IHBC SOUTH BRANCH BUSINESS PLAN 2026/29

1. Introduction

1.1 IHBC South Branch represents approximately 150 members across all membership categories, forming a diverse network of conservation professionals committed to protecting and enhancing the historic environment.

1.2 The Branch covers a broad geographical area across the south of England, from Buckinghamshire in the north to the Channel Islands in the south, encompassing a mix of urban centres, historic towns, rural landscapes, island communities and coastal environments. This varied context presents a wide spectrum of conservation challenges and opportunities — from managing change in pressured growth areas to sustaining the character of sensitive historic places — and provides a rich foundation for shared learning and professional development.

1.3 As a regional forum, the Branch supports the exchange of knowledge, skills and experience, encouraging cooperation between members working in local authorities, private practice, heritage organisations, academia, and related disciplines.

1.4 This Business Plan provides a forward programme outlining what the Branch intends to deliver, how it will be achieved, who will lead activities, and the resources required, reflecting IHBC guidance on branch planning. The plan complements the Institute's wider corporate objectives, recognising that branch plans should help take forward national aims while delivering member services locally.

2. Purpose, Goals and Strategic Alignment

2.1 The IHBC Corporate Plan continues to frame activity around three primary themes — helping people, helping conservation, and helping places — supporting members while influencing conservation practice for public benefit.

2.2 The Plan aligns with the Institute's purpose of promoting conservation and education relating to buildings and places of architectural or historic value for public benefit, while setting standards for practice, improving training, and establishing a realistic strategy, delivery programme, and financial approach for the IHBC South Branch for the period 2026–2029 (see Appendix A).

2.3 The Plan sets out a clear framework for delivery, ensuring that the Branch continues to support members effectively while contributing to the Institute of Historic Building Conservation's wider objectives.

2.4 Our mission is to be an active, inclusive and professionally valuable branch delivering consistent, high-quality CPD while strengthening networks that support the conservation and sustainable management of the historic environment.

2.5 Recognising the geographic diversity of our members, the Branch is dedicated to providing a consistent, informative, and educational Continuing Professional Development (CPD) program that also offers networking and professional support opportunities. We emphasise strong governance, effective member engagement, and collaborative partnership working across the region.

2.6 Our activities will employ a positive, inclusive and collaborative approach, including at least two in-person CPD events annually, with site-based learning where feasible. we need to add Hybrid / virtual in here to be inclusive.

3. South Branch Priorities for 2026/27

3.1 The Branch priorities for this year can be summarised as:

- Professional standards and skills development
- Education and knowledge transfer
- Advocacy and visibility of conservation
- Collaborative working across the heritage sector
- Well-being and support of members

3.2 High-quality Continuing Professional Development (CPD) is essential to fulfilling the Branch's mission and meeting the Institute's high standards for all members. Branch-led CPD offers an invaluable opportunity to engage with current issues, critically reflect on practice, and learn from peers, directly supporting the Institute's CPD requirements. We are dedicated to upholding exemplary professional standards within our branch and, whenever relevant, to promoting the latest policies, guidance, and technical practices through the effective use of the IHBC Toolbox.

3.3 The South Branch is committed to delivering a **broad and varied CPD programme** that reflects the diversity of conservation practice and addresses both core competencies and emerging challenges. Programmes will cover a range of subject matter, including, but not limited to:

- **Technical conservation practice** — building pathology, materials analysis, repair methods, retrofit and sustainability in heritage contexts.
- **Policy and guidance updates** — planning policy, revisions to national or statutory guidance, heritage legislation and implications for local practice.
- **Case studies and lessons learned** — project reviews that explore successes and challenges from current and recent work across the region.
- **Professional skills and standards** — ethics, professional conduct, project management, community engagement, and equality, diversity and inclusion in practice.

3.4 The Branch will host at least two in-person CPD events annually, such as site visits, workshops, or seminars, to promote peer interaction and practical learning. These may also be Hybrid events, with virtual delegate attendance, or will be supplemented by at least one online session to ensure accessibility for members with travel or time constraints, given the wide geographic area. Additionally, the Branch will periodically offer updates, recaps, and briefing sessions on key topics or guidance changes, including online follow-ups, recorded presentations, or discussions on priorities identified by members.

