



MID-TERM EQUALITIES REPORT 2023



HISTORIC
ENVIRONMENT
SCOTLAND

ÀRAINNEACHD
EACHDRAIDHEIL
ALBA

- Annex A** Equality Outcomes mid-term progress report 2021-22
- Annex B** Workforce Equality Monitoring
- Annex C** List of the Equality Champions Group



FOREWORD

I am pleased to introduce this mid-term progress report on our Equality Outcomes which were approved in April 2021. This will report on a number of projects, initiatives, and activities that demonstrate our commitment to improving equality in HES and highlight the difference we are making in delivering our equality outcomes. As part of this report, I would like to give you a flavour of some of the projects' partnerships listed below from the past two years:

- Young Scot and the HistoricScot forum have been working together to explore how to involve young people in the heritage sector, and how to make it more accessible. We have worked with Young Scot to increase engagement with young people, and we were successful in selling 7948 x £1 Visit tickets in 2022.
 - As part of the recovery from the COVID-19 Pandemic, our BSL tour resumed at Edinburgh and Stirling Castle in April 2022. Additionally, we organised Castle of Light: A Kingdom of Colours event access night, which included autism friendly, BSL and audio-scribed tours.
 - In our recently refreshed Research Strategy, tackling inequality and promoting diversity and inclusion are core considerations across our research activity and are in line with our Equality Outcomes.
 - PiCs (Properties in the Care) and the British Empire Research Project aim to investigate and understand the imperial connections of the PICs, by situating their historical owners within the activities of the British Empire, including the transatlantic slave economy and other colonial activities.
- Unforgettable Exhibition explores the lives of 12 individuals outwith mainstream history - The untold stories of people who shaped Scotland.
 - Unlock and Revive project comprises a series of digital sessions delivered to support this Edinburgh University Museums-led project using a 'prescribed culture' approach to support both students and local organisations with wellbeing and mental health programmes. Our contribution helped bring Trinity House collections to new audiences such as delivering reminiscence sessions for Alzheimer's Scotland.

This progress report sets out our three equality outcomes and highlights activity designed to support us in achieving our ambition to make the historic environment equitable, diverse, and inclusive.

Fiona McLean

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ex- Chair of People Committee
(HES Board)

INTRODUCTION

We, Historic Environment Scotland, are committed to make the historic environment a place where everyone feels included. Under the Equality Act 2010, we are required by the Public Sector Equality Duty (PSED) to have due regard to the need to:

- Eliminate unlawful discrimination, harassment and victimisation, and other prohibited conduct
- Advance equality of opportunity between people who share a relevant protected characteristic and those who do not
- Foster good relations between people who share a protected characteristic and those who do.

In Scotland, the PSED is underpinned by specific duties. This report will highlight our work from April 2021 and demonstrates how we are meeting the Scottish specific duties.

ABOUT US

Historic Environment Scotland (HES) is the lead public body for historic environment in Scotland. We are a Non-Departmental Public Body (NDPB) and a registered Scottish Charity (SC045925):

- We investigate, care for, and promote Scotland's historic environment.
- We care for more than 300 sites of national importance across the country and are the largest operator of paid visitor attractions in Scotland.
- We look after internationally significant archives and artefacts, containing over 1 million items relating to more than 350,000 historic sites.
- We are at the forefront of investigating and researching the historic environment and addressing the impacts of climate change on its future.

- We protect our historic places through designations and consents, promote their sustainable development and provide millions of pounds each year to local communities to repair and revitalise their historic environment.
- We provide advice and guidance about the historic environment and offer a wide range of training and learning opportunities.

We are responsible for leading and enabling the delivery of Scotland's historic environment strategy, *'Our Place in Time'*, which sets out a high-level strategic framework for the historic environment and is currently undergoing a refresh. It sets out a vision of how our historic environment can be understood, valued, cared for, and enjoyed. The key outcome of the strategy is to ensure that the cultural, social, environmental, and economic value of Scotland's heritage makes a strong contribution to the wellbeing of the nation and its people.

Our Corporate Plan, *'Heritage for All'*, sets out our vision that: *'Scotland's historic environment is cherished, understood, shared and enjoyed with pride, by everyone.'* It demonstrates our vision that the historic environment can bring people together and strengthen the bonds between all cultures and communities. It acknowledges that the historic environment is not just about the past. It is a vital part of all our lives, right now.



Our 2022/23 Annual Operating Plan (AOP) included an equality indicator, implemented our Equality Outcomes Action Plan 2021-22, which incorporates ambitions on our society, our services, and our people.

In April 2021 we published *2021-25 Equalities Outcomes and Annual Action Plan*¹ for the period from 2021 to 2025.

We set out three outcomes:

Our Society: We make a real difference to people's lives.

Our Services: We deliver responsive services to meet the needs and expectations of diverse groups.

Our People: We attract, recruit, and develop a diverse Board, workforce, and volunteer base.

Equality, diversity, and inclusion are at the heart of our work and is central to our aspiration of being a model public service provider and employer. This report highlights the progress that we have made over the last two years (2021-22) in achieving our equalities outcomes, provides pay and equalities monitoring data and a forward look to planned activity for the next two years to 2025.

DELIVERY

The activity required to deliver our three Equalities Outcomes is identified and monitored in our Equality Action Plan. The Equality Action Plan is updated annually and maintained by the HES Equalities Manager, supported by the Equality Champions Group. The latter meets quarterly and comprises senior representatives from across HES Directorates and functions. Members provide regular updates against the actions in the Equality Action Plan ascribed to their business areas and identify new projects and activity.

Our work to embed equality, diversity, and inclusion in HES is supported by several colleague forums and networks. There are currently six employee equality forums and networks in HES that exist to support our efforts to embed equality, diversity, and inclusion in all aspects of our work, namely: LGBT Network, Equity Forum, Youth Forum, Thinking Differently (the Neurodiversity Forum), the Global Diversity, and the Wellbeing Forum. They provide platforms for colleagues from across HES to come together, share ideas, raise awareness of challenges, and provide support to colleagues. They help our colleagues feel included at work and provide a safe space for honest conversations on work-life experience. They are crucial to improving a culture of inclusivity.

GOVERNANCE AND REPORTING

HES's People Committee, which is a sub-committee of the HES Board, has delegated responsibility for overseeing our approach to equalities and monitoring progress in meeting our equalities duties, providing assurance to the HES Board. It meets on a quarterly basis. It is chaired by a Board member and attended by one other, as well as the Chief Executive and the Director of People.

