



· INSTITUTE · OF · HISTORIC ·  
BUILDING · CONSERVATION

*The home of the conservation professional*

**THE INSTITUTE OF HISTORIC BUILDING CONSERVATION**

*'The home of the conservation specialist'*

**Corporate Plan 2015-20  
(`CP20`)**

**CONSERVATION ADVOCACY AND INFLUENCE**

*'Demonstrate value - Generate capacity'*

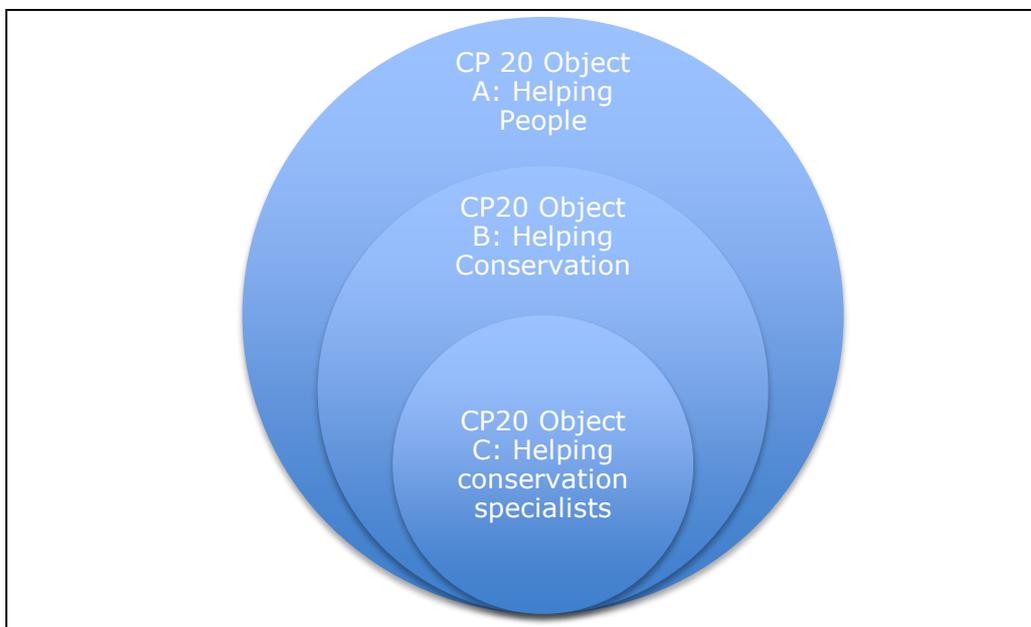
**Approved at the AGM of the IHBC: 19 June 2015**

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## INTRODUCTION

1. This is the corporate plan of The Institute of Historic Building Conservation (IHBC) for the period 2015-20, here abbreviated as 'CP20'.
2. The IHBC is the professional body for built and historic environment conservation specialists working within and beyond the UK.
3. CP20 outlines the IHBC's duties and obligations in the context of its wider corporate aspirations to support conservation, and identifies how the IHBC will respond to those aspirations in light of the institute's extensive engagement and collaboration with members, partner interests and relevant players.
4. CP20 will guide the IHBC over the coming years as it develops integrated responses to its aspirations while also continuing to serve its charitable and company objects, A to C, as follows and as in our draft Action Plan below:
  - A: Helping people
  - B: Helping conservation
  - C: Helping conservation specialists



**Illus. 1: Integration of the IHBC's objects**

5. The narrative for CP20 is 'Conservation Advocacy and Influence: Demonstrate value – Generate capacity', to encourage our co-ordinated response to the issues raised by our membership, especially in recent internal surveys, and in wider sector analysis.
6. This narrative recognises that evidence-based statements on the value of conservation are the best way to underpin effective practice, standards and advocacy.