3.5 Recognising geographical challenges and to promote inclusivity, we are exploring accessibility tools such as alternative platforms and social media and will seek member feedback to enhance participation. These tools will expand our outreach and enable us to plan joint events with the other branches to facilitate networking. These events will be offered at cost-effective prices to maximise participation.

3.6 By providing a diverse, accessible CPD program, the Branch aims to foster ongoing professional growth, reinforce best practices, and address members' varied interests and responsibilities, responding to the IHBC Competences and CPD requirements. We also encourage and develop other events, in association with the Branch Partnership programmes.

3.7 To strengthen our outreach, we must actively recruit more members to the committee or supporting roles, particularly younger individuals, through co-option for specific tasks. We also encourage collaboration between the Branches and other organisations to foster professional relationships and upskill our members. This approach will ensure fresh perspectives and sustained engagement. The successful trial of a hybrid format for the 2025 AGM demonstrates our ability to adapt and innovate. Building on this success, we propose adopting a flexible, rotating venue model for meetings—combining online and in-person gatherings across the four counties and islands in our region—to enhance accessibility and participation.

3.8 Our members in Heritage departments report facing ongoing resource limitations and heavy workloads, worsened by poor recruitment. This situation leads to isolation, overwhelm, and declining well-being. Insufficient resources severely hinder effective training and membership of the IHBC. In our second objective, we are prioritising support for staff across all sectors, improving wellbeing, and advocating to address these pressing challenges effectively. Including subsidised CPD courses for Conservation Officers who are not members.

3.9 We plan to ensure that any new members are supported through our member support system, where appropriate.

4. Governance

4.1 Our Branch Governance framework underpins the efficient operation of the Branch, ensuring all activities are meticulously managed and strategically aligned with IHBC standards. The Branch Committee convenes multiple times annually—at least quarterly—to meticulously plan events, address contemporary conservation issues, disseminate updates from the National Council, develop draft Business Plans, and oversee various branch affairs. Additionally, we commit to organising at least one in-person committee meeting each year to strengthen camaraderie and foster a collaborative environment.

4.2 We have developed clear lines of responsibility — particularly in finance and membership — support accountability while allowing roles to be shared or adapted to reflect local circumstances. We set up specific task groups to ensure roles and events are well managed and delivered. In addition, we are engaging, liaising with and supported by the Branch Consultant.

5. Branch Commitments

5.1 This year we plan to:

- Hold an Annual General Meeting (AGM) between late February and March
- Have at least one Committee meeting every quarter (more if required)
- Maintain full financial records to meet audit requirements
- Submit financial returns following the IHBC financial year ending 31 March.
- Review the Plan annually as part of a rolling three-year strategy.

6. Monitoring and Review

6.1 Monitoring supports the effective delivery of the South Branch Business Plan by ensuring that planned activities and operations remain aligned with agreed priorities and available resources. The annual Branch Business Plan outlines a Branch's operations and serves as the focus for oversight by national committees and trustees, helping maintain IHBC standards across events and services.

6.2 Progress will be regularly reviewed by the Branch Committee to ensure that actions remain realistic, achievable, and responsive to member needs. Progress will be evaluated annually against:

- Delivery of planned CPD
- Attendance and engagement
- Member feedback
- Financial performance
- Committee capacity

6.3 Annual review at the AGM will ensure goals remain realistic and achievable — a core expectation of branch planning.

7. Budget and Indicative Account

7.1 The Branch's bank balance has remained stable over recent years, having sufficient funds to implement our aspirations. We aim to improve the provision of CPD events and have the flexibility to charge where necessary to cover costs, ensuring we operate within our means.

7.2 Our budget estimate for year 2026/27, alongside the actual outturn of year 2025/26 and the forecast for year 2027/28, is included in Appendix B. Most of our funding will come from central allocation, event income, and, where appropriate, partnership contributions. Our events are open to non-members on a proportional basis, and these places are used to subsidise members/students and conservation officer places.

7.3 The branch expenses include in-person committee meetings, bank charges, administrative costs, and occasional unexpected branch-related work for branch officers. We will also, where appropriate, supplement our branch budget by taking advantage of the Branch Partnership Scheme.