The Director of External Relations and Partnerships is responsible for overseeing the production of our mainstreaming report and monitoring delivery. However, the Executive Leadership Team recognises that it shares responsibility in respect of promoting and embedding equality in our operations and meeting our equalities duties.

Our Corporate Plan includes a Key Performance Indicator (KPI) relating to equalities, and this commitment to promoting equalities. Our Executive Leadership Team reviews performance against our KPIs and the Chief Executive regularly reports on corporate performance to the HES Board.



¹ <https://readymag.com/hes/hes-equality-report-2021/part2/>

EQUALITY OUTCOMES PROGRESS REPORT 2021 – 2022

This section presents examples of projects and activity over the period 2021-22 that demonstrate our progress in achieving our Equality Outcomes. There are a range of activities delivered across all functions to support in achieving all three equalities outcomes.

OUTCOME 1 – Our Society: We make a real difference to people’s lives.

Creating community connection and co-designing with communities through meaningful engagement has been a focus for us over the past two years. We have maintained an intersectional approach and successfully established relationships with external community-led groups and organisations, including disability advocacy groups, youth groups, ethnic minority organisations, and LGBT+ groups, to ensure that we involve and consult people on issues that affect them. Projects and activities mentioned below demonstrate our efforts in building close partnership with our communities and community-based organisations. We have been actively searching out organisations and groups who can help us to understand and connect with the people we need to be working with and for. Our dedicated page *Communities | Historic Environment Scotland*² has been created to provide information and resources we offer to the communities.

The pandemic has brought many challenges and highlighted the inequalities already present in our society. We recognise that we have a long way to go to address these inequalities. Through the feedback we received, we believe our engagement resulted in positive impacts on our communities.

HistoricScot Forum: HES, Young Scot and the HistoricScot forum have been working together to explore how to involve young people in the heritage sector, and how to make it more accessible. Founded in 2020, the forum comprises a group of 25 young volunteers aged 11-25 from a variety of backgrounds across Scotland. In 2021, they gave initial recommendations for the sector, and they have collaborated with HES and launched the *Youth Action Plan*.³

Rediscovering Antonine Wall: Funded by the NHLF and led by the Heritage Directorate in collaboration with five local authorities (West Dunbartonshire, Glasgow City, East Dunbartonshire, North Lanarkshire, and Falkirk). The project was designed to increase awareness and understanding of the monument, running for 37 miles across central Scotland, across numerous different communities including some of the most economically and socially deprived in the country.

These include:

- Partnership with ‘Cycling Without’, helping the less mobile to visit Antonine Wall sites using a trishaw.
- Five Roman-themed playparks.
- A Community Conference in September 2021, including hosted morning walks followed by an afternoon online lecture. All lectures are now available on the Antonine Wall YouTube channel.
- A new traveling exhibition ‘The Antonine Wall, Beyond Boundaries’ that travelled to museums in 2022.
- A Refugee Project started on December 2021 and was completed in August 2022. This project engaged with refugee-led community groups to celebrate diverse forms of storytelling, discover global connections of local areas in the past and present, and created new contexts of community belongings with refugee and asylum seekers to explore the history of the Wall and the ethnic diversity of Roman and modern local populations.

² <https://www.historicenvironment.scot/advice-and-support/communities>

³ <https://youngscot.net/ysobservatory/historicscot-youth-forum-final-report-and-youth-action-plan>



Eternal Connections: Three small fragments of glass discovered by archaeologists at Caerlaverock Castle inspired a collaborative community project to recreate the original object – a 12th Century Islamic glass drinking beaker. Historic Environment Scotland (HES) successfully sought funding from the Arts and Humanities Research Council’s Capability for Collections Public Engagement Fund to improve its understanding of the first and only Islamic artifact to be found at an archaeological site in Scotland. We engaged with two community groups, AMINA Muslim Women’s Resource Centre and the Muslim Scouts of Edinburgh to stimulate discussion around the heritage of Scotland’s Muslim communities, and to undertake a range of creative practice in response both to these stories, and the 3D replicas of the medieval Islamic glass beaker. The project was co-designed with these two groups, and it created a space to explore the ideas around identity, belonging, and connections. The project ran from February to August 2022.

BSL (British Sign Language) Tours: As part of the recovery from the COVID-19 Pandemic, our BSL tour resumed at Edinburgh and Stirling Castle in April 2022. Additionally, we organised a *Castle of Light: A Kingdom of Colours* event access night. It included autism-friendly, BSL and audio scribed tours.

OUTCOME 2 – We deliver responsive services to meet the needs and expectations of diverse groups.

To embed the culture of equality and inclusion, in the last two years, we reviewed our strategies, policies, and frameworks to align them with our Equality Outcomes. Our focus has been on having a standardised organisational approach to creating a real sense of equality in all our functions.

Our Learning and Inclusion team designed a framework of learning that focuses on ‘*Discover YOUR SPACE*’ in Scotland’s historic environment. We supported a wide range of learning aims and outcomes, and participants benefitted from a meaningful experience which enhanced

their learning. The framework engaged learners who are from underrepresented and vulnerable groups, who have additional support needs or who have no previous experience and would not otherwise have had this opportunity. This was achievable by supporting access, creating engaging content and delivering projects and programmes inspired by our sites, collections, archives, and expertise. Working in partnership was key to achieving this and enabled us to target groups who would not normally have the opportunity to take part.

In our recently refreshed Research Strategy, tackling inequality and promoting diversity and inclusion are core considerations across our research activity. In line with our Equality Outcomes, we are committed to broadening our partnerships and the audiences for our research, and to co-designing and co-producing our research with community partners.

We are already a digital-focused organisation, leading in many distinct aspects of digital conservation (such as

digital documentation), online engagement, education, events, and interpretation. However, in response to the impact of COVID-19 and the escalated need to digitally transform, we have revised our Digital Strategy to address the challenges we face and identify the opportunities now open to us.

Examples:

As part of our Equality Action Plan and our commitment to heritage for all, we developed and published our position on heritage, history, and race. Through this statement, we aim to empower and enable our colleagues to take effective action in addressing inequalities and build relationships with our diverse communities in a manner that acknowledges our shared history, tells all sides of the story candidly, builds trust, and brings our communities together.

PiCs (Properties in the Care) and the **British Empire Project:** Led by HES's Cultural Resources Team, this project aims to investigate and understand the imperial connections of the PICs, by situating their historical owners within the activities of the British Empire, including the transatlantic slave economy and other colonial activities. The research commission is underway. The anticipated date for the final report is Summer 2023.