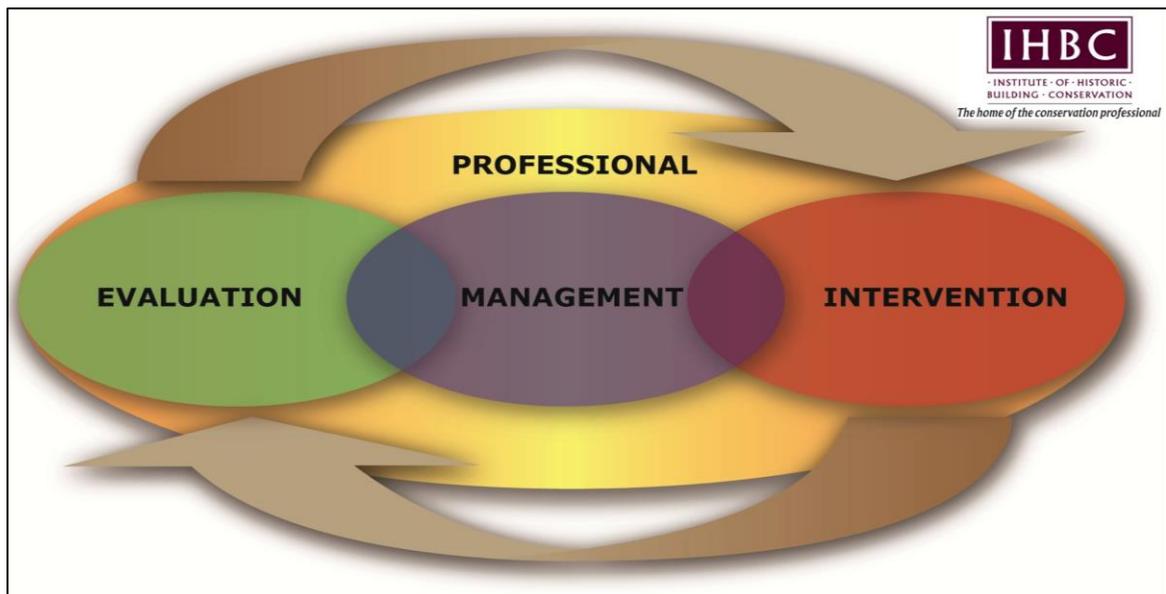
## CORE STATEMENTS

7. Vision: what is to be achieved? The IHBC will be recognised within and beyond its operating sectors as the lead body supporting built and historic environment conservation practitioners, their specialist interests and ethical objectives.
8. Rationale: why seek such recognition? The future of historic fabric and places is best served by recognised and skilled conservation specialists supported by an informed, independent and ethical specialist body – the IHBC – dedicated to their skills development, career aspirations and ethical principles and objectives.

9. Mission: how will we secure this recognition? Sustainable benefits for and from valued places demand the skills that IHBC members offer, so the IHBC's service should focus on the promotion of the value of the input of appropriately skilled members.
10. What is special about IHBC - the Unique Selling Point (USP)? As the body that supports specialist interests in the conservation of valued and historic fabric and places, it is multidisciplinary by nature, interdisciplinary in scope, and captures pan-disciplinary aspirations through the collective of its membership.
11. Core strategy: The IHBC will focus operations on delivering the twin and complementary objectives of demonstrating value and generating capacity. As such the IHBC will:
  - Serve as a specialist hub and service provider for built and historic environment conservation support, and
  - Support a membership for whom conservation is:
    - i. Underpinned by ethics and standards
    - ii. Inspired by challenge and ambition, and
    - iii. Delivered through the informed, effective and sustainable management of change in places.

**THE IHBC**

12. Who we work for: The IHBC works to represent, regulate and support as appropriate anyone who contributes to the conservation of valued and historic fabric and places.
13. The IHBC and good conservation practice: The IHBC promotes good conservation practice by shaping relevant processes and practice across and within the disciplines that secure conservation outcomes. The institute operates these principles in the context of its model 'IHBC Conservation Cycle' as follows:



**Illus. 2: The IHBC's Conservation Cycle**

14. The IHBC works to the principle that the proper application of the right skills, at the right levels, and at the right points in the management of change, will secure the most effective and efficient conservation. These interdisciplinary, multidisciplinary, cross-disciplinary and pan-disciplinary aspects of conservation practice reinforce the Institute's responsibility to the interests of under-represented specialist interests

relevant to conservation. Among these are conservation specialists in planning authorities and in the private sector; practitioners in disciplines and roles linked to conservation accreditation, as well those shaping conservation outcomes, including non-specialists, client bodies, commercial and political players and others.

