and standards</li> </ul>	<b>I</b>	Dir/ETS	o Integrated research and advocacy programme T/5							
B.3.2	N/A	<ul style="list-style-type: none"> <li>Explore funding for IHBC education post or related</li> </ul>	<b>M</b>	LETS/ETS	o Dedicated post (or equivalent) in place M/5							
B.3.3	Tied to new report from Les Pickford promoting Communications Strategy that would support more effective integration of news and consultations (reported to Trustee meeting)	<ul style="list-style-type: none"> <li>Develop a strategy to deliver effective advocacy based on research outcomes, testing its implementation with a programme focussed on generating heritage-linked tax relief</li> </ul>	<b>I</b>	Dir/ETS	o Research and advocacy pilot programme (perhaps for Tax) completed T/3	Core						

Object C: To Help Conservation Specialists										
C.1.1	Associate membership processes operating internally in line with projections, and mapping to Home Countries Protocol standard (by COTAC for HE)	<ul style="list-style-type: none"> <li>Added: Embed Associate membership in processes T/5</li> </ul>	I	Dir/M&E	o Associate membership accreditation recognised					
C.2.1	Represented for Y1 by HESPR tender announcements in NewsBlogs	<ul style="list-style-type: none"> <li>Develop a sustainable new core benefit/service (such as NewsBlogs or tender advertisements (for HESPR))</li> </ul>	T	DO/C+	o 1 new core service T/5					
C.3.1	Office manual draft Appendices under progress, with timeline for actions	<ul style="list-style-type: none"> <li>Consolidate office management with new office manual</li> </ul>	I	Dir; F&R+ (Chairs etc)	o Manual operational T/1	Core				
C.3.2	BES Officer with Director to review processes with a view first of linking donations to expenses claims	<ul style="list-style-type: none"> <li>Establish charity infrastructure including fundraising committee, and secure funding</li> </ul>	I	Dir; F&R+ (Chairs etc)	o Established T/2; Functioning T/5	Core				
C.3.3	<ul style="list-style-type: none"> <li>C+ meetings for December 2015 and May 2016 successfully concluded in London and Derby respectively</li> <li>C+ meeting for December under planning</li> </ul>	<ul style="list-style-type: none"> <li>Implement lessons from IHBC+</li> </ul>	I	Dir; F&R+ (Chairs etc)	o Updated constitution T/5	Core				
C.3.4	Business plan draft agreed	<ul style="list-style-type: none"> <li>Develop IHBC Enterprises strategic business planning to serve IHBC</li> </ul>	I	Dir; F&R+ (Chairs etc)	o Business Plan agreed T/2, Operational T/3					
C.3.5	N/A	<ul style="list-style-type: none"> <li>Review 'Corporate Plan 2015-20', CP20', using sector surveys to measure success</li> </ul>	I	Dir; F&R+ (Chairs etc)	o CP20 reviewed T/3; 'CP30' T/4 (Draft); T/5 (Adopted)	Core				