Managing Imperial Legacies

project: A two-year partnership project between HES, UoE, and the Coalition for Racial Equality and Rights (CRER) funded by a Royal Society of Edinburgh (RSE) Networking Grant. The project enabled conversations involving academics, heritage organisations, professionals, and communities on the subject. In June 2022, the first phase of the project culminated in a conference hosted by HES. The second phase of the project is underway where a Black artist is working on creating an artwork that will focus on discussions linked to Empire (including but not limited to the transatlantic slave trade) and Scotland's built environment

Auld Reekie teaching resource: HES's World Heritage team launched a new teaching resource called 'Go Auld Reekie', a teaching pack that tells us about life in Edinburgh during the 18th century. Presented in the format of a handling box, this aims to tell the story of the Old and New Towns of Edinburgh World Heritage Site during a period of real change in the city. Visitors were able to interact with the resource and participate in various craft activities to learn about old Edinburgh. We were joined by a costumed interpreter who re-enacted one of the Black characters from the resource, John Edmonstone. Visitors thoroughly enjoyed learning

about his story from an enslaved man to Edinburgh taxidermist, including John's connections to teaching a young Charles Darwin taxidermy skill.

Unforgettable: *The untold stories of people who shaped Scotland* – an exhibition that explores the lives of 12 individuals outwith mainstream history. The exhibition featured the unheard stories of Walter Sholto, Tom Johnson, Agnes Dollan, Ethel Moorhead, Sophia Jex-Blake, Diwan Pitamber Nath, Tom Jenkins, Dr Margaret Blackwood, Andrew Hardie, Seonaid Padraig and Joseph Knight.

Increased engagement with young people: We have worked with Young Scot to increase engagement with young people. We were successful in selling 7,948 £1 Visit tickets in 2022.

Supporting vulnerable communities: We have distributed resources and worked with community partners over the summer, including sessions in Stirling and Edinburgh for the Discover Food Poverty programme.

Trinity Tales/Tiny Trinity Tales: Digital conversion of storytelling tours, filmed in Trinity House and shared via the HES YouTube channel as part 'Learn at Home' programme.

Discover Programme: Activities to support Edinburgh Council's food poverty programme providing meals and learning opportunities for supported families during school holidays.

Digital storytelling sessions: We offered sessions for February and Easter holidays, and maritime-themed 'play sessions' were delivered as part of the summer holiday programme at a series of local parks across Edinburgh. Overall, 451 participants engaged with digital sessions and 97 took part in park activities. Feedback from participant families notes both the opportunity to learn new things at home during the lockdown and to re-connect with other parents while children enjoyed facilitated activities.

Unlock and Revive: A series of digital sessions were delivered to support this Edinburgh University Museums-led project using a 'prescribed culture' approach to support both students and local organisations with wellbeing and mental health programmes. Our contribution helped bring Trinity House collections to new audiences such as delivering reminiscence sessions for Alzheimer's Scotland.

Response to the Refugee Crisis:

Examples of activity in the last two years:

- Play bags put together for Dnipro Kids Charity to support the new arrivals of Ukrainian orphans. The packs were for the 'family units'. The Dnipro Kids were also invited to visit Inchcolm Island.

- Donated items supplied by Retail to the Chernobyl Children's Lifeline Fife Link group to raise money for families in Ukraine who they have been supporting for years who have been displaced or are still in Ukraine.
- Supplied some clothing to PKAVS in Perth who are supporting recent refugee arrivals from a range of countries including Ukraine, Afghanistan and Syria.
- Play bags for Afghan refugees children arrived in Dundee in 2021.



OUTCOME 3 – We attract, recruit, and develop a diverse Board, workforce, and volunteer base.

We have been working hard to improve the diversity of our workforce in relation to a range of characteristics. We recognise this as a challenge and continuously work to overcome this challenge. We have introduced a wide range of initiatives including the new Inclusive Recruitment Training and Inclusive Recruitment Toolkit as part of our commitment.

We have worked with our Trade Unions and employee forums to produce a recruitment toolkit that focuses on inclusive recruitment practices and universal design. This aims to make the recruitment process straightforward and inclusive, creating better experiences for all applicants during our recruitment process. We have also implemented training throughout our organisation for hiring managers on inclusive recruitment practices, and we continue to roll this out each quarter.

We have partnered with external organisations representing underrepresented groups to get guidance and support with our journey towards diversity. Our work with them focused on removing blocks and barriers in our organisation and making our recruitment process more accessible.

We are working in partnership with West of Scotland Regional Equality Council (WSREC) has secured funding from the Scottish Government’s Workplace Equality Fund (WEF) to work in partnership with us over the next two years. The Partnership Project combines the expertise of a highly experienced third sector equality council, a lead public sector heritage organisation and a specialist collective in leadership development to overcome structural barriers to race equality in the workplace. WSREC will provide Historic Environment

Scotland with training, advice, and guidance to ensure recruitment campaigns are accessible to minority ethnic communities through each stage of the process from advertising to hiring.

Apt is a Public Social Partnership (PSP) funded by the Scottish Government, on a mission to reduce the Disability Employment Gap. We have been working in partnership with the Scottish Union of Supported Employment (SUSE) in our commitment to reduce the disability employment gap and improve access to meaningful work for disabled people. This partnership is helping us reduce the disability employment gap and position us as an employment destination of choice for disabled people in Scotland.

We have strengthened our partnership with Inclusion Scotland; they provide us with their expert advice and advertise all HES posts through their channels and networks and review the language and accessibility of our job adverts.

We signed up for LGBT Charter March, and LGBT Youth Scotland is supporting us to achieve the LGBT Charter Mark. It provided us with increased knowledge on LGBT identities and greater understanding of the barriers faced by LGBT young people in Scotland. We aim to have a greater understanding of inclusive practice to create an LGBT inclusive service/working environment.

Due to the pandemic, the number of volunteers working with us dropped significantly. We have invested in renewing our volunteer framework and finding innovative ways to attract diverse individuals. We are a partner in the Make your Mark Campaign. We are also connecting with our partners and community groups to change the demographics of our volunteer base.

In the last two years, our focus has been on working on our structures and creating an environment where all employees feel included, empowered, and valued. We have reviewed and updated our Equality, Diversity,

and Inclusion Policy which aligns with our Equality Outcomes and Action Plan. We launched our mandatory Equality e-learning course, which was completed by 95% of our colleagues in March 2022.