15. Our roles: The IHBC operates in diverse roles, including as a:
- a. Charity, serving the non-profit sector
  - b. Company, observing appropriate corporate standards including in the operation of its trading arm, IHBC Enterprises
  - c. Membership body, generating benefits for those subscribing to its services
  - d. Voluntary organisation, adding value to the society and the sector
  - e. Civic resource, encouraging sustainable public access to and enjoyment of the historic environment
  - f. Centre of expertise, offering advisory services and resources to specialists and the wider public as appropriate, providing information, guidance, technical knowledge, input into policy development and implementation
  - g. Research and advisory body, that promotes, shapes and as necessary implements research and related programmes, altogether operating as:
  - h. Specialist body supporting built and historic environment conservation interests, internationally recognised and respected, responsible for advising on, regulating and promoting sustainable practice standards by encouraging career progress and skills development and interacting with related disciplines in delivery of good conservation.
16. Sustainable development and the IHBC: The IHBC's work and its remit accord with the five principles of sustainable development as agreed by, and still in operation under, the UK and devolved governments and administrations. These are:
- a. Living within environmental limits
  - b. Ensuring a strong, healthy and just society
  - c. Achieving a sustainable economy
  - d. Promoting good governance
  - e. Using sound science responsibly.

## **CORPORATE PLAN 2020 - CP20: BACKGROUND AND CONTEXT**

17. Surveys of IHBC members in 2013 and 2014 have informed the development of CP20, and have confirmed or captured strong support for the IHBC's corporate strategy and progress to date, in particular CP10, our corporate plan for 2010-15, the predecessor to CP20. That endorsement runs alongside the wider sector consultations, initiatives and engagement with changes that have informed our forward plans and thinking, such as in:
- a. England, for example Heritage 2020, the sector wide forward plan that, in key parts, the IHBC has helped shape, as well as the evolution of a built environment link-grouping, 'Place Alliance'
  - b. Scotland, attached to the development of the new body Historic Environment Scotland and associated work by Built Environment Forum Scotland (BEFS), of which the IHBC is a member, and
  - c. Wales and Northern Ireland, as new legislation and structures are developed in the context of very different legacies of heritage management and planning.
- The overarching task for CP20, consequently, is to build on the success of the past in context of future ambitions and challenges. This demands integrating any new activities into what we are already doing, maintaining sustainable and cost-effective services and so 'do more, but lose nothing'.
18. The surveys and allied changes, implicitly and explicitly, highlighted the need for the new plan to build on our work to date, including to:
- a. Continue developing and evolving existing corporate operations

- b. Continue to expand, extend and diversify both membership and income
- c. Extend further the operations of our trading arm, IHBC Enterprises
- d. Maintain and refine the executive National Office as a viable and sustainable operation integrated with the IHBC's wider voluntary resources and infrastructure
- e. Respond to received perceptions about the sector, building on achievements that include:
  - i. Leading the cross-sector response to England's Heritage 'White Paper', linking bodies that represented some ¼ million memberships across the UK (2008)
  - ii. Operating a functioning model for applied conservation skills, using the IHBC's Conservation Cycle to map between international and national conservation standards and models and the IHBC's Areas of Competence and its allied services (for example IHBC membership and course recognition) and as well as to help shape new services (for example in terms of additional benefits for IHBC-recognised conservation services listed under our 'HESPR' scheme)
  - iii. Developing innovative member services that raise conservation profile and standards, such as the integrated news service and research resource represented by the IHBC's 'NewsBlog' and linked email alert service
  - iv. Collaborating in the establishment of core tools in modern specialist practice, such as:
    - 1. Establishing the National Occupational Standard (NOS) in conservation: A cross-sector NOS for practice, written alongside planning, control and related standards
    - 2. Developing the new British Standard for building conservation, B.S. 7913.

19. Consequently, **principal priorities** identified by the surveys may be summarised as being to:

- a. Maintain and refine current services to members and the sector, including through Branches and wider corporate operations
- b. Deliver more effective advocacy and credible high-level representation to the highest levels of political and government operations
- c. Enhance partnerships, and by extension, structures for collaborative working and strategic leadership, across the widest sector interests
- d. Articulate and extend research in the context of the IHBC's substantial knowledge base and networks, particularly for the benefit of members and their work, developing and investing in research, advice, policy and information, including to establish a more substantial, evidence-based practice standards and advocacy all underpinned by effective access to relevant information.

20. Those surveys also indicated the **strategic challenges** that the organisation and its members faced, notably to:

- a. Extend skills
- b. Promote good practice
- c. Enhance capacity
- d. Access information
- e. Facilitate education.

21. These **principle priorities** and **strategic challenges** above are listed across the columns in the CP20 matrix on page 4.

