



THE INSTITUTE OF HISTORIC BUILDING CONSERVATION

## **CORPORATE PLAN 2007-2010**

*June 2007*

### **GUIDANCE**

*This is the Corporate Plan of The Institute of Historic Building Conservation, for the period 2007-2010, and forms part of the institute's Business Plan. The corporate plan is a working document that guides our development, but neither prescribes nor proscribes it. Detailed actions and priorities do not appear in the Corporate Plan. Instead they are identified through the annual business plans of the Council's five advisory committees and the institute's thirteen branches. Those plans, together with this corporate plan, constitute the business plan of the IHBC.*

*Council oversees the strategic direction of its committees and branches through their respective business plans, using this corporate plan as a guide. Each committee or branch has representation on Council in the form of a council member, a Trustee of the IHBC, who is responsible, in the first instance, for the business plan corresponding to their branch or committee remit.*

*The Corporate Plan consists of three parts: vision, business analysis and forward strategy. This corporate plan:*

- i) provides the strategic guidance for the Council as it oversees the allocation of resources and operational priorities*
- ii) sits beside the business plans of the institute's constituent advisory and executive bodies – the institute's five committees and thirteen branches.*
- iii) shapes the actions of council, its committees and the constituent branches, assisting the structured development of the IHBC during what is recognised as a period of radical change in the sector*

***Approved at the IHBC AGM, June 2007***

# **A. THE CORPORATE STRATEGY 1: VISION AND OBJECTIVES**

## **A.1 EXECUTIVE SUMMARY**

### **A.1.1 WHO ARE WE?**

The Institute of Historic Building Conservation (IHBC) is the **UK professional institute representing specialists and practitioners working for the conservation of our historic places, the historic environment, and operating in the public, private and voluntary sectors.**

### **A.1.2 WHAT IS OUR VISION?**

To establish the IHBC as the **universally-recognised professional face of historic environment conservation**, with a membership founded on professional ethics and inspired by challenge, and contributing to place-making.

### **A.1.3 WHAT DO WE WANT TO ACHIEVE?**

To **secure the most sustainable benefits for and from our historic places through the contribution of the membership of the IHBC to place-making**, including in particular promoting training & education, professional standards & ethics, guidance, advice and practice, and the benefits, status and prestige of IHBC membership itself.

### **A.1.4 WHY DO WE WANT TO ACHIEVE IT?**

The future of the historic environment **is best served by having conservation specialists supported by an informed, independent and ethical organisation – a professional body – dedicated to their professional development and aspirations.**

### **A.1.5 OUR IDENTITY & UNIQUE SELLING POINT (USP)**

The IHBC is **the professional body supporting specialist interests in the conservation of historic places.** It is **multi-disciplinary in character, inter-disciplinary in scope, and pan-disciplinary in aspiration.**

### **A.1.6 OUR OBJECTIVES**

The IHBC is a registered charity and as such exists to:

- i) help people**, by promoting advice and understanding on the care and conservation, enjoyment and appreciation of our historic places for all, including its benefits, significance and management, because conservation relies on informed people
- ii) help conservation**, by supporting specialists, specialisms, and specialist interests in conservation, because conservation requires specialised care
- iii) help conservation specialists**, by supporting, encouraging and challenging members and prospective members of the IHBC, because conservation demands specialists informed, co-ordinated, scrutinised and inspired by a professional body

## **A.2 HOW DO WE ACHIEVE OUR OBJECTIVES?**

### **A.2.1. HELPING PEOPLE – A FRAMEWORK FOR CONSERVATION**

We help people by helping in the care and conservation of our historic places, through ensuring that we:

- i) promote informed advice and understanding**, to underpin opinions, policies and decisions that have an impact on our historic places
- ii) raise awareness** of the benefits, values and responsibilities of creating a sustainable future for our cultural places, including the social, economic and environmental benefits they bring, and the roles of specialists in creating that future
- iii) promote access, diversity and inclusion strategies that underpin conservation**, to secure the widest public enjoyment of that unique resource
- iv) encourage volunteering across the sector**, in particular within IHBC's own membership
- v) demonstrating a commitment to sustainable practice through our corporate activities** in accordance with our charitable obligations