The pandemic has heightened our focus on our people's mental health and wellbeing and this is also a big part of our people plan. We ran various wellbeing campaigns including menopause talking circles and Mental Health First aiders. We also ran the Mental Health Awareness & Action Training for Managers course to equip managers to support their teams.





To support the development of a strong HES culture, we have created a framework of jointly owned behaviours that will shape the experience of every individual in the organisation. We want our teams to work with these behaviours and take action to weave them into your daily working lives. Our hope is that by implementing ‘Our Behaviours,’ we can find ways to continue developing and improving together, all in the support of making HES a great place to work. The behaviours include:

- Taking personal ownership
- Focusing on our impact
- Working at the right pace
- Ensuring we include others fully
- Exploring challenges together
- Learning as we work
- Sharing success at the right moments
- Taking the responsibility to lead.

Employees are our biggest assets and we have been working on providing training and awareness for staff to learn about and explore the value that difference brings to a modern workplace. Examples of our internal work in the last two years:

- Equality news articles/vlogs/blogs through internal channels
- EDI (Equality, Diversity, and Inclusion) awareness raising sessions across HES teams
- Disability Training by Inclusion Scotland
- Heritage and Race Equality Training by WSREC
- LGBT training by LGBT Youth Scotland
- Events run by our networks – some examples of these events are:
 - HES Pride March events
 - Talk with the Governor of Edinburgh Castle, Major General Alastair Bruce
 - Identity Crossroads
 - Talk with Sir Geoff Palmer during Black History Month
 - 16 Days of Activism against gender-based violence
 - Youth Forum Annual Event.

Our employees’ networks played a vital role in promoting cultural change in the organisation. All networks have visibility and enjoy support and engagement from our executive leadership sponsor and regular attendance from senior leadership. With support from senior leaders, the networks effectively provided a collective voice for our people. They also provided senior leaders involved in them with an opportunity to gain insights into employee perceptions of what is happening ‘on the ground’ and awareness of how policies and practices impacted our people.

CONCLUSION

Our corporate outcomes and values, and supporting strategies and policies, support our work to meet our public sector equality duties.

We have established an appropriate equality governance structure through which we can identify, deliver, and monitor our equality outcomes. At the heart of these actions is a resolve to further influence organisational culture by promoting a workplace which respects and values diversity, and recognises and meets the needs of staff and our visitors who have protected characteristics. We are able to report on a number of projects, initiatives and activities that demonstrate our commitment and highlight the difference we are making in delivering our equality outcomes.

We expanded our involvement with diverse communities and equality organisations. This has enabled us to build new contacts and engage in new conversations which have influenced our work to widen access and participation.

We believe that sound progress is being made. We recognise there is still much work to do, and we have confidence that our forward plan set out below maintains our momentum.



EQUALITY OUTCOMES 2023 – 2025

This section provides a look ahead to our actions for the next two years and indicate our commitment to the equality work.

We will report on progress against the actions set out below in April 2025 which complies with our next statutory reporting period.

KEY ACTIONS 2023 – 2025

The following high-level actions will enable HES to develop activity which will become part of the operation service delivery.

Mainstreaming equality within our general practice aims to affect both cultural and systemic change within HES so that equality is integrated into our day-to-day working.

It is a long-term, strategic approach to ensuring that equality, diversity, and inclusion sit at the heart of HES's culture and operational delivery. It is not a quick fix, but requires time, resources, support of specialist staff and the commitment of senior management and leaders.

Mainstreaming is an effective way to ensure that the whole of HES is delivering on its public sector equality duty.

We will continue these conversations and organise a series of specific external engagement events with equality organisations to assist us in achieving our current outcomes and developing our next set of Equality Outcomes in 2025.

OUTCOME 1 – We make a real difference to people's lives

- Work with external public sector networks, equalities networks and organisations to grow our knowledge and understanding of equality, share best practice and develop new partnership projects and initiatives.
- Undertake wellbeing research that has equality, diversity and inclusion at its centre and apply the research to the design of services including grants, education, and learning.
- Develop a programme of activity focused on reaching communities that the evidence shows currently only have limited involvement with the historic environment.
- Collaborate with the Five Nations (England, Scotland, Wales, Republic of Ireland and Northern Ireland) Heritage Wellbeing Group to look at practical delivery of initiatives to maximise research across all groups.
- Partner in the Make Your Mark volunteering campaign to promote volunteering to underrepresented audiences and commission research into the social value and impact of volunteering.
- Explore how to develop a measure of societal impact from our public and community engagement.
- All Directorates will identify equalities activities to deliver this outcome annually in line with the annual operating planning process.

OUTCOME 2 – We deliver responsive services to meet the needs and expectations of diverse groups

- Develop a programme of activity that addresses gaps in our records and interpretation in relation to the historical connections with the British Empire and Transatlantic slavery.
- Continue to develop new academic partnerships like those on Deaf Heritage and Managing Imperial Legacies that contribute to future policy and practice.
- All Directorates will identify equalities activities to deliver this outcome annually in line with the annual operating planning process.
- Discover new and hidden histories connected with the historic environment by undertaking a programme of research and engagement with diverse communities.

OUTCOME 3 – We attract, recruit, and develop a diverse Board, workforce, and volunteer base

- All Directorates will identify equalities activities to deliver this outcome annually in line with the annual operating planning process.
- Create a Future Skills Plan that is inclusive, accessible and encourages a positive investment in our workforce of the future.
- Work towards 5% of our workforce resourcing budget as future skills roles, taking positive action in recruitment, induction, and pastoral support to develop representation from underrepresented groups.
- Partner with schools, colleges, and universities to promote career opportunities and engagement.
- Create the right environment within HES with an understanding of the importance of equality for all.
- Deliver and embed a Behaviours Framework in which equality underpins everything we do.
- Produce annual pay gap reports that will include ethnicity, disability, and gender.
- Encourage employee declaration for equality monitoring purposes through information campaigns and user-friendly systems.
- Ensure that Equality, Diversity, and Inclusion underpins all colleague learning journeys.
- Review and re-launch equality e-learning programme.
- Work with the employee groups and networks to put in place appropriate learning interventions to promote and develop our people's understanding of equity and drive their ability to challenge inappropriate behaviours in a positive way.
- Create and implement an emerging talent programme for future leaders, ensuring that those from underrepresented groups are prioritised on the programme and it includes equality training.
- Develop a mentoring framework to support the growth and development and support of our leaders, prioritising requests from underrepresented groups for mentoring.
- Mandatory Equalities e-learning training for all colleagues, with completion target of 95% of all HES colleagues.