22. In light of the headline priorities and challenges listed in paragraphs 19 and 20 above, the **actions** for CP20, developed out of our existing plan, are summarised as being to:

- a. Maintain and enhance services, and so continue the main areas of CP10

- b. Integrate that priority with additional strategic areas of operation covering:
    - i. Structures: Though developments in governance and 'IHBC+' 'experimental evolution' strategy, to explore and promote a more diverse, inclusive and sustainable organisation that can effectively reflect and deliver on conservation in the built and historic environment
    - ii. Voluntary Capacity: Build on the potential of the LETS Liaison Officer role
    - iii. Standards: Consolidate Research capacity and credentials to underpin development of evidence-based standards
    - iv. Partnerships: Extend opportunities for collaboration across the full diversity of sector interests, through mechanisms such as formal memoranda as well as more informal arrangements and agreements
    - v. Services: Refine and generate practical, relevant, accessible and viable services, in particular taking advantage of our digital infrastructure and web-based resources
    - vi. Membership: Extend our support for those seeking IHBC accreditation.
23. New areas to target will evolve in line with operating environment and under the guidance of new governance structures attached to the development of IHBC+, and currently include:
- a. Taxation: both general VAT and 'UK Heritage Tax Credits' for designated fabric
  - b. Local authority service standards: including kite-marking and benchmarking
  - c. Support for volunteers with heritage and civic interests: building links between non-specialist heritage users and the specialist conservation knowledge, using especially our strong legacy of Branch-driven CPD and related training events
  - d. Mainstreaming principles of conservation practice: to extend our influence across construction, commercial and development interests in ways that underpin the specialist standards of conservation practice
  - e. Generating political support: underpinned by evidence-based research into conservation values and benefits
  - f. Climate change mitigation: extending awareness and understanding of the potential of conservation practice standards to mitigate climate change impacts.
24. The actions and target areas above are captured under corresponding headings in the outline Action Plan for CP20, appended below. The headline Aims of the Action Plan are included in the CP20 matrix on page 7. These are modifications of corresponding aims for CP10, reflecting both CP20's continuity with CP10 as well as its new focus.

## **FURTHER DEVELOPMENTS**

25. Following approval at the IHBC's 2015 AGM, a detailed programme of 'SMART' targets – including regular sector-wide surveys - will be developed against our aims and actions, with lead roles ascribed as appropriate to officers, committees, Branches and the National Office, ensuring appropriate monitoring and oversight of delivery by the IHBC's trustees, officers and, supported by our evolving governance, all other IHBC members.
26. The Action Plan will be monitored at each meeting of trustees as well as annually, and the Corporate Plan as a whole will be reviewed from 2017.
27. As a complex organisation charged with supporting conservation in a rapidly-changing environment, the shaping, agreeing and implementation of CP20 as a flexible and responsive tool to guide decisions should ensure that the IHBC will play the most substantial role possible given its limited resources and the rapidly changing operating environment currently envisaged both for the institute and our members.

*The Institute of Historic Building Conservation  
19 June 2015*

**CP20: Matrix correlating 2013 and 2014 membership survey issues and CP20**

| <p>→ <i>Issues</i><br/>(Based 2013 and 2014 surveys)</p> <p>↓ CP20 Aims<br/>(Action Plan)</p>   | <i>Priorities</i>              |                           |                             |                        | <i>Challenges</i> |                      |                 |                           |                  |
|---|--------------------------------|---------------------------|-----------------------------|------------------------|-------------------|----------------------|-----------------|---------------------------|------------------|
|   | <i>Refine current services</i> | <i>Effective advocacy</i> | <i>Enhance partnerships</i> | <i>Extend research</i> | <i>Skills</i>     | <i>Good practice</i> | <i>Capacity</i> | <i>Information access</i> | <i>Education</i> |
| <b>Object A: Helping People</b>   |                                |                           |                             |                        |                   |                      |                 |                           |                  |
| A.1: Extend resource and network potential of web services  | +                              | +                         | +                           |                        | +                 |                      | +               | +                         | +                |
| A.2: Empower IHBC members as volunteers   | +                              | +                         | +                           | +                      |                   | +                    | +               | +                         | +                |
| A.3 Influence and empower non-specialist and lay interests  | +                              | +                         | +                           | +                      | +                 | +                    | +               |                           | +                |
| <b>Object B: Helping Conservation</b>   |                                |                           |                             |                        |                   |                      |                 |                           |                  |
| B.1: Extend recognition of and support for IHBC conservation standards and services   |                                | +                         |                             | +                      |                   | +                    | +               |                           | +                |
| B.2: Lead and support heritage sector learning, education training and standards  | +                              | +                         |                             |                        | +                 | +                    |                 | +                         | +                |
| B.3: Consolidate research base for expert, evidence-based advocacy  |                                | +                         |                             | +                      | +                 | +                    |                 | +                         | +                |
| <b>Object C: Helping Conservation Specialists</b>   |                                |                           |                             |                        |                   |                      |                 |                           |                  |
| C.1: Underpin members' skills using regulation, accreditation, certification and advice <i>etc.</i> across public and private sectors | +                              | +                         |                             | +                      | +                 | +                    |                 |                           | +                |
| C.2: Extend member-specific services and benefits   | +                              | +                         | +                           | +                      | +                 | +                    | +               | +                         | +                |
| C.3: Refine governance and management   | +                              | +                         | +                           |                        |                   |                      | +               |                           | +                |