8. Conclusion

8.1 This Business Plan provides a clear, deliverable framework for the South Branch over the 2026–2029 period, aligning regional activity with IHBC corporate objectives and responding to the needs of approximately 150 members across the Branch area. By focusing on education, collaboration, and governance, the Branch will contribute meaningfully to the Institute's mission to promote conservation for public benefit.

8.2 Through the consistent delivery of high-quality CPD, active collaboration with sector partners, and sound governance arrangements, the Branch will support professional excellence and contribute to the promotion and protection of the historic environment for public benefit. Regular review and careful stewardship of resources will ensure that the programme remains proportionate, realistic and sustainable, enabling the Branch to maintain momentum, strengthen engagement, and provide tangible value to members throughout the planning period.

David Lomas –South Branch Chair

APPENDIX A: Strategic Objectives (2026–2029)

Objective 1 — Support Professional Excellence, Skills

IHBC exists to establish the highest standards of conservation practice and support effective protection of the historic environment.

Branch Priorities

- Deliver a structured CPD programme accessible across the region.
- Provide at least two in-person CPD events annually, including site-based learning where feasible.
- Promote external training opportunities to supplement member learning.
- Support and actively participate in the Work Heritage Skills forum

Strategic Outcome**:**
A skilled membership equipped to address emerging conservation challenges.

Objective 2 — Help People Through Member Support and Engagement

The Institute promotes conservation as a resource for people now and in the future.

Branch Priorities

- Encourage participation across all membership grades.
- Support Affiliates progressing toward full membership.
- Provide networking opportunities alongside technical learning.
- Support members by encouraging better working practises and improving well-being through forums and networking
- Creating inclusive working environments for hybrid events

Strategic Outcome:
Higher engagement, improved retention, and a resilient volunteer base.

Objective 3 — Help Conservation Through Collaboration and Advocacy

IHBC emphasises partnerships and cross-sector engagement to strengthen heritage skills and advocacy.

Branch Priorities

- Develop joint events with neighbouring branches and professional bodies.
- Build relationships with local authorities, universities, and heritage organisations.
- Promote good conservation practice through events and communications.

Strategic Outcome:
Greater regional influence and interdisciplinary learning.

Objective 4 — Ensure Effective Governance and Financial Stewardship

Council must be assured that branch funding supports charitable aims and is strategically directed.

Branch Priorities

- Align budgets with planned activities.
- Monitor expenditure through the Treasurer.
- Seek supplementary income where appropriate.

Strategic Outcome:
Transparent governance and sustainable operations.

Delivery Framework

Quarter	Core Activity
Q1/2	AGM (hybrid or virtual) with CPD lecture or panel (hybrid where appropriate)
Q3/4	In-person CPD day
Potential	Online seminar or collaborative event
Potential	In-person Networking

Additional events may be arranged, subject to capacity and demand

APPENDIX B: Budget & Forecast

	Actual 2025/26 £	**Budget 2026/27 £**	*Forecast 2027/28 £*
Opening Balance	3,505.10	**4,094.68**	*4,953.18*
Income			
Events	1,753.00	**1,800.00**	*1,800.00*
National Fund	0.00	**750.00**	*750.00*
Total Income	1,753.00	**2,550.00**	*2,550.00*
Expenditure			
CPD and events	1,137.42	**1,371.50**	*1,500.00*
Subsistence expenses*		**270.00**	*210.00*
Annual School Bursary **			*500.00*
Other expenses***	26.00	**50.00**	*52.50*
Total Expenditure	1163.42	**1,691.50**	*2262.50*
Operating Profit	335.28	**858.50**	*287.50*
Closing Balance	4,094.68	**4,953.18**	*£5,240.68*

Notes:
Reserve held by HQ as proceeds from Summer School £1,831.69 as of 30 March 2026
*Committee and officer related expenses (eg in person committee attendance expenses)
** new item proposed for 2027/28
*** Provision of bank charges, office admin etc
NB Liabilities for 2025/26 -expenditure for course in March 2026 Banked after 30 March 2026 included in 206/27.