UNDERSTANDING THE IMPORTANCE OF EQUALITY FOR ALL



ANNEX B- WORKFORCE EQUALITY MONITORING

DATA ANALYSIS COMMENTARY

This section of the report provides an overview of our equality and diversity employment monitoring data for 2021 and 2022. It covers age, disability, pregnancy and maternity, race, gender reassignment, marriage or civil partnership status, religion or belief, sex, and sexual orientation. Our people included in this report are those on payroll with us as at the monitoring date of 31st December each year.

Information is published in accordance with the Data Protection Act 1998 and does not identify individuals, and information about groups of people fewer than ten is suppressed to protect anonymity. Our workforce headcount in 2021 was 1,420 and in 2022 was 1,502. Information is published in percentages only. Information is only reported on colleagues paid through our payroll and excludes Board Members, Agencies and Contractors.

In terms of data quality, we encourage our staff to provide equality monitoring data. Supplying this information is voluntary, and individuals can choose what they wish to declare. We do include a 'prefer not to say' option against all monitoring questions. In 2022 we completed a restructure; the data provided is based on the new Directorates for both 2021 and 2022. We are preparing to carry out a self-declaration exercise to encourage our people to use the new self-service portal and update their records.

HES STAFF ARE
ENCOURAGED TO
PROVIDE EQUALITY
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SCOPE OF REPORT

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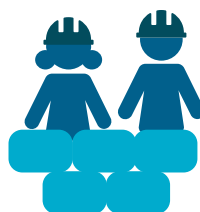
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PROGRESS AGAINST OUR EQUALITY OUTCOMES 2021-2025

Our Equalities Outcomes for 2021-25 are that we will attract, recruit and develop a diverse Board, workforce and volunteer base.

- Board gender representation is 6:4 with a male Chairperson. Other equality information is not known within our Board as this is held with Public Appointments Scotland as part of the recruitment process.
- Our female:male workforce ratio is 48:52. 81% of our workforce have declared their ethnic origin. 2% of people have self-declared a disability. 20% of people have provided us with information relating to sexual orientation/identity.
- Our gender pay gap remains low.
- We have closed the gap on the disability and ethnicity pay gaps.
- We are recognised as a Disability Confident Employer.
- We have retained our Healthy Working Lives Gold award.
- We have achieved Carer Positive Established employer status.
- We have provided dedicated recruitment training across the organisation and launched our inclusive recruitment toolkit to provide additional support and guidance for recruiting managers.
- We have actively supported the employee networks and have recently established the 'Thinking Differently' Network.



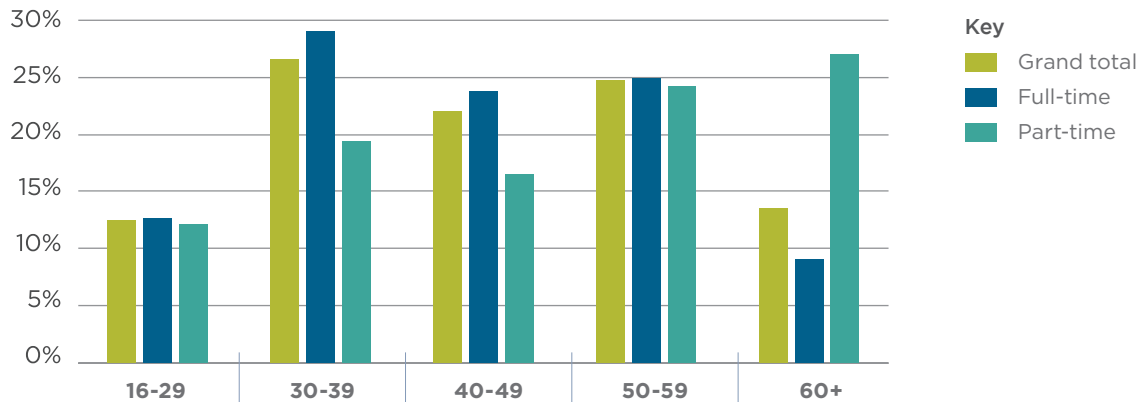
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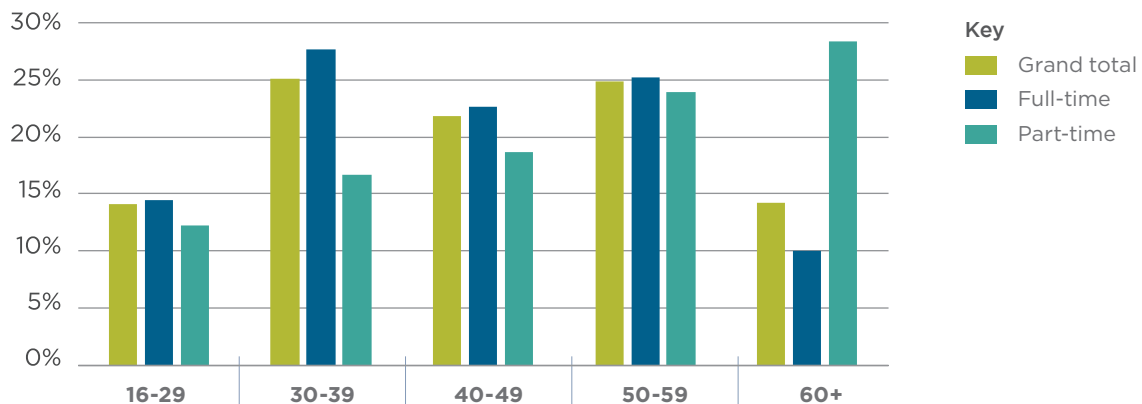
AGE AND WORK PATTERN

2021



	16-29	30-39	40-49	50-59	60+
Grand total	12.61%	26.83%	22.11%	24.86%	13.59%
Full-time	12.75%	29.24%	23.90%	25.02%	9.09%
Part-time	12.18%	19.55%	16.71%	24.36%	27.20%