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

| <b>Object A: Helping people:</b> |   |   |
|----------------------------------|---|---|
| Aims                             | Actions   |   |
| <p>A.1</p>                       | <p><b><u>Extend resource and network potential of web services:</u></b><br/>Maintain and enhance the Web site to underpin access to IHBC resources and capacity</p> <p><b><u>2020 Key Aims</u></b></p> <ul style="list-style-type: none"> <li>• Extend IHBC's 'local and global' reach and impacts</li> <li>• Increase impact by improving services and benefits</li> </ul> | <p><b><u>Core delivery strategy: Extend web and digital services and networks</u></b><br/>Develop web-based resources, capacity and networks that combine local relevance with global application while remaining accessible and financially sustainable.</p> <p><b><u>Ongoing</u></b></p> <ul style="list-style-type: none"> <li>• Maintain and update web content and resources (for example the 'IHBC Jobs <i>etc.</i>' resource)</li> <li>• Maintain and update NewsBlogs and e-mail alert service</li> <li>• Refine public access to web-based resources including advice, policy, enquiries and related areas</li> <li>• Articulate global conservation relevance and interests</li> </ul> <p><b><u>CP20 specific</u></b></p> <ul style="list-style-type: none"> <li>• Promote 'IHBC Jobs <i>etc.</i>' site as resource for recruitment, including trustees <i>etc.</i></li> <li>• Refine access to digital resources and linked new benefits to enhance value and impact of IHBC</li> <li>• Extend and refine reach of and access to social and digital resources and tools</li> <li>• Deliver the 'Caring for your home' online resource as accessible tool for public use</li> </ul>   |
| <p>A.2</p>                       | <p><b><u>Empower IHBC members as volunteers:</u></b> Maintain and develop support for volunteers to maximise voluntary capacity</p> <p><b><u>2020 Key Aims</u></b></p> <ul style="list-style-type: none"> <li>• Maintain and enhance member services</li> <li>• Integrate corporate and volunteer management and support so as to improve capacity and outcomes</li> </ul>  | <p><b><u>Core delivery strategy: Integrate 'IHBC+' and 'LETS' Liaison Officer initiatives</u></b><br/>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><b><u>Ongoing</u></b></p> <ul style="list-style-type: none"> <li>• Embed 'LETS' Liaison Officer capacity-building across mainstream IHBC operations</li> <li>• Maintain and develop member and sector surveys to monitor progress</li> <li>• Hold annual Branch Connection Days</li> <li>• Extend research infrastructure (including Research notes) to encourage volunteers to shape, inform and as appropriate produce research and guidance documents</li> <li>• Explore potential for CapacityBuild as an economically viable voluntary sector resource to enhance public access to IHBC's networks</li> <li>• Re-visit potential of Honorary Associates</li> <li>• Maintain on-line advocacy resources to help volunteers engage with political issues</li> </ul> <p><b><u>CP20 specific</u></b></p> <ul style="list-style-type: none"> <li>• Recast support infrastructure (promotion, policy and management) of voluntary activities</li> <li>• Review and re-evaluate structures to maximise potential for membership involvement and</li> </ul> |

