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The home of the conservation professional

THE INSTITUTE OF HISTORIC BUILDING CONSERVATION

'The home of the conservation specialist'

Corporate Plan 2015-20 ('CP20')

***CP20 Action Plan:
CP20 monitoring, reporting & implementation***

MEMBERSHIP CONSULTATION DRAFT

(Highlighted text to be confirmed)

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1. CP20: Background

This is the draft guidance for monitoring and implementing the IHBC's Corporate Plan 2015-20 ('CP20'), including arrangements for reporting to trustees, members and stakeholders as appropriate.

CP20 was adopted at the 2015 AGM of the IHBC, in Norwich (<http://ihbconline.co.uk/newsarchive/?p=10464>). The draft guidance here has been developed from procedures used for managing its predecessor, the IHBC Corporate Plan 2010-15 (CP10; see [www. http://ihbconline.co.uk/newsarchive/?p=11445](http://ihbconline.co.uk/newsarchive/?p=11445)).

This document proposes a range of key indicators or measures (and, as appropriate, targets) to facilitate monitoring progress in implementing CP20. These align with the plan's Objects A-C, as described below. It also includes an overarching implementation strategy to help guide more detailed decision-making by trustees and members. These should be read in conjunction with the draft Action Plan table at the end of this document.

To give context to the proposals, select briefings and data on previous corporate planning are also included.

2. Proposals for monitoring and reporting on CP20 Objects A-C

OBJECT A: HELPING PEOPLE

Context: Accessible digital services are central to the IHBC's support for 'helping people'. Since 2010 the institute has delivered a fifteen-fold increase in website usage to c.450,000 monthly visits, up from c.30,000 in July 2010, while our digital networks have expanded to c.10,000, a fifteen-fold uplift on the targets agreed then.

Other publicly accessible services and support from the IHBC include the institute's NewsBlogs (offered also in the member-only email alert services), which have doubled both in number and frequency of updates; our recent 'LETS' officer support, which underpins external engagement as well as internal learning, and the dedicated consultants for our NewsBlogs and new research programme – represented best by our open-access Research and Guidance Notes.

Altogether these developments have extended substantially our core capacity for outreach into the widest public arena. Now, with resources to invest in enhanced networks, closer monitoring of service standards, and more extensive support for all members, CP20 proposes a much more substantial impact in our delivery of public – and publicly accessible – benefits.

Object A: Proposed headline targets

- Total number in digital networks (Twitter, LinkedIn etc.) @ 100% increase:
 - 2014-15: c.10,000
 - 2020: c.20,000
- 20-20 Survey: (Sector awareness survey: details under development) @ 10% improvement
- Total Volunteer Hours (Estimates under development) @ 20% increase

OBJECT B: HELPING CONSERVATION

Context: Specialist support for conservation standards in all mainstream activities that impact on built and historic environment conservation – from archaeology and history to mainstream construction and design – lies at the heart of the institute's strategy to improve conservation outcomes. One of the most effective ways to enhance that support is to make sure that practitioners that can benefit from our work can also participate in our services.

In September 2010 we had 2086 total paying members – both Affiliates and Full members, as opposed to c.2200 in 2015, at the start of CP20. Evidently numbers have only risen slowly over the five year period covered by CP10. This had been anticipated as we consolidated infrastructure following a period of exceptional growth in membership, from c.2005-when we offered targeted support for member expansion and grew our membership base from 1500 in c.2005 to the c.2000 in 2010, or approximately 33% growth over those 5 years.

Following that consolidation we are now keen to re-focus on extending our membership reach, and for CP20 suggest again a 33% increase for the period. That is ambitious, but it is also considered realistic, subject to an appropriate working environment. This is because the new infrastructure developed by the IHBC since 2010 should provide a suitable platform for progress, including, in addition to services mentioned above:

- New support framework for practitioners, including the evolving 'Toolbox' with Research and Guidance Notes
- Conservation National Occupational Standards (NOS) and related vocational qualifications
- Accessible and cost effective training programmes (TeamStarter and SelfStarter)
- A new membership category to help members secure Full membership, our Associates.

At the same time, the institute remains the most competitively priced support body for specialists with conservation interests, as our new capacity and benefits have been underpinned by enhanced income from projects and services. Consequently membership fee categories have risen only in line with inflation. We have also introduced an integrated fee and bursary support

regime that ensures that the IHBC continues to offer best value across for an ever widening spectrum of users.