2022

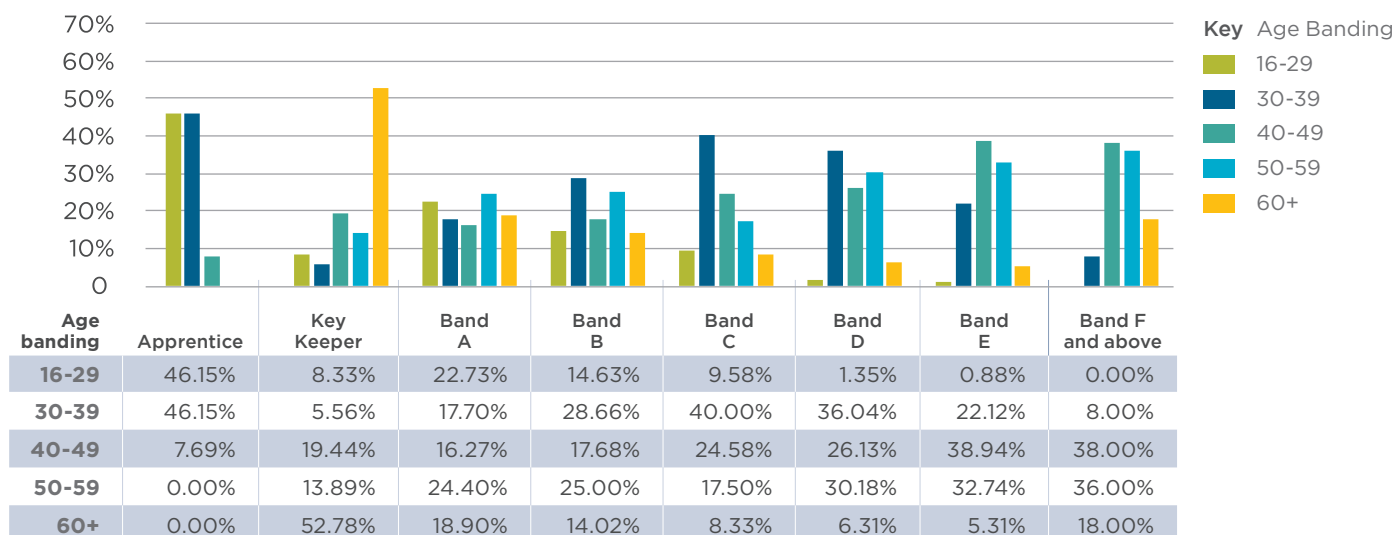


	16-29	30-39	40-49	50-59	60+
Grand total	14.11%	25.03%	21.77%	24.83%	14.25%
Full-time	14.46%	27.62%	22.68%	25.19%	10.04%
Part-time	12.28%	16.67%	18.71%	23.98%	28.36%