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

|     |   |  |  |  |
|-----|---|--|--|--|
|     | <ul style="list-style-type: none"> <li>Maintain focus on service standards using regular survey feedback</li> </ul>   | <p>contributions</p> <ul style="list-style-type: none"> <li>Maintain support for development of web resources for Branches</li> <li>Establish infrastructure for managing member-linked networks (organisational representation etc.)</li> </ul>   |  |  |
| A.3 | <p><b>Influence and empower non-specialist and lay interests:</b> Promote wider public (lay), and non-conservation specialist awareness of the benefits of conservation</p> <p><b>2020 Key Aims</b></p> <ul style="list-style-type: none"> <li>Integrate potential and benefits of lay and non-conservation specialist interests (political and civic; client, user and partner bodies) into operations and services</li> <li>Extend and adapt training resources to facilitate non-conservation specialist and lay use</li> <li>Apply lessons in lay skills support from 'Oxford Project'</li> </ul> | <p><b><u>Delivery strategy: Extend access to benefits and services</u></b><br/>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><b><u>Ongoing</u></b></p> <ul style="list-style-type: none"> <li>Maintain and extend 'TeamStarter' programme (incorporating opportunities for Associates)</li> <li>Re-cast 'WebStarter' programme themes specifically for civic, citizen and other lay interests</li> <li>Host and co-host parliamentary and related events highlighting sustainable values in conservation</li> <li>Refine consultations panel operations in line with CP20</li> <li>Extend representation within and across the IHBC</li> <li>Maintain and extend open 'social networking' in line with CP20</li> </ul> <p><b><u>CP20 specific</u></b></p> <ul style="list-style-type: none"> <li>Recast 'peripatetic' Council strategy for Committee implementation</li> <li>Recast infrastructure of partnership and influence, including tools for collaboration such as Memoranda of Understanding (MOUs) and representation on partner organisations and networks</li> <li>Review implementation of 'Honorary Associates' initiative</li> <li>Establish framework for 'non-specialist' practitioners and lay interest access to IHBC services</li> <li>Formalise links with select 'Green' and related environment bodies</li> <li>Progress 'Oxford project' on skilled volunteers (<a href="http://ihbconline.co.uk/newsarchive/?p=8852">http://ihbconline.co.uk/newsarchive/?p=8852</a>)</li> <li>Contribute to the 'Mainstream' strategy in Scotland's Historic Environment Strategy</li> <li>Articulate conservation priorities in NHPP/Heritage 2020 programme (England)</li> <li>Promote Wales Historic Environment Network or equivalent</li> <li>Explore link body equivalences to BEFS etc. for Northern Ireland and beyond</li> <li>Enhance links to Farrell-linked 'PLACE' initiative</li> <li>Implement 'Caring for your home' resource, building on relevant links and services</li> </ul> |  |  |

| <b>Object B: Helping conservation</b>  |  |
|--|--|
| Aim  | Action   |
| <p>B.1 <b>Extend recognition of and support for IHBC conservation standards and services:</b> Expand awareness and recognition of specialist interdisciplinary conservation standards</p> <p><b>2020 Key Aims</b></p> <ul style="list-style-type: none"> <li>• Raise profile of IHBC member and sector activities, services and benefits</li> <li>• Raise awareness of IHBC Associate member criteria as step towards multidisciplinary conservation accreditation as Full Member</li> </ul> | <p><b><u>Delivery Strategy: Use 'IHBC+' to generate lessons in developing sector awareness, understanding, collaboration and integration</u></b><br/>                     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><b><u>Ongoing</u></b></p> <ul style="list-style-type: none"> <li>• Maintain and promote accredited member listing</li> <li>• Maintain and promote HESPR scheme</li> <li>• Establish HESPR as the key resource for clients seeking relevant conservation specialists, including through the 'caring for your home' online resource'</li> </ul> <p><b><u>CP20 specific</u></b></p> <ul style="list-style-type: none"> <li>• Raise awareness and understanding across networks and partner bodies of the character and value of IHBC membership criteria, and related standards, roles and activities</li> <li>• Secure formal recognition by partner bodies of IHBC's membership criteria and standards (including National Occupational Standards and British Standard 7913)</li> <li>• Encourage multidisciplinary skills and accreditation across IHBC membership and networks</li> <li>• Highlight value of tax relief for relevant professional and specialist memberships</li> <li>• Explore chartering in built and historic environment conservation as a benefit to the IHBC and our members</li> </ul> |
| <p>B.2 <b>Lead and support heritage sector learning, education training and standards:</b> Maintain and enhance heritage sector awareness of IHBC's conservation education and training resources and capacity</p> <p><b>2020 Key Aims</b></p> <ul style="list-style-type: none"> <li>• Extend awareness of IHBC's conservation</li> </ul>   | <p><b><u>Delivery strategy: Integrate LETS Liaison Officer role with practitioner support services</u></b><br/>                     Maintain, enhance and extend current services, guidance, benefits, support and opportunities, including proportionate public accessibility as informed by sector and member feedback.</p> <p><b><u>Ongoing</u></b></p> <ul style="list-style-type: none"> <li>• Maintain publications: Context; Yearbook; Research Notes; Guidance Notes <i>etc</i></li> <li>• Annual Schools and associated actions, for example School partners and sponsors</li> <li>• Maintain School 'Fringe' events or equivalent (including Council+)</li> <li>• Maintain and enhance Gus Astley Annual Student Award (GASA)</li> <li>• Maintain access to jobs opportunities and employment data</li> <li>• TeamStarter (including recasting WebStarter for new audiences)</li> <li>• Maintain Conservation Course Connection Days, and support and services for recognition</li> <li>• Integrate interdisciplinary National Occupational Standards <i>etc.</i> with mainstream</li> </ul>   |