Given these considerations, both a 33% increase in members and a more modest 10% uplift in membership satisfaction – given the high base line - appears feasible. Similarly, as we extend our reach and structures, the 'Memorandum of Understanding' (MoU) has been agreed as a useful tool for the future, and we see 5 MoUs overall as a reasonable estimate given current interest.

Object B: Proposed headline targets

- Total subscribing members: Affiliate, Associate, Full and Retired @ 33% increase from c.2200 to c.3000 ()
- Membership satisfaction: 10% improvement
- 5 MoUs with relevant partner bodies

OBJECT C: HELPING CONSERVATION SPECIALISTS

Context: Numbers of current Full IHBC members are being revised down as we rationalise our membership categories and reclassify non-practicing retired members from 'Full' to 'Retired'. The process is still underway and will not be completed until early 2016 when detailed figures will be incorporated in this Action Plan.

Given the enhanced attractions of IHBC membership we can be confident that numbers will continue to rise from the revised base line. In addition to the wide-ranging benefits noted above, the institute has recently enhanced its infrastructure for encouraging membership applications by specialist practitioners, including:

- Extending fee support targeted to practicing members, including School bursaries
- Exploratory governance programmes to encourage wider engagement
- Programmes of Branch-led events, supported by our LETS Officer, advising on the membership application process
- A sustainable and credible disciplinary process
- New, updated professional indemnity scheme targeted at member needs
- Enhanced support and profile for HESPR members, including regular bulletins reporting on commercial opportunities, accessible only to Full members.

We also anticipate a more flexible working environment that will enhance the attraction of IHBC membership, not least with the relocation of large areas of built and historic environment operations previously tied to central government.

These internal developments and external trends suggest a conservative

estimate for any increase in members working in line with the IHBC's practice standards. Consequently this Plan proposes a more modest 20% increase in Associate and Full members over the period.

As our HESPR programme is starting from a lower base, and in light of its wider sector potential, we consider that a much more ambitious doubling of members there seems appropriate, from c.25 to 50 members.

In addition we are proposing as key measures the revision of the constitution, a full business plan for our trading arm, and a fully operational Office Manual.

Object C: Proposed headline targets

- Total members: Associate and Full @ 20% increase, estimated provisionally at 200
- Total HESPR members: 100% increase to 50
- Constitution updated in line with 'IHBC+' lessons
- IHBC Enterprises supported by full Business Plan

3. Resources and capacity

Membership (under CP20, Object B) is the only headline target proposed that will impact substantially on resources.

Outline figures are estimated as follows:

- Subscription Income
 - 33% increase (before inflation estimated @10% over 5 years)
- Other Income
 - 15% increase (before inflation estimated @10% over 5 years)
- Expenditure
 - 20% increase (before inflation estimated @10% over 5 years)

The more modest increase in estimated expenditure (20%) compared to membership (33%) is justified by the fact that services for new members generate more limited additional costs as unit costs are reduced.

As with CP10, effective and regular reporting and monitoring will allow for detailed adjustments in budgets and projections on an annual basis and more regularly as needed. This strategy allows for a flexible response to our business and operating environments, which are expected to continue facing substantial, rapid and ultimately unforeseeable change.

IHBC Charity: Projections 2019-20 (2014-15 base reconciled)

@ 10% inflation total Y1-Y5	Income 2014-15 Projected & rebased	2019-20	Increase from 2015
Subscriptions @33% increase+ 10% inflation	231057	337930	106873
Other @15% increase + 10% inflation	136675	171138	34463
Total Income	367732	509068	141336
Total Expenditure @20% increase	367150	477206	110056
Excess	582	31863	31281

4. Implementing CP20: Headline strategies

The following are key areas for development to assist in the implementation of CP20. Inevitably areas will overlap, as reflected in the overlapping reporting on Actions. Critically, none will be developed that do not align with the IHBC's current constitution, a core principle in the 'exploratory evolution' underpinning the 'IHBC+' initiative.

4.a Refining governance

- To maximise benefits from volunteers, we will evolve corporate structures to serve the needs, capacities and interests of volunteers first:
 - Establish an ethos of 'contributory participation'
 - Here active volunteering in IHBC (or supporting IHBC causes) generates skills that improve career prospects
 - Our Council+ offers a new route to national roles
 - Improved guidance and support will raise volunteer awareness of, and facilitate access to, opportunities for targeted skills and CPD development
 - Develop structured succession planning geared to support executive, fully trained and skilled trustees in roles that represent the culmination of their IHBC-supported learning
 - Board of trustees: Create a culture of trustees skilled as volunteers in the IHBC's corporate activities
 - Offer learning, education and training in operations that align with the IHBC's corporate needs and objectives
 - Promote appointments in line with demonstratable skills and interest
 - Encourage this approach by promoting more