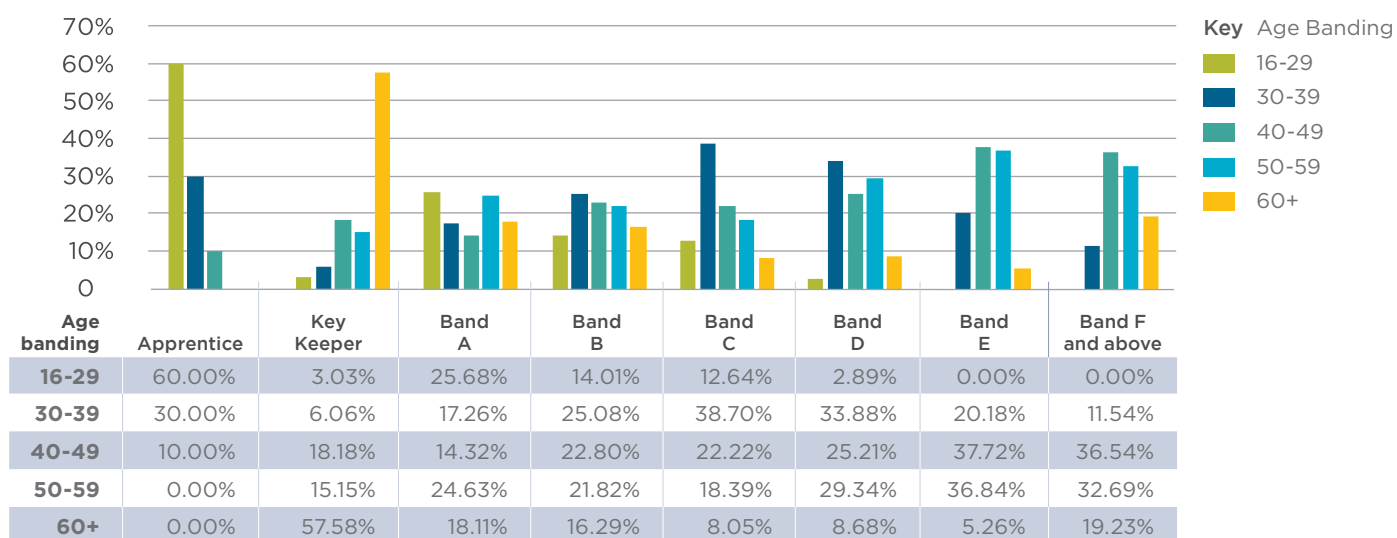
EMPLOYEE AGE PROFILES FOR 2021 AND 2022

AGE AND BAND

2021



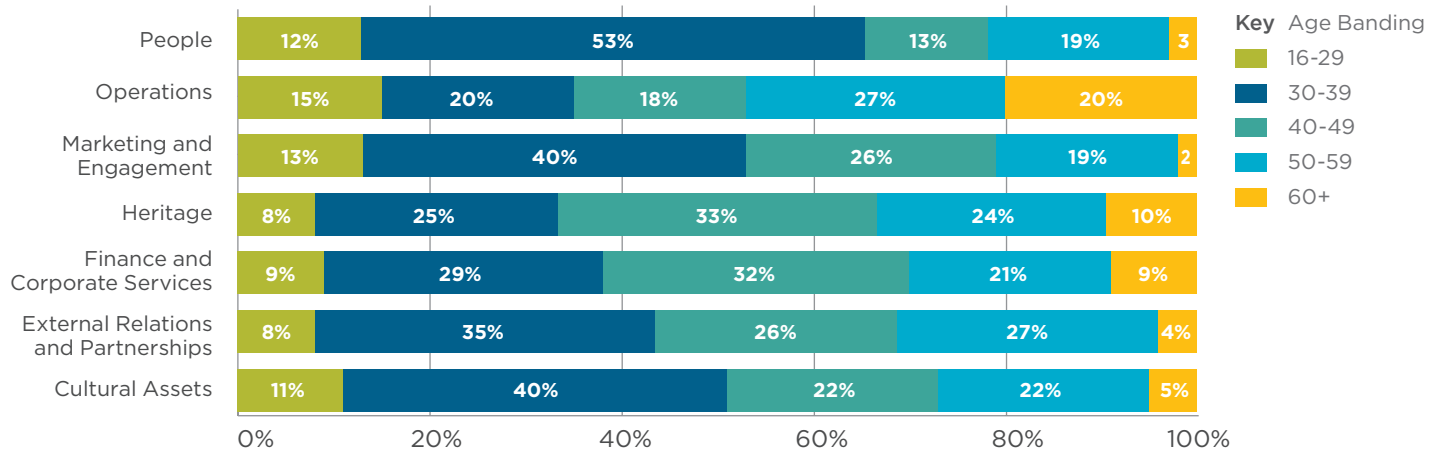
2022



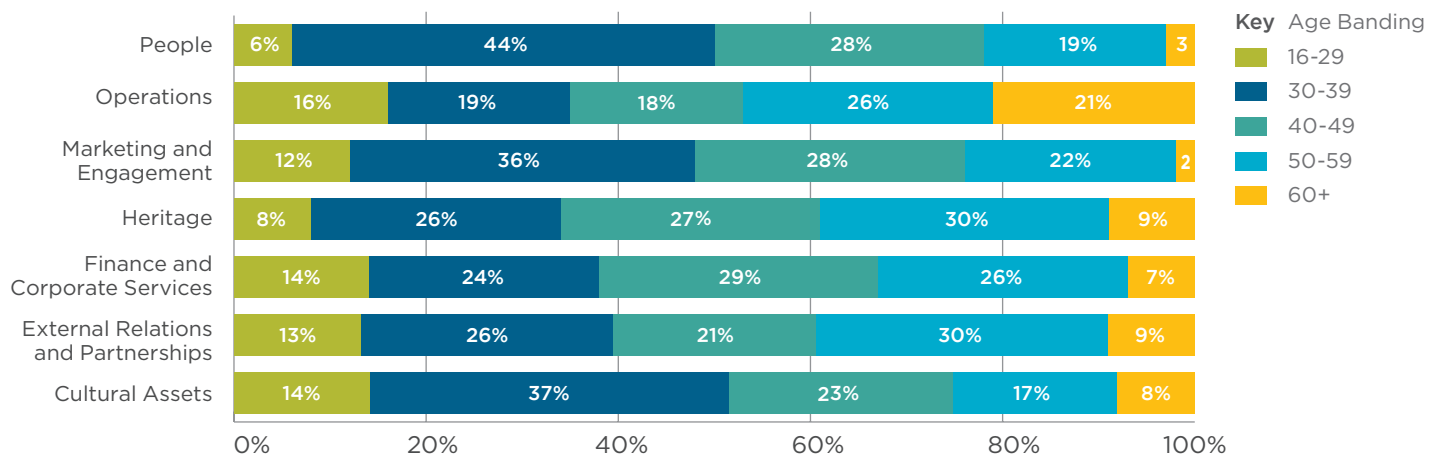
EMPLOYEE AGE PROFILES FOR 2021 AND 2022

AGE BY DIRECTORATE

2021



2022



AGE COMMENTARY

- Stable comparison overall.
- Our 16-29 age profile is underrepresented.
- Our Skills Investment Plan, continues to enable us to work with others across the sector to create training pathways.
- Recovery from the COVID-19 pandemic has slowed the increase in number of apprentice roles.

AGE ACTIONS TO CONSIDER

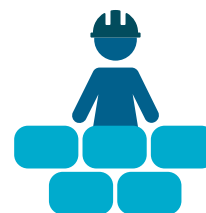
- Explore further opportunities to provide pathways for young people to work in HES.
- Continue to work towards the 5% skills experience roles across HES.
- All Directorate recruitment campaigns should be informed by the diversity profile to identify potential for positive targeted action.
- Include apprentice roles as a key output of Strategic Workforce Planning.
- Share data with HES Youth Forum and discuss ideas/suggestions.



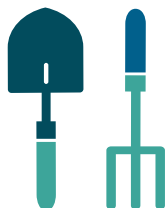
11 Internships



9 Traditional Skills
Craft Fellows



40 Apprentice Stonemasons
17 HES + 23 private sector



4 Apprentice Gardeners



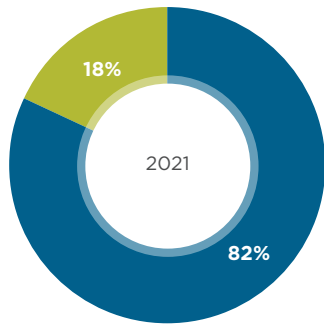
1 Apprentice Painter



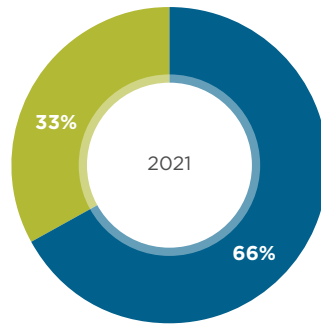
9 Tourism Apprentices

EMPLOYEE LEGAL GENDER PROFILES FOR 2021 AND 2022

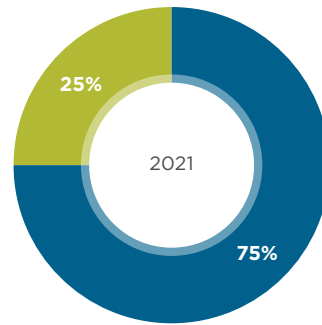
Female profile



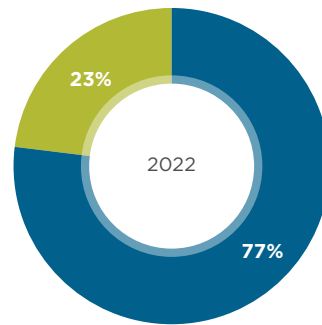
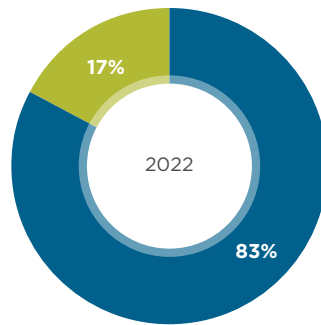
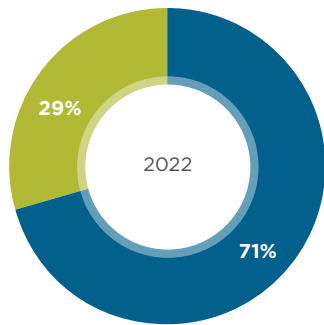
Male profile



All colleague profile



Key
■ Part-time
■ Full-time

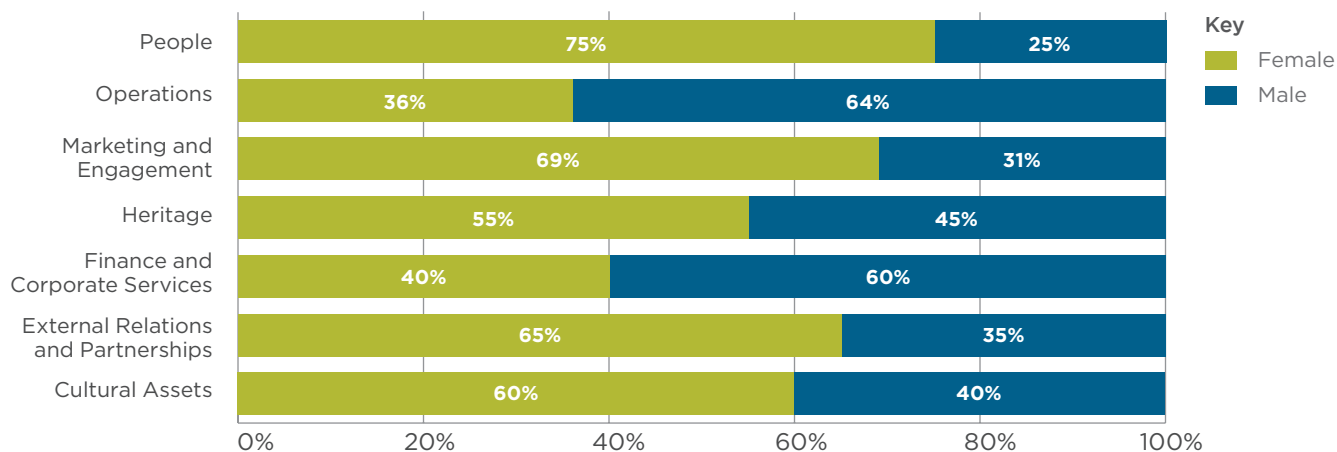


HES PROVIDE
 ACCESS TO A RANGE
 OF SERVICES FOR
 A POSITIVE WORK
 LIFE BALANCE

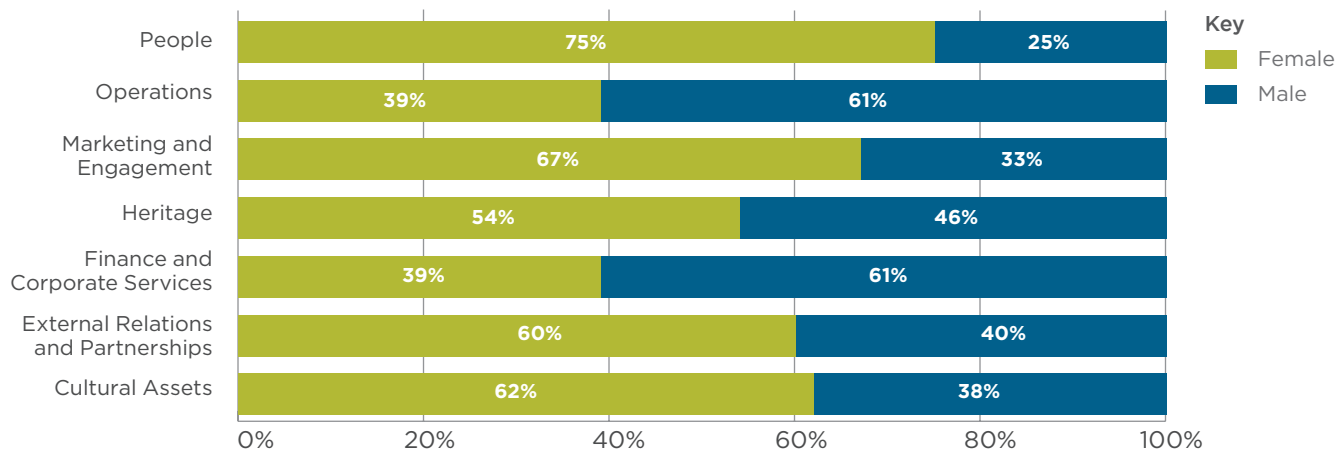
EMPLOYEE LEGAL GENDER PROFILES FOR 2021 AND 2022

BY DIRECTORATE

2021



2022



Balanced directorates:

- Heritage

Higher proportion of males:

- Operations
- Finance and Corporate Services

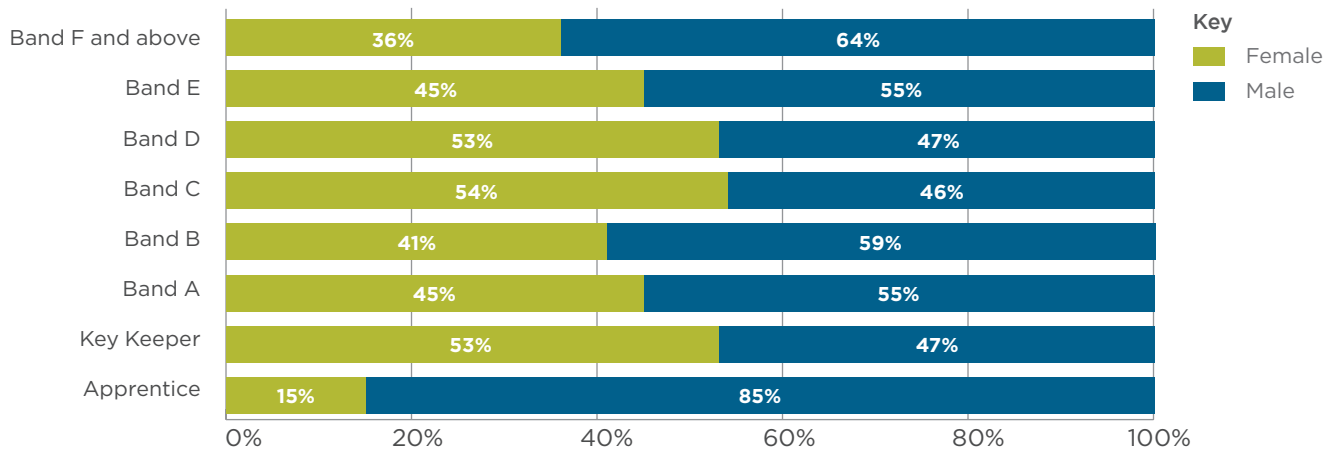
Higher proportion of females:

- People
- Marketing and Engagement
- External Relations and Partnerships
- Cultural Assets