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|     |   |   |  |
|-----|---|---|--|
|     | <p>activities, resources and standards</p> <ul style="list-style-type: none"> <li>• Extend infrastructure for collaboration including through memoranda of understanding</li> </ul>   | <p>development, management and heritage-related practice</p> <ul style="list-style-type: none"> <li>• Enhance web guidance</li> <li>• Enhance guidance to prospective members</li> <li>• Establish protocols to secure HESPR as an indicator in assessing sector needs and priorities.</li> </ul> <p><b>CP20 specific</b></p> <ul style="list-style-type: none"> <li>• Agree a 'training priorities framework' across committee, Branch and other infrastructure</li> <li>• Develop sector strategy to identify training needs and priorities</li> <li>• Promote practice standards etc. by creating an accessible online resource for practitioners</li> <li>• Refine services, informed by member and sector feedback</li> <li>• Explore targeted support for Conservation Officer Groups (COGs)</li> <li>• Recast online publications and related resources in line with CP20 principles</li> <li>• Extend corporate links and partnerships to enhance membership standards and benefits</li> </ul>  |  |
| B.3 | <p><b>Consolidate research base for expert, evidence-based advocacy:</b> 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><b>2020 Key Aims</b></p> <ul style="list-style-type: none"> <li>• Consolidate expert conservation-specific research credentials in both public and private sector</li> <li>• Develop 'research and influencing' role through collective events, notably tax reliefs</li> </ul> | <p><b>Delivery strategy: 'Advocacy: Demonstrate Value – Generate capacity'</b><br/>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><b>Ongoing</b></p> <ul style="list-style-type: none"> <li>• Maintain and enhance Research note and Guidance notes strategy</li> <li>• Develop and extend Local Authority capacity and practice research, including benchmarks <i>etc.</i></li> <li>• Maintain the HESPR annual survey and the database it generates</li> <li>• Develop and maintain database of tenders for the HESPRR</li> <li>• Develop and maintain IHBC's jobs resource and database</li> <li>• Maintain a regular programme of 'horizon-scanning' strategy, of surveys and engagement, including with HESPR members.</li> <li>• Survey sector to establish sector awareness and effectiveness of IHBC</li> </ul> <p><b>CP20 specific</b></p> <ul style="list-style-type: none"> <li>• Specify, in partnership as appropriate, values of having dedicated and proportionate conservation skills within all operations that impact on the historic environment</li> <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> <li>• Explore funding for IHBC Education post or related</li> <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>Object C: Helping conservation specialists</b>   |   |
|---|---|
| Aim   | Action  |
| <p>C.1 <b>Underpin members' skills using regulation, accreditation, certification and advice etc. across public and private sectors</b></p> <p><b><u>2020 Key Aims:</u></b></p> <ul style="list-style-type: none"> <li>• Enhance support for conservation accreditation processes</li> <li>• Develop, monitor and regulate professional standards <i>etc.</i></li> <li>• Extend HESPR as a private sector resource</li> <li>• Support employment and career progress tied to IHBC membership</li> </ul> | <p><b><u>Delivery strategy: Manage membership standards</u></b><br/>Maintain and enhance practice standards in conjunction with disciplinary processes.</p> <p><b><u>Ongoing</u></b></p> <ul style="list-style-type: none"> <li>• Maintain and enhance membership applications processes and standards, including Full, Associate and Affiliate</li> <li>• Maintain and enhance infrastructure for disciplinary procedures including guidance and standards</li> <li>• Maintain and enhance CPD review processes</li> <li>• Maintain and promote HESPR membership and benefits</li> <li>• Enhance annual HESPR member surveys to evaluate satisfaction and state of sector</li> <li>• Adopt standards from relevant bodies as required</li> </ul> <p><b><u>CP20 specific</u></b></p> <ul style="list-style-type: none"> <li>• Recognising the emphatic multidisciplinary nature of the IHBC membership, explore partnership opportunities with professional bodies to facilitate management of members</li> <li>• Embed Associate membership category effectively within and across all operations</li> <li>• Explore opportunities for developing HESPR membership and benefits</li> <li>• Establish protocols to secure HESPR as resource for and indicator of practice standards</li> <li>• 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</li> </ul> |
| <p>C.2 <b>Extend member-specific services and benefits</b></p> <p><b><u>2020 Key Aims</u></b></p> <ul style="list-style-type: none"> <li>• Enhance membership profile, benefits and services informed by member satisfaction</li> <li>• Integrate membership benefits and services with learning objectives</li> <li>• Embed HESPR in the</li> </ul>  | <p><b><u>Delivery strategy: Help members shape services - 'IHBC+' and 'LETS' Liaison Officer</u></b><br/>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><b><u>Ongoing</u></b></p> <ul style="list-style-type: none"> <li>• Maintain and refine bursary provision and hardship support</li> <li>• Maintain annual (at least) member surveys</li> <li>• Embed LETS role in IHBC operations</li> <li>• Maintain, and enhance as resources allow, services of and support from the National Office.</li> <li>• Maintain and enhance Membership e-letter</li> <li>• Maintain and enhance Committee and Branch support</li> </ul>  |