vice-chair roles across all levels

- Structured, time-limited terms of office
- For 'Council+', though members are not necessarily trustees, ensuring that practice standards and learning opportunities are appropriate and comparable:
 - Suitable training for specific national roles
 - Recognisable 'personal' roles, as opposed to representative positions, in line with trustees duties
 - Encouragement for exemplary ethical practice, including appropriate standards of discretion and behaviour
 - Opportunities and capacity to take responsibility for committee and other business plan delivery
 - Capacity to nominate or elect specific trustees
- Committees & Branches will also evolve to:
 - Deliver the 'peripatetic' outreach role previously adopted by Council, but operating more flexibly
 - Special-interest (sub-)committees representing specific areas of interest for members can be encouraged and potentially access infrastructure funds
- Elections could be explored in terms of how they might key points in structure of governance, used to select lead officers (Committee leads; C+ members; Board) with appointments based on:
 - Demonstrated skills aligned to descriptions of roles supported by training, guidance and office capacity
 - Encouraging balanced representation
 - Linked to personal capacity to deliver on relevant areas of the Corporate Plan

4.b Investing in volunteers

- Support volunteers with improved guidance, training, resources and, where possible, capacity to help maximise any personal benefits to volunteering roles – for example by helping CPD – alongside delivering the Action Plan below.
- Branches
 - Increase allocations @ £250 across the board from the current year, and potentially more as resources allow
 - Maintain/extend LETS Officer roles (direct or, with more support, indirect)

- Committees
 - Offer enhanced support from the National Office (subject to resources)
- Members
 - Offer wider opportunities, flexibility, transparency and infrastructure to encourage participation, involvement, skills development and CPD across all IHBC operations, activities and interests, supported by or entailing:
 - Improved guidance for committee members
 - As authors and sub-editors in online publications (guidance under preparation & including NewsBlog features)
 - Expansion of support for the 'Stepping stones' programme – including progressing awareness of the opportunities arising in Associate membership – to facilitate growth of multi-disciplinary skills, including:
 - Diversifying structured routes to skills development including
 - SelfStarter (formerly WebStarter) and TeamStarter; National Occupational Standards; building skills linked to conservation courses
 - The IHBC 'Toolbox'
 - Extend constituency for formal recognition of conservation skills
 - The promotion of dedicated interdisciplinary practice standards appropriate to informed conservation practice

4.c Sector outreach

- Develop MOUs (c.5) tied to recognition of IHBC conservation skills

4.d National Office

- Investing in Staff
 - Review support arrangements
 - Refine management policies
 - Refine structures
 - Director to focus on supporting Board of Trustees and IHBC

commercial and business development

- IHBC enterprises with dedicated allocation of time
- Immediate focus on generating business plan complementary to and building on IHBC charity strengths, networks and capacity (as has been achieved with the jobs adverts and HESPR)
- Projects Officer to take more strategic role
 - Appointment as 'Operations Director' to lead operational support, with additional capacity to come from staff and contracted support, responsible for regular business on Committees and Branches
 - Support will be brought in as needed on a projects/consultancy basis, so it remains flexible to reflect directly any variations in resources and capacity
 - Consultant roles, advertised in accordance with current protocols and processes, will recognise the value of HESPR quality assurance for all appointments and services)

5. Summary reporting strategy - Monitoring and measuring 'Actions'

Reports to trustees, members and stakeholders are to be simplified from those used for the IHBC's Corporate Plan 2010-15. Three classes of monitoring are proposed in the Action Plan overleaf:

- **Office monitor and updates:** To help streamline reporting an 'Office Manual' will be developed by 2016 and serve as an internal 'programme monitor' of ongoing activities, with trustees alerted on a case by case basis should threats be identified
- **Monitored Apart:** These are actions that are monitored in other parts of the reporting programme (cross-referenced parenthetically)
- **CP 20 New Actions:** These are actions specific to CP20, which will be the primary focus of reporting and trustee review, such as the development of research infrastructure, or new online resources (such as the 'Toolbox' and the 'Caring for your Home' site).

Details of most programmes identified here can be found through a search of the IHBC NewsBlogs.

CP20 ACTION PLAN: For details try searching IHBC's NewsBlog archive at <http://ihbconline.co.uk/newsachive/>

Object A: Helping people

Overarching measures (and, as appropriate, targets) for Year 5 (Y5):

- Total number in digital networks (LinkedIn etc.):
 - 2014-15: c.10,000
 - 2020: c.20,000 (100% increase)
- 20-20 Survey:
 - 2015: count tbc
 - 2020: 10% improvement
- Total Volunteer Hours tbc Estimates (20% increase)

Aims		Action		
		'New Actions' Key: Priority/Year = T,M,L (equating to Top, Medium or Low)/Year 1-5		
A.1	<p><u>Extend resource and network potential of web services:</u> Maintain and enhance the Web site to underpin access to IHBC resources and capacity</p> <p><u>2020 Key Aims</u></p> <ul style="list-style-type: none"> • Extend IHBC's 'local and global' reach and impacts • Increase impact by improving services and benefits 	<p><u>Core delivery strategy: Extend web and digital services and networks</u> Develop web-based resources, capacity and networks that combine local relevance with global application while remaining accessible and financially sustainable.</p> <p><u>Office monitor & updates</u></p> <ul style="list-style-type: none"> • Maintain and update web content and resources (for example the 'IHBC Jobs etc.' resource) • Maintain and update NewsBlogs and e-mail alert service • Refine public access to web-based resources including advice, policy, enquiries and related areas • Promote 'IHBC Jobs etc.' site as resource for recruitment, including trustees etc. • Refine access to digital resources and linked new benefits to enhance value and impact of IHBC <p><u>Monitored apart</u> (Primary source in parentheses)</p> <ul style="list-style-type: none"> • Extend and refine reach of and access to social and digital resources and tools (Object A) <p><u>CP20 New Actions</u></p> <ul style="list-style-type: none"> • Deliver the 'Caring for your home' online resource as accessible tool for public use <ul style="list-style-type: none"> ◦ <i>Online T/1; Integrated T/5</i> ◦ <i>Lead Committee: Policy</i> • Articulate global conservation relevance and interests <ul style="list-style-type: none"> ◦ <i>Establish infrastructure for 'Global (Overseas) Membership' T/5</i> ◦ <i>Lead Committee: C&O</i> <p><u>CP20 Measure</u></p> <ul style="list-style-type: none"> • Total number in digital networks (LinkedIn etc): 2020: c.20,000 (100% increase) 		
A.2	<u>Empower IHBC</u>	<u>Core delivery strategy: Integrate 'IHBC+' and 'LETS' Liaison Officer initiatives</u>		

CP20 ACTION PLAN: For details try searching IHBC's NewsBlog archive at <http://ihbconline.co.uk/newsarchive/>

	<p><u>members as volunteers:</u> Maintain and develop support for volunteers to maximise voluntary capacity</p> <p><u>2020 Key Aims</u></p> <ul style="list-style-type: none"> • Maintain and enhance member services • Integrate corporate and volunteer management and support so as to improve capacity and outcomes • Maintain focus on service standards using regular survey feedback 	<p>Implement and deliver on lessons of 'IHBC+' to extend volunteer access to IHBC operations and management, while also enhancing the 'LETS' role, guided by regular member and sector feedback.</p> <p><u>Office monitor & updates</u></p> <ul style="list-style-type: none"> • Embed 'LETS' Liaison Officer capacity-building across mainstream IHBC operations • Hold annual Branch Connection Days • Maintain on-line advocacy resources to help volunteers engage with political issues • Review and re-evaluate structures to maximise potential for membership involvement and contributions • Maintain support for development of web resources for Branches <p><u>Monitored apart</u> (Primary source in parentheses)</p> <ul style="list-style-type: none"> • Recast support infrastructure (promotion, policy and management) of voluntary activities (Object A) <p><u>CP20 New Actions</u></p> <ul style="list-style-type: none"> • Maintain and develop member and sector surveys to monitor progress <ul style="list-style-type: none"> ◦ Annual (<i>or biennial?</i>) member surveys T/1-5 ◦ Lead committee: C&O • Extend research infrastructure (including Research notes) to encourage volunteers to shape, inform and as appropriate produce research and guidance documents <ul style="list-style-type: none"> ◦ Research & Guidance Notes @ c.10/pa; T/1-5 ◦ Lead Committee: ETS • Establish infrastructure for managing member-linked networks (organisational representation etc.) <ul style="list-style-type: none"> ◦ Revised procedure for and mapping of organisational representation operational T/2 ◦ Lead committee: F&R+ • Explore potential for CapacityBuild as an economically viable voluntary sector resource to enhance public access to IHBC's networks <ul style="list-style-type: none"> ◦ Partner to deliver CapacityBuild equivalent M/5 ◦ Lead Committee: ETS • Re-visit potential of 'Honorary Associates' <ul style="list-style-type: none"> ◦ Test and implement former Honorary Associate (title revised to reflect new Associate category) M/5 <p>Lead committee: C&O</p> <p><u>CP20 Measure</u></p> <ul style="list-style-type: none"> • Total Volunteer Hours estimated increase 25% 		
A.3	Influence and	<u>Delivery strategy: Extend access to benefits and services</u>		

	<p>empower non-specialist and lay interests: Promote wider public (lay), and non-conservation specialist awareness of the benefits of conservation</p> <p>2020 Key Aims</p> <ul style="list-style-type: none"> • Integrate potential and benefits of lay and non-conservation specialist interests (political and civic; client, user and partner bodies) into operations and services • Extend and adapt training resources to facilitate non-conservation specialist and lay use • Apply lessons in lay skills support from 'Oxford Project' 	<p>Encourage recognition and embedding of conservation principles, standards and practice across mainstream non-conservation specialist practice and processes as well as in lay interests, including prospective client bodies (owners; stockholders etc.), with priorities for action in: Access; Inclusion; Diversity; Sustainability; Health and Biodiversity.</p> <p>Office monitor & updates</p> <ul style="list-style-type: none"> • Re-cast 'WebStarter' programme themes specifically for civic, citizen and other lay interests • Host and co-host parliamentary and related events highlighting sustainable values in conservation • Refine consultations panel operations in line with CP20 • Extend representation within and across the IHBC • Maintain and extend open 'social networking' in line with CP20 • Recast 'peripatetic' Council strategy for Committee implementation <p>Monitored apart (Primary source in parentheses)</p> <ul style="list-style-type: none"> • Recast infrastructure of partnership and influence, including tools for collaboration such as Memoranda of Understanding (MOUs) and representation on partner organisations and networks (MoUs: B.3) • Review implementation of 'Honorary Associates' initiative (A.1) • Formalise links with select 'Green' and related environment bodies (MoUs) • Progress 'Oxford project' on skilled volunteers (http://ihbconline.co.uk/newsarchive/?p=8852) • Contribute to the 'Mainstream' strategy in Scotland's Historic Environment Strategy (TeamStarter) • Articulate conservation priorities in NHPP/Heritage 2020 programme (England) (Overarching) • Implement 'Caring for your home' resource, building on relevant links and services (A.1) <p>CP20 New Actions</p> <ul style="list-style-type: none"> • Maintain and extend 'TeamStarter' programme (incorporating opportunities for Associates) <ul style="list-style-type: none"> ◦ Usage (10 TeamStarter programmes and 100 unique SelfStarter (WebStarter) users) T/5 ◦ Lead Committee: ETS ◦ • Establish [learning] framework for 'non-specialist' practitioners and lay interest access to IHBC services <ul style="list-style-type: none"> ◦ Learning 'Framework' in place T/5 ◦ Lead Committee: ETS • Promote Wales Historic Environment Network or equivalent <ul style="list-style-type: none"> ◦ WHEN' (Wales Historic Environment Network) or equivalent established M/5 ◦ Lead Committee: Policy • Explore link body equivalences to BEFS etc. for Northern Ireland and beyond <ul style="list-style-type: none"> ◦ NIHEN' (Northern Ireland Historic Environment Network) determined M/5 	
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CP20 ACTION PLAN: For details try searching IHBC's NewsBlog archive at <http://ihbconline.co.uk/newsachive/>

		<ul style="list-style-type: none"> ○ <i>Lead Committee: Policy</i> • Enhance links to Farrell-linked 'PLACE' initiative <ul style="list-style-type: none"> ○ 5 Regional 'PLACE Hubs' linked to Branches M/5 ○ <i>Lead Committee: Policy</i> <p><u>CP20 Measure</u></p> <ul style="list-style-type: none"> • 20-20 Survey: <ul style="list-style-type: none"> ○ 2015: count tbc ○ 2020: 10% improvement 		
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Object B: Helping conservation			
<ul style="list-style-type: none"> Total subscribing members (Affiliate, Associate & Full) <ul style="list-style-type: none"> 2014-15: c.2200 2020: c.3300 (50% increase) Membership satisfaction: 10% improvement 5 MOUs 			
Aim		Action	
		'New Actions' Key: Priority/Year = T,M,L (equating to Top, Medium or Low)/Year 1-5	
B.1	<p>Extend recognition of and support for IHBC conservation standards and services: Expand awareness and recognition of specialist interdisciplinary conservation standards</p> <p>2020 Key Aims</p> <ul style="list-style-type: none"> Raise profile of IHBC member and sector activities, services and benefits Raise awareness of IHBC Associate member criteria as step towards multidisciplinary conservation accreditation as Full Member 	<p><u>Delivery Strategy: Use 'IHBC+' to generate lessons in developing sector awareness, understanding, collaboration and integration</u></p> <p>Maintain and enhance heritage networks and communications that support awareness and profile of skills sets of IHBC members and supporters, using strategies in A3 as appropriate.</p> <p><u>Office monitor & updates</u></p> <ul style="list-style-type: none"> Maintain and promote accredited member listing Highlight value of tax relief for relevant professional and specialist memberships <p><u>Monitored apart</u> (Primary source in parentheses)</p> <ul style="list-style-type: none"> Maintain and promote HESPR scheme (Object C) Establish HESPR as the key resource for clients seeking relevant conservation specialists, including through the 'caring for your home' online resource' (Object C) Raise awareness and understanding across networks and partner bodies of the character and value of IHBC membership criteria, and related standards, roles and activities (20-20 survey) Secure formal recognition by partner bodies of IHBC's membership criteria and standards (including National Occupational Standards and British Standard 7913) (MOUs: B.3) Encourage multidisciplinary skills and accreditation across IHBC membership and networks (B.3) <p><u>CP20 New Actions</u></p> <ul style="list-style-type: none"> Explore chartering in built and historic environment conservation as a benefit to the IHBC and our members <ul style="list-style-type: none"> Report T/3, Implement M/5 Lead Committee: F&R+ <p><u>CP20 Measure</u></p> <ul style="list-style-type: none"> Total subscribing members: Affiliate, Associate & Full: <ul style="list-style-type: none"> 2014-15: c.2200 	

CP20 ACTION PLAN: For details try searching IHBC's NewsBlog archive at <http://ihbconline.co.uk/newsachive/>

		<ul style="list-style-type: none"> 2020: c.3300 (50% increase) 		
B.2	<p>Lead and support heritage sector learning, education training and standards: Maintain and enhance heritage sector awareness of IHBC's conservation education and training resources and capacity</p> <p>2020 Key Aims</p> <ul style="list-style-type: none"> Extend awareness of IHBC's conservation activities, resources and standards Extend infrastructure for collaboration including through memoranda of understanding 	<p>Delivery strategy: Integrate LETS Liaison Officer role with practitioner support services Maintain, enhance and extend current services, guidance, benefits, support and opportunities, including proportionate public accessibility as informed by sector and member feedback.</p> <p>Office monitor & updates</p> <ul style="list-style-type: none"> Maintain publications: Context; Yearbook; Research Notes; Guidance Notes etc Annual Schools and associated actions, for example School partners and sponsors Maintain School 'Fringe' events or equivalent (including Council+) Maintain and enhance Gus Astley Annual Student Award (GASA) Maintain access to jobs opportunities and employment data Maintain Conservation Course Connection Days, and support and services for recognition Integrate interdisciplinary National Occupational Standards etc. with mainstream development, management and heritage-related practice Enhance web guidance Enhance guidance to prospective members Refine services, informed by member and sector feedback Recast online publications and related resources in line with CP20 principles Extend corporate links and partnerships to enhance membership standards and benefits <p>Monitored apart (Primary source in parentheses)</p> <ul style="list-style-type: none"> TeamStarter (including recasting WebStarter for new audiences) (C.3) Establish protocols to secure HESPR as an indicator in assessing sector needs and priorities (Object C) <p>CP20 New Actions</p> <ul style="list-style-type: none"> Agree a 'training priorities framework' across committee, Branch and other infrastructure <ul style="list-style-type: none"> Agreed 'training priorities framework' T/3; Implemented T/5 Lead committee: ETS Develop sector strategy to identify training needs and priorities <ul style="list-style-type: none"> Strategy M/2 or T/4 Lead committee: ETS Promote practice standards etc. by creating an accessible online resource for practitioners <ul style="list-style-type: none"> Toolbox operational T/1; fully operational T/3 Lead committee: Policy Explore targeted support for Conservation Officer Groups (COGs) <ul style="list-style-type: none"> Explore potential strategy M/3 Lead committee: ETS 		

		<p><u>CP20 Measure</u></p> <ul style="list-style-type: none"> Membership satisfaction: 10% improvement Y5 		
B.3	<p>Consolidate research base for expert, evidence-based advocacy: Produce independent information resources and tools, including evidence-based standards, guidance and specifications, to advise on effective, sustainable conservation in the built and historic environment</p> <p><u>2020 Key Aims</u></p> <ul style="list-style-type: none"> Consolidate expert conservation-specific research credentials in both public and private sector Develop 'research and influencing' role through collective events, notably tax reliefs 	<p><u>Delivery strategy: 'Advocacy: Demonstrate Value – Generate capacity'</u> Establish IHBC's role as a expert specialist research body uniquely able to advise on conservation practice, while shaping policy by bringing research into the political domain through advocacy.</p> <p><u>Office monitor & updates</u></p> <ul style="list-style-type: none"> Develop and extend Local Authority capacity and practice research, including benchmarks <i>etc.</i> Develop and maintain database of tenders for the HESPRR Develop and maintain IHBC's jobs resource and database Specify, in partnership as appropriate, values of having dedicated and proportionate conservation skills within all operations that impact on the historic environment <p><u>Monitored apart</u> (Primary source in parentheses)</p> <ul style="list-style-type: none"> Maintain and enhance Research note and Guidance notes strategy (A.2) Maintain the HESPR annual survey and the database it generates (Object C) Maintain a regular programme of 'horizon-scanning' strategy, of surveys and engagement, including with HESPR members (Object C) Survey sector to establish sector awareness and effectiveness of IHBC (A.3) <p><u>CP20 New Actions</u></p> <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> <i>Integrated research and advocacy programme T/5</i> <i>Lead committee: ETS</i> Explore funding for IHBC education post or related <ul style="list-style-type: none"> <i>Dedicated post (or equivalent) in place M/5</i> <i>Lead committee: ETS</i> Develop a strategy to deliver effective advocacy based on research outcomes, testing its implementation with a programme focussed on generating heritage-linked tax relief <ul style="list-style-type: none"> <i>Research and advocacy pilot programme (perhaps for Tax) completed T/3</i> <i>Lead committee: ETS</i> <p><u>CP20 Measure</u></p> <ul style="list-style-type: none"> 5 MOUs 		

Object C: Helping conservation specialists

Overarching measures (and, as appropriate, targets) for Year 5 (Y5):

- Total members: Associate and Full:
 - 2015: TBC (c.1000)
 - 2020: TBC (20% increase: 1200)
- Total HESPR members: 100% increase
 - 2014-15: 25
 - 2020: 50 (100% increase)
- Constitution updated in line with IHBC+ lessons
- IHBC Enterprises supported by full Business Plan

Aim	Action 'New Actions' Key: Priority/Year = T,M,L (equating to Top, Medium or Low)/Year 1-5	
<p>C.1 Underpin members' skills using regulation, accreditation, certification and advice etc. across public and private sectors</p> <p>2020 Key Aims:</p> <ul style="list-style-type: none"> • Enhance support for conservation accreditation processes • Develop, monitor and regulate professional standards etc. • Extend HESPR as a private sector resource • Support employment and career progress tied to IHBC membership 	<p>Delivery strategy: Manage membership standards Maintain and enhance practice standards in conjunction with disciplinary processes.</p> <p>Office monitor & updates</p> <ul style="list-style-type: none"> • Maintain and enhance membership applications processes and standards, including Full, Associate and Affiliate • Maintain and enhance infrastructure for disciplinary procedures including guidance and standards • Maintain and enhance CPD review processes • Embed Associate membership category effectively within and across all operations <p>Monitored apart (Primary source in parentheses)</p> <ul style="list-style-type: none"> • Enhance annual HESPR member surveys to evaluate satisfaction and state of sector (C.2) • Maintain and promote HESPR membership and benefits (C.2) • Adopt standards from relevant bodies as required (B.2 Toolbox) • Recognising the emphatic multidisciplinary nature of the IHBC membership, explore partnership opportunities with professional bodies to facilitate management of members (B.3) • Explore opportunities for developing HESPR membership and benefits (C.2) • Establish protocols to secure HESPR as resource for and indicator of practice standards (C.2) • Extend support infrastructure for career development and progress in the market place, including in the areas of career guidance, and professional practice in interdisciplinary and complex working environments (Object B) <p>CP20 New Actions N/A</p>	

CP20 ACTION PLAN: For details try searching IHBC's NewsBlog archive at <http://ihbconline.co.uk/newsarchive/>

		<p>CP20 Measure</p> <ul style="list-style-type: none"> Total members (Associate and Full) <ul style="list-style-type: none"> 2015: TBC (c.1000) 2020: TBC (20% increase: 1200) 		
C.2	<p>Extend member-specific services and benefits</p> <p>2020 Key Aims</p> <ul style="list-style-type: none"> Enhance membership profile, benefits and services informed by member satisfaction Integrate membership benefits and services with learning objectives Embed HESPR in the mainstream of client resources for those seeking skills for work on traditional and historic fabric and areas using National Occupational Standards etc. 	<p>Delivery strategy: Help members shape services - 'IHBC+' and 'LETS' Liaison Officer</p> <p>Alongside implementing relevant lessons from 'IHBC+' and the capacity of LETS Liaison Officer, use annual 'member satisfaction' surveys to inform priorities in CP20 and embed aspirations in business plans of committees and Branches.</p> <p>Office monitor & updates</p> <ul style="list-style-type: none"> Maintain and refine bursary provision and hardship support Maintain annual (at least) member surveys Embed LETS role in IHBC operations Maintain, and enhance as resources allow, services of and support from the National Office. Maintain and enhance Membership e-letter Maintain and enhance Committee and Branch support Maintain and develop Professional Indemnity resource Enhancing additional member benefits (for example legal and human resource advice etc.) Monitor relative benefits of different subscription models <p>Monitored apart (Primary source in parentheses)</p> <ul style="list-style-type: none"> Refine press/news/information management strategy (A.2) Enhance guidance for Associate membership category (C.1) Develop structured membership benefits/links to relevant professional bodies etc. (B.3) <p>CP20 New Actions</p> <ul style="list-style-type: none"> Develop a sustainable new core benefit/service (such as NewsBlogs or tender advertisements) <ul style="list-style-type: none"> 1 new core service T/5 Lead Committee: C+ <p>CP20 Measure</p> <ul style="list-style-type: none"> Total HESPR members: 100% increase <ul style="list-style-type: none"> 2014-15: 25 2020: 50 		
C.3	<p>Refine governance and management: Refine corporate infrastructure</p>	<p>Delivery strategy: Implement CP20 within sustainable charity and business models</p> <p>Maintain existing (2015) services, operations and compliance standards, articulated through new office manual, while also embedding lessons from 'IHBC+' across governance structures and</p>		

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	<p>across IHBC's charitable and commercial operations to ensure the same effective, credible and efficient standards that the IHBC expects of its members</p> <p><u>2020 Key Aims</u></p> <ul style="list-style-type: none"> • Develop CP20 so as to extend sustainable charitable and commercial funding and income streams • Embed lessons from IHBC+ • Enhance sustainable access to IHBC's charitable operations, activities and capacity by extending IHBC Enterprises' commercial and trading operations 	<p>corporate operations, including charity, funding, trading and related activities.</p> <p><u>Office monitor & updates</u></p> <ul style="list-style-type: none"> • Refine and extend opportunities for donations and Gift Aid • Articulate business strategies for sustainable growth and operations across IHBC • Extend capacity and potential of IHBC Enterprises as trading arm generating income, including extending its commercial operations where relevant to the sector (touring; merchandise, etc.) • Observe statutory and ethical standards and requirements, under oversight of Council, in line with current legislation and practice • Maintain and develop risk management procedures and systems to include carbon footprints • Enhance business management capacity in national office, including new office manual • Explore opportunities for efficiencies in and development support for National Office • Prepare strategic plan for future development • Promote IHBC Enterprises' conservation-related services through HESPR • Explore new 'conference call' communication opportunities • Implement strategy and processes for more inclusive, participative and pro-active structures across committee, Branches and any wider operations <p><u>Monitored apart</u> (Primary source in parentheses)</p> <p>N/A</p> <p><u>CP20 New Actions</u></p> <ul style="list-style-type: none"> • Consolidate office management with new office manual <ul style="list-style-type: none"> ◦ <i>Manual operational T/1</i> ◦ <i>Lead Committee: F&R+</i> • Establish charity infrastructure including fundraising committee, and secure funding <ul style="list-style-type: none"> ◦ <i>Established T/2; Functioning T/5</i> ◦ <i>Lead Committee: F&R+</i> • Implement lessons from IHBC+ <ul style="list-style-type: none"> ◦ <i>Updated constitution T/5</i> ◦ <i>Lead Committee: F&R+</i> • Develop IHBC Enterprises strategic business planning to serve IHBC <ul style="list-style-type: none"> ◦ <i>Business Plan agreed T/2, Operational T/3</i> ◦ <i>Lead Committee: F&R+</i> • Review 'Corporate Plan 2015-20', CP20', using sector surveys to measure success <ul style="list-style-type: none"> ◦ <i>CP20 reviewed T/3; 'CP30' T/4 (Draft); T/5 (Adopted)</i> ◦ <i>Lead Committee: F&R+</i> <p><u>CP20 Measure</u></p> <ul style="list-style-type: none"> • Constitution updated in line with IHBC+ lessons 	
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