



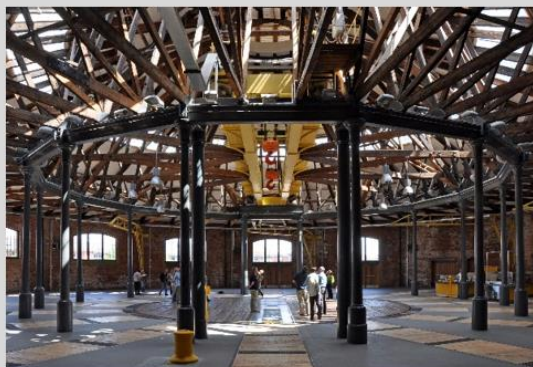
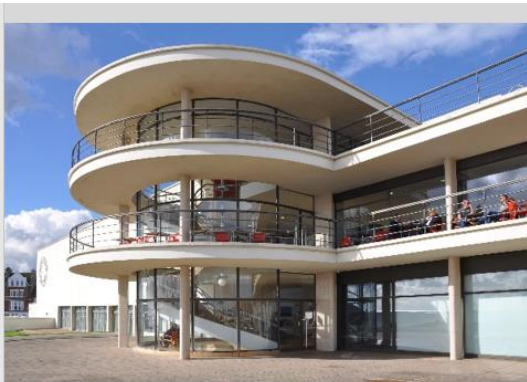
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# #IHBCPetitionforCharter

## Next steps in the IHBC's exploration of a Petition for Charter: Informing a Resolution to the IHBC's 2024 AGM

*'Covering Report'*

10 March 2024





## **Executive Summary**

The IHBC is ready to take the next step in exploring a Petition for Charter. This means that we formally ask the [Privy Council Office \(PCO\)](#) – government’s administrative support in the chartering process – what it thinks of the IHBC’s prospects should we submit a petition.

The PCO’s guidance advises that such enquiries are made through ‘a memorandum’ – sometimes referred to as a ‘Letter of Intent’ – outlining the prospective petitioner’s work as well as the reasons for and the benefits of a Royal Charter both to us and to society generally. The terms of the memorandum are outlined in the extract from the PCO’s guidance listed at the end of this paper.

The formal Resolution to our members at the IHBC’s 2024 AGM, on 30 April, asking for member support for the submission of the memorandum and already agreed by the Board, is as follows:

*That the IHBC Board submit a memorandum (informally referred to as a ‘Letter of Intent’) to the Privy Council Office as described in the covering report submitted to the AGM, to determine any prospective barriers to and/or requirements arising in any Petition, and return to the membership with recommendations and guidance as appropriate.*

The wording of the resolution was discussed and approved by our Petition for Charter Working Group, IHBC Council and finally, the IHBC Board of Trustees.

This is the report informing that Resolution. For adoption, the Resolution requires a simple majority of voting members at the AGM.

The wider petition consultation process will continue across 2024. Everyone – not only IHBC members – is encouraged to offer thoughts, proposals, concerns, support and suggestions [HERE](#). Of course, these and other submissions will inform all stages of our exploration of a petition as outlined on our [#IHBCPetitionforCharter](#) web hub and resource at [IHBC Petition for Charter](#)

## **The IHBC and a Royal Charter: Where are we?**

After more than a year of constructive internal consultation and formal and informal engagement with the sector, we can now better see the case for a Charter for the IHBC. But we cannot answer some key questions without more substantial guidance from the Privy Council Office.

We now know that the award of a Charter would help the IHBC tie our activities and ambitions closer to the machinery of government in a variety of ways that could help us do our job better. Chartering by the Privy Council is described there as a ‘mechanism through which interdepartmental agreement is reached

on items of Government business'. As such it offers us:

- **Government recognition as a body:** Formal recognition of the IHBC by government through the endorsement of the Privy Council, supported by its Office, would help advance long-standing advocacy and ambitions in our corporate plans to help people, help conservation and help conservation professionals
- **Government recognition as a professional body:** The IHBC affirms its status as a professional body, but a charter would confirm it, because the charter will only be awarded if the machinery of government itself authorises the objects and role of the petitioning body.
- **Government recognition of the sector:** A Charter would add weight to the specific place of historic and built environment conservation in society as a whole: by its nature a charter would reinforce the public benefit, public good and public interest in conservation generally. Indeed the IHBC could be the first chartered body representing these public interests in its title, formalising the place of built heritage in a sustainable economy.
- **Government recognition specifically of the IHBC's principles of conservation practice:** Through all of the above, a Charter would also formally endorse the operations of the IHBC's distinctive approach to accrediting interdisciplinary conservation competence of a conservation professional, as a charter would confirm its practice as a 'unique discipline'.

Taken together these would add the credibility and weight of government endorsement and authorisation to the work that we do for our members, to the work of IHBC members of all categories, and to the work we all do on behalf of the wider sectors and society with which we engage.

### **The IHBC and a Royal Charter: What next?**

The formal process towards a Charter is in three stages;

1. submission of a memorandum (AKA a Letter of Intent) to the PCO,
2. making the Petition to the Monarch via the PCO,
3. in the event of success, the granting of the Charter.

Voting Members of the IHBC will be asked for their support before progressing to the next stage. We will only actually petition for chartered status if there is overwhelming support from members. The above resolution to be voted on at the 2024 AGM will, if passed, authorise stage 1/ - the submission of a memorandum to the PCO. Their response, which we would expect to receive

later this summer, should 'give advice on the likely chances of success of a formal Petition' and what measures, if any, we may need to take to strengthen our case such that stage 2/ - the making of a petition – would succeed.