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

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|     | <p>mainstream of client resources for those seeking skills for work on traditional and historic fabric and areas using National Occupational Standards etc.</p>  | <ul style="list-style-type: none"> <li>• Maintain and develop Professional Indemnity resource</li> <li>• Enhancing additional member benefits (for example legal and human resource advice etc.)</li> <li>• Monitor relative benefits of different subscription models</li> <li>• Refine press/news/information management strategy</li> </ul> <p><b>CP20 specific</b></p> <ul style="list-style-type: none"> <li>• Enhance guidance for Associate membership category</li> <li>• Develop structured membership benefits/links to relevant professional bodies etc.</li> <li>• Develop a sustainable new core benefit/service (such as NewsBlogs or tender advertisements)</li> </ul>   |  |
| C.3 | <p><b>Refine governance and management:</b> Refine corporate infrastructure 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><b>2020 Key Aims</b></p> <ul style="list-style-type: none"> <li>• Develop CP20 so as to extend sustainable charitable and commercial funding and income streams</li> <li>• Embed lessons from IHBC+</li> <li>• Enhance sustainable access to IHBC's charitable operations, activities and capacity by extending IHBC Enterprises' commercial and trading operations</li> </ul> | <p><b>Delivery strategy: Implement CP20 within sustainable charity and business models</b><br/>Maintain existing (2015) services, operations and compliance standards, while also embedding lessons from 'IHBC+' across governance structures and corporate operations, including charity, funding, trading and related activities.</p> <p><b>Ongoing</b></p> <ul style="list-style-type: none"> <li>• Refine and extend opportunities for donations and Gift Aid</li> <li>• Articulate business strategies for sustainable growth across IHBC</li> <li>• 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.)</li> <li>• Observe statutory and ethical standards and requirements, under oversight of Council, in line with current legislation and practice</li> <li>• Maintain and develop risk management procedures and systems</li> <li>• Enhance business management capacity in national office</li> <li>• Explore opportunities for efficiencies in and development support for National Office</li> <li>• Prepare strategic plan for future development</li> </ul> <p><b>CP20 specific</b></p> <ul style="list-style-type: none"> <li>• Establish charity infrastructure centred on fundraising committee and secure funding</li> <li>• Implement lessons from IHBC+</li> <li>• Develop IHBC Enterprises strategic business planning to serve IHBC</li> <li>• Promote IHBC Enterprises' conservation-related services through HESPR</li> <li>• Explore new 'conference call' communication opportunities</li> <li>• Review 'Corporate Plan 2015-20', CP20', using sector surveys to measure success</li> <li>• Implement strategy and processes for more inclusive, participative and pro-active structures across committee, Branches and any wider operations</li> </ul> |  |