### **A.2.2. HELPING CONSERVATION – A FRAMEWORK FOR PROMOTING STANDARDS IN CONSERVATION PRACTICE**

We will help conservation through supporting specialists in conservation. We will:

- i) promote best-practice and ethical standards in conservation**, to secure the highest standards in professional practice and ethics in the development, balance and application of specialist advice, guidance and information
- ii) encourage relevant education and training events and networks**, including supporting training across the sector and professional development within it
- iii) developing specialised understanding of conservation needs**, through investigation, research, policy and other strategic initiatives
- iv) providing informed advocacy & profile-raising for the sector**, to secure the widest awareness of and positive support for conservation as a sustainable strategy

### **A.2.3. HELPING CONSERVATION SPECIALISTS – A FRAMEWORK FOR SECURING EXCELLENCE IN OUR MEMBERSHIP**

We will help conservation specialists by promoting our membership standards and services, including the services of our members. We will:

- i) support and regulate professional operations within our membership**, to ensure that our members adopt the highest standards of conservation, and the sustainable benefits it can bring, so representing credible excellence in conservation
- ii) provide membership benefits and services**: investing in services that encourage, attract, support, inform, promote and advance the work of specialists, leading by example and by challenge
- iii) secure corporate efficiency**: operating the IHBC as a successful charitable business organisation working to the highest effective standards of corporate governance, regulatory standards, fiscal management and operational efficiency
- iv) add value and capacity** to the Institute's resources, by developing consensus, building partnerships and identifying synergies in the business and corporate operations, membership services and infrastructure

## **B. THE CORPORATE STRATEGY 2: BUSINESS ANALYSIS**

### **B.1 WHAT ARE WE, AND WHAT DO WE DO?**

The IHBC is an organisation with many roles, including operating as:

- i) a registered charity**, with its head office in England, No 1061593, and a **company limited by guarantee** (and without share capital) **operating in the not-for-profit sector**, No 3333780
- ii) a professional institute**, with responsibilities for standards and professional development in its sector, including in areas of education, training, ethics, discipline, policy and advocacy
- iii) a civic benefit**, encouraging public access to historic environment advice, issues, guidance and practice at every level of practice, specialist and non-specialist, professional and lay interest
- iv) a membership organisation**, providing dedicated services through its central national resources and its Branches, to about 1400 full professional members working in all aspects of the conservation of historic places, and with some 200 other members subscribing to our services and sharing our ethics and philosophy
- v) a research body**, promoting, shaping and as necessary implementing research and related funding programmes that shape, inform and support the understanding, management and enhancement of the historic environment
- vi) a voluntary organisation**, adding value to the sector through the voluntary work of our extensive core of active members, mostly working professionals, who gift their services and skills to advance the conservation of the historic environment and its benefits
- vii) an advisory resource**, providing information, guidance, technical knowledge, input into public policy development, and other resources for the support of the historic environment
- viii) an internationally recognised and respected professional organisation, with an membership that spans the globe**, that could lead the world in providing a framework for supporting historic environment conservation specialists
- ix) collectively, the IHBC is a business service**, operating in the historic environment sector, with a turnover of c.£200,000 (in 2006). It is served by 3.5 FTE executive staff (in 2007), supported by consultants approximating to 1 more FTE. The Institute also benefits from a corps of volunteers that contributes an estimated (in 2006) equivalent of another 10 FTE staff working for the sector.

### **B.2 WHAT AND WHO DO WE REPRESENT?**

The IHBC **represents the widest public interest in our historic places** by promoting the benefits of conservation through informed and specialist advice, approaches and actions. It secures standards in conservation advice through promoting professional principles such as skills, ethical practice and continuing professional development.

The IHBC **represents the interests of its members** insofar as their work can help secure the full benefits of historic environment conservation. It does this by **informing the specialised work of** those who contribute to conservation, whether as **dedicated conservation specialists** (e.g. conservation officers), **or specialists with dedicated conservation skills** (e.g. architects with conservation specialisms). The IHBC supports their work primarily through monitoring, promoting and serving the professional activities of its membership.

The IHBC also aspires to **represent conservation priorities across the disciplines**, skills, roles and activities that secure the historic environment in all its complexity. Such **representation is validated by:**

- i) the IHBC's constitutional responsibility** to put the consideration of the historic

environment as a whole – including, by extension, the widest public interest in it – before any particular professional or specialist interest

**ii) the inter-disciplinary membership criteria, the competences**, which require of Full Members an understanding of the cycle of conservation (see 'Final Report for the IHBC and the IFA On the Consideration of Various Options Relating to Joint Working', see <http://parn.ihbc.org.uk>) and the corresponding obligation to balance understanding and management with change and intervention in historic places

**iii) the multi-disciplinary skills and formal training** typical of many IHBC members

**iv) the cross-sector membership** of the institute as a whole, which extends across the practical conservation of materials and artefacts, archaeology, architectural, landscape and garden history, planning, law, surveying, architecture, design, project management, as well as educational roles attached to many of these disciplines.

In affirming the range of specialist skills underpinning successful conservation, and the importance of balancing such advice, the IHBC applies ethical standards in conservation across traditional disciplines as well as, where appropriate, within them. As such **the institute may be characterised as 'pan-disciplinary'**. The only other built-environment body considered to have a comparable 'pan-disciplinary' character is the Urban Design Group. In this way each breaks from the traditional model of single-discipline professional bodies.

The pan-disciplinary character of the IHBC is distinctive, but this does not diminish the Institute's **core responsibility to that part of the membership that specialises in the duties of the planning authority's historic environment conservation officer**. This role is represented by the relevant subset of occupation recognised by National Statistics, SOC 3551 (Standard Occupational Classification 2000, a subsection of Conservation and Environmental Protections officers). Indeed the pan-disciplinary basis of our membership criteria are rooted in the skills needs of conservation officers.

### **B.3 HOW DID WE START?**

The IHBC **evolved out of The Association of Conservation Officers (ACO)**, which was founded in September 1981 by a dedicated **group of volunteers** mostly working as local authority conservation officers. In **1997 the ACO was reconstituted as The Institute of Historic Building Conservation (IHBC)**, the professional institute representing specialist interests in the conservation of historic places.

Both the membership of the IHBC and **its core operational structures and membership benefits originate in the ACO**. These include a devolved and dispersed voluntary infrastructure providing high-profile national initiatives (such as the Annual School, the *Yearbook*, the house journal *Context*, the web site and consultation advice etc.), operating in conjunction with locally-managed membership benefits operated through our Branches. In the business plan of the IHBC for 2003, the then chair, Eddie Booth, wrote that: 'The future is a bright one for the Institute if we can convert from a low cost-base association with voluntary officers to a more professionally-administered organisation with a fulltime staff'.

The 2004 'forward strategy' led to the appointment in October 2005 of the institute's first full-time employee, the Director, as its chief executive officer. Since then there has been ongoing re-organisation, development and investment as the Institute has re-ordered its financial base, operational structures, services, benefits and forward planning. **In 2007 the IHBC has 3.5 staff, including the Director, working under the scrutiny and guidance of the Council.**

## **B.4 HOW DO WE ORGANISE OURSELVES?**

The legal and corporate operations of the IHBC are guided first by the **Memorandum and Articles of Association (M&A)**, which are carried on the Institute's web site. As a corporate body the Institute is a **legally incorporated charity and company governed by its trustees, who are elected to its ruling Council at the Annual General Meeting. New trustees are provided with a Trustees Guidance Pack following election.**

The Institute's trustees **include elected officers, with specific posts and associated portfolios, and nominations from the Institute's constituent branches**, national and regional. In addition a number of officers appointed by council - including the President - are invited to council meetings as specialist advisers.

A series of **five committees, each chaired by a trustee, provide advice and recommendations to Council.** These committees are

- Finance and Resources, responsible for business human resources,
- Membership and Ethics, responsible for membership regulation
- Educations Training and Standards, responsible for professional development
- Policy, responsible for technical guidance, and
- Communications and Outreach, responsible for public profile and accessibility

The **national office provides executive and enabling support and services for corporate programmes in line with the business plan.** The **branches provide local services and support networks**, largely educational and advisory, and as such **lie at the heart of how we deliver our membership services.**

The **annual cycle** of the organisation centres on:

- The AGM, attached to the Annual School, usually in June
- The Financial Year, which ends at the end of September each year, and
- The renewal of membership subscriptions, which takes place in April

Publications, business meeting and other operations typically organise themselves around this cycle.

## **B.5 WHAT RESOURCES DO WE HAVE?**

The IHBC, like most professional institutes, is founded on a significant legacy of voluntary activity dedicated to supporting the highest professional and ethical aspirations of its discipline. Voluntary operations have, typically, taken place with minimal central guidance or support. This has been partly due to limited resources, and partly because of the organisation's voluntary infrastructure. Built around its branches, the voluntary network has a proven capacity to deliver programmes and services of the highest calibre. This branch infrastructure is respected and valued both inside and outside the organisation.

**i) Executive infrastructure:** The national office of the IHBC, reflecting the professional, low-key and low-density nature of the membership, consists a small and geographically dispersed base, staffed by professionals from the sector and supported by an administrative resource, the business office, as well as free-lance consultants.

**ii) Income:** The annual income of the Institute for the financial year ending in September 2006 is approximately £210,000. Following expansion of its central executive, and in line with its terms as charity and business in the not-for-profit sector, most of its income is allocated under expenditure on on-going operations.

**iii) Volunteers:** The IHBC benefits from a pro-active voluntary base, currently around 200 people (or nearly 15% of the membership) extending across the United Kingdom. This is organised around and managed through the five national Committees, working to Council, and the thirteen regional Branches. Estimating an

average output by each active member at 5% of FTE, IHBC volunteers contribute to the sector an estimated additional 10 posts, or, based on average membership salaries with on-costs, about £300,000 of investment each year.

**iv) Goodwill:** The good name and standing of the IHBC is one of the most valuable resources of the Institute, and includes an international standing and role that belies its comparatively small membership. The corporate profile achieved by the dedicated body of members and volunteers, in particular in England, is remarkable. Any forward plan must advance the reputation of the Institute, distinguishing it as a responsible body enhancing its reputation through taking advantage of its increased executive capacity.

## **B.6 WHERE DO WE WORK, AND HOW?**

The operating environment of the IHBC and its members – our market – is extremely complex. Throughout its history, the **IHBC's holistic perspective on conservation is founded on a complex community of interests** that may vary between disciplines and areas, but always retain their fundamental support for the management and creation of places of quality.

### **B.6.1 GEOGRAPHICAL**

The **IHBC is a UK body**, and its members must serve under and inside a variety of different legislative, regulatory and government operations that range from centralised government (e.g. DOENI) to organisations with extensive delegated regulatory powers (e.g. English Heritage). Consequently:

- i) IHBC's codes, standards and guidelines etc. must be applicable across the different regions and nations**
- ii) IHBC's operations and communications must work effectively** across devolved interests
- iii) IHBC's role can vary according to the nation, region or area within which it is operates, so it must adapt its strategy to accommodate the priorities in its constituent regions and areas**

While a UK body, there is a significant interest in the Institute outside the UK, in particular in Ireland and Europe, but also more widely. This is reflected in the internal membership of the institute.

### **B.6.2 POLITICAL**

The IHBC's membership, their outputs and priorities, sit across the categories recognised in government's **departmental structures**. Consequently:

- i) there is no single government department or portfolio** to which our members work (members in local government service and private practice typically operate within core planning services, while those in central government generally operate under cultural remits, such as those in English Heritage working to the DCMS)
- ii) the government's training infrastructure of Sector Skills Councils (SSCs) read across the institute's membership's needs**, with a minimum of three SSCs covering our core priorities: (Construction Industry Council, for development; Landor, for land management, and Creative and Cultural Skills (CCS), for its core cultural remit), and easily expanding to nine covering our general interests
- iii) the multi-disciplinary nature of conservation is reflected in its cross-sector benefits, and sustainability provides the most substantial framework for registering the full value of conservation and the outputs of our members**

### **B.6.3 PROFESSIONAL**

The members of the IHBC typically have **skills and interests that straddle traditional disciplines and educational structures**. Consequently:

- i) dedicated conservation **interests are represented in a wide number of professional bodies** (architecture, archaeology, planning, building surveying etc) with parts of these bodies interpreting the IHBC as either simply reflecting their own operations or repeating them
- ii) many of IHBC's **members possess and promote multi-disciplinary training and skills** in line with the pan-disciplinary aspirations of the IHBC
- iii) IHBC's historic core membership, the local authority conservation officer, is a **relatively modern professional role**, occupied by professionals with a wide variety of professional backgrounds – academic, planning, architecture, surveying or, increasingly, those entering the conservation without primary training in another built environment profession – yet all can carry out similar roles
- iv) IHBC's current membership, is **dominated by the traditional built environment professions**, notably surveying, planning and architecture, and its work frequently focuses on making conservation priorities accessible to those disciplines
- v) a smaller proportion of IHBC members specialise in aspects of **disciplines either too small or too specific** to have dedicated professional or practical support, and so look to the IHBC to provide assistance

#### **B.6.4 PHILOSOPHICAL**

IHBC's conservation is **modern conservation**, distinguished by the variety of intellectual traditions within which it has evolved:

- i) it has its **origins in the architectural cum archaeological investigations and regenerations of the renaissance** tradition, culminating in the professionally-inspired restoration philosophy of the SPAB
- ii) it is **inspired by the planning traditions of Geddes** as much as the more established architectural conservation traditions in architecture
- iii) more recently it encompasses the **social perspectives that highlight the importance of the cultural benefits of conservation**, including academic disciplines such as architectural and landscape history, archaeology and art history, articulating and applying their values within wider conservation interests
- iv) simultaneously, the IHBC's conservation recognises the **public interest in and benefits from our historic places**, already represented by national and local heritage and amenity societies
- v) it also recognises the **widest community and public responsibilities in the management of place through the planning system**, including requirements for notification, involvement, consideration and response
- vi) even more recently, it asserts the **manifold environmental benefits** of historic environment conservation, including sustainability, reducing carbon emissions, waste minimisation, etc

#### **B.7 WHO ELSE HAS AN INTEREST IN OUR WORK? PARTNERS AND COMPETITORS**

Given the IHBC's wide constituency of interest across historic environment conservation, there are many bodies, groups and interests that can and do partner, link and compete in our sector. While the spectrum is too complex to characterise at this time, the guiding principles, strategies and models identified in part C of the corporate plan will frame Council's direction. In general, and reflecting the limited capacity of the sector, the IHBC's core business philosophy will be to **look on all sector interests as prospective partners in building capacity, and not as business competitors challenging markets**. In particular we will seek to operate and develop close relationships with other professional bodies and organisations with comparable specialist interests.

Some conservation-related disciplines have only limited professional support. The IHBC will



**focus resources on assisting those areas requiring an improved professional infrastructure**, including architectural history, conservation officers and comparable specialists, heritage and project management, as well as other inter-disciplinary interests.

## **C. THE CORPORATE STRATEGY 3: GUIDING STRATEGIES & MODELS**

### **C.1 HOW WILL WE MAKE DECISIONS?**

Council, officers and staff will direct the Institute in accordance with the Business Plan, including both the Corporate Plan and the business plans of its advisory committees. Given the IHBC's rapidly changing business environment, no single corporate strategy can be expected to address our needs. **Consequently, decisions will be guided by the relative merits apparent in the strategies and models identified by the Business Plan.**

### **C.2 HOW DO WE ACCOMPLISH OUR OBJECTIVES 1: WHAT ARE OUR STRATEGIES?**

The IHBC does not have the resources or capacity of major built environment professional organisations or the national heritage bodies. However the Institute does have an unequalled voluntary network of skilled and dedicated specialists working across the UK, an admirably low cost base, and a diverse and flexible business infrastructure. Consequently, the IHBC's corporate development strategy is to build capacity and expand operations by focussing on its existing strengths, refining its operations and adapting ideas from other areas as appropriate, including:

- i) Vesting overall direction and scrutiny of the IHBC in the Council**, with agreed devolution of executive powers to branches, committees and the national office as appropriate.
- ii) Adapting innovative business models** and approaches best suited to our scale, circumstances and operations (*e.g.* de-centralised, cost-effective office infrastructure; flexible employment patterns)
- iii) Maximising values of voluntary contributions** and support networks, in particular through contributions to branch and committee operations
- iv) Empowering its committees**, through their Chairs, to manage and promote advice and representation appropriate to the national aspirations and resources of the institute
- v) Re-investing in the membership** by refining and consolidating membership structures and criteria, by identifying, voicing and supporting its needs, using the benefits from our services to advance advocacy, education and promotion of conservation, both nationally and through our international membership
- vi) Consolidating the future expansion of the institute by applying and adopting recognised standards of corporate and business management**, securing and adopting appropriate professional advice, and establishing such networks and operations as are required to ensure the efficient progress of the organisation
- vii) Developing partnerships** and alliances across the sector

### **C.3 HOW DO WE ACCOMPLISH OUR OBJECTIVES 2: WHAT MODELS DO WE USE?**

To implement the corporate strategy, the Institute will be informed by the following models:

- i) To secure appropriate governance**, the IHBC will take overall direction from a **Council consisting of Nominated (Branch) and Portfolio-based (Committee chairs and elected Officer) members**, in accordance with our Memorandum & Articles. Council, Branches and Committees will be supported by the **national office**, and will be charged with the implementation of the business plan. The effectiveness of the model will be monitored through appropriate evaluation tools such as risk assessment, corporate best-practice and fiscal analysis.
- ii) To ensure an efficient and low-cost executive infrastructure**, the IHBC will adopt an interim programme of developing a de-centralised **'virtual' national office**, using home-working, flexible employment, IT developments *etc.*, to the extent that

- they are cost effective and operationally efficient. This approach will be monitored.
- iii) To establish and consolidate the IHBC's 'brand' of ethical professionalism, we will **enhance the rigour, process, clarity and scrutiny of our membership**, encouraging professional standards across the sector - and in particular for our own members - through initiatives such as promoting CPD.
  - iv) To support membership services we will **encourage branches in their delivery of local services through our voluntary network**. This will require centralised support from the national office, to provide corporate focus, national recognition and greater efficiencies and capacity. The strategy will require both **dedicated resources** for those most in need of support, and the **evolution of a franchise model** to encourage activities in line with corporate needs.
  - v) To secure dedicated and informed committee advice to Council we will continue to support and develop skills-based advisory groups, its **Committees**, with specific remits, monitored through Committee Business Plans (formerly the Committee Registration Forms). To ensure appropriate skills in Committees, **encouraging voluntary 'lay' members** (i.e. specialists who may not be eligible for IHBC membership but whose skilled contributions would be invaluable) will be a key duty of Committees.
  - vi) To promote better **understanding and valuing of the sector**, we will develop **viable platforms for delivering services such as research and business services**, building partnerships and capacity allowing IHBC to secure conservation in partnership with stakeholders. The platform will be developed around both the research programme, associated with the recent appointment of the IHBC's Projects Officer, and the business services, linked to the development of the institute's administrative resources. Already in 2007, following the recommendation of our professional advisers, the organisation is looking to establish a business services operation.
  - vii) To create a more **substantial professional infrastructure** for our members, the IHBC will build **pro-active partnering links** across the diverse educational, corporate, environmental and economic interests. Already we are active in a number of core sector bodies - Heritage Link, Historic Environment Group, Built Environment Forum Scotland, regional Historic Environment Forums, among many others (more). Future activities will develop links with bodies to help secure implement specific projects to further IHBC's wider support for the historic environment. Already we are chairing and leading Urban Design Alliance (UDAL) through its evolution from design body to built environment professional link body, and, like its other members, hope to benefit from its revived capacity and potential for creating partnerships.
  - viii) Given the geographically and operationally dispersed staff and officers, the IHBC will adopt **corporate strategies required maintain an effective organisational direction**. Such strategies will include reviews by council, to maintain corporate direction, training programmes, to secure effective personnel, and HR support initiatives, to ensure that the core obligations of the Institute are met.
  - ix) In addition the IHBC will develop, advance, promote and explore **such other activities and operations** - independently and in partnership - as Council considers appropriate for the development of the constitutional and corporate objects of the organisation. As these are directed towards the conservation of the historic environment, any benefits arising from such operations will provide effective public benefits.

#### **C.4 HOW DO WE ACCOMPLISH OUR OBJECTIVES 3: WHAT DO WE DO NOW?**

The IHBC will work to the aspirations identified in the corporate plan (Part A) by applying the over-arching strategies (Part C) in light of the business environment (Part B). Detailed strategies are not part of the current consultation because immediate resource allocations for the current financial year (2007 - 08) are already in place. However the corporate plan will be used to guide the decision-making of council in line with the guidance given at the opening of this document.