### **Background 1: Member feedback and response to date**

Across 2023, IHBC Branch, Branch-supported and national events and activities all advanced under the #IHBCPetitionforCharter exploratory programme. The process was supported by the development of a web hub & resource, noted above, launched in May 2023. Officer, member and network feedback – including senior officers meeting with Branches, members and networks – was consolidated through an overarching, member-focussed survey in the Summer and early Autumn of 2023.

Based on the information available then, the survey produced a significant and broadly positive response with:

- 67% seeing the benefits
- 19% needing further details and clarification
- 14% not supporting the idea.

Throughout the exploratory work, we received extensive support from members and networks for the principle of a Charter, as well as numerous queries, some of which are still under investigation. We know we have much work yet to do – including addressing points raised around chartering individuals, though currently that is not an option – but as yet we have identified no barriers that might be considered insurmountable.

We have also recognised some risks, though many can only be fully understood and addressed when we hear in more detail the advice of the PCO. These include:

- Specific process costs, to the IHBC and to members, both direct and indirect
- Implications for members and the wider sector, from careers and salaries, to recognition and status
- Impacts on the IHBC's wider support and activities.

Overall our consultations reinforced the broadly positive feedback. Indeed open-ended discussion on the Resolution at our last Council, on February 27, again saw no substantial objections, while many ongoing concerns can only be answered by the proposed serving of the memorandum. Informed by that, and this paper, an updated 'FAQ', responding better to the issues raised in the survey is being prepared for our web resource.

We now believe we have brought this initial informal exploratory phase to its logical fruition. We now need to engage formally with the PCO through the



memorandum in order to make further progress towards a Charter. In line with the Resolution, now seems to be the right time to ask the PCO for its guidance and detailed formal advice on our prospects.

## **Background 2: Why, and how, are we exploring Charter**

The IHBC has raised the question of seeking a Royal Charter for the most fundamental of reasons: to find out if the institute can do its job better as a chartered body.

To answer that question, we needed first to investigate the chartering processes and their implications for the IHBC, for our members and for our sectors. This started with the formal agreement by our members to a commitment to explore chartering in more detail, which took place with the adoption at the 2020 AGM of our [Corporate Plan 2020-25 \(CP25\)](#).

The commitment made in that *Corporate Plan* demanded an initial scoping examination of the processes linked to making the case for a Charter, as well as prospective benefits and barriers. We started by informally sounding out the opinions and thoughts of our members especially, as well as those of wider sector partners and networks, as support from all would be critical to any case for a Charter.

Following such scoping investigations of the Charter process by IHBC trustees and officers across and before 2022, all somewhat delayed by the pandemic, the Board agreed to the establishment of an informal '*Petition for Charter Working Group*' ('PfcCWG'). This now operates as an advisory body under the Board's oversight, and includes trustees and senior non-members representing key networks, as well as executive support from the IHBC's Director and Administrator.

In early 2023 the IHBC recruited David Williams as an independent consultant to complement the existing explorations. David's first tasks were to add new detail and understanding to the initial scoping of Charter processes, practicalities and networks, as well as to develop accessible guidance on the process and add resources as required. He was also asked to explore more formally and in more detail the processes and issues direct with a range of relevant bodies and players. David Williams made his initial presentation to the IHBC's Council on 30 March 2023, an event that also marked the formal start of his independent scoping of member interest and issues.

This paper has been informed and shaped by that work.

## **Summary conclusion**

We have already engaged informally with the PCO and the supporting networks. Now we need to secure more substantial advice direct from the PCO, and the Board is looking to our members to support the serving of the memorandum by

voting for the AGM Resolution as drafted above. Further advice on on-line attendance at the AGM, voting rights and proxy voting will be published shortly. Make sure your voice is heard!

## References

More context, including links to our [Corporate Plan 2020-25 \(CP25\)](#) and to what a Royal Charter is and entails, is available on our web hub and resource at <https://petitionforcharter.ihbc.org.uk>, tied to the social media tag #IHBCPetitionforCharter. There is more detailed guidance on the application process from the [Privy Council Office \(PCO\)](#), including the headlines sought in the memorandum to the PCO that secures its advice, noted below.

### **Privy Council Office: Guidance on the 'memorandum' or 'Letter (or 'Statement') of Intent'**

The Privy Council Office guidance on securing 'advice on the likely chances of success of a formal Petition' [HERE](#). This notes that:

*'What is required for this purpose is a memorandum covering:*

- a) the history of the body concerned*
- b) the body's role*
- c) details of number of members, grades, management organisation and finance*
- d) the academic and other qualifications required for membership of the various grades*
- e) the body's achievements*
- f) the body's educational role both within its membership and more widely*
- g) an indication of the body's dealings with Government (including details of the Government Department(s) with the main policy interest, or which sponsor(s) the body, together with contact details of officials who deal with the body), and any wider international links*
- h) evidence of the extent to which the body is pre-eminent in its field and in what respects*
- i) why it is considered that the body should be accorded Chartered status, the reasons why a grant would be regarded as in the public interest and, in particular, what is the case for bringing the body under Government control as described above.*

See more at [Applying for a Royal Charter - Privy Council \(independent.gov.uk\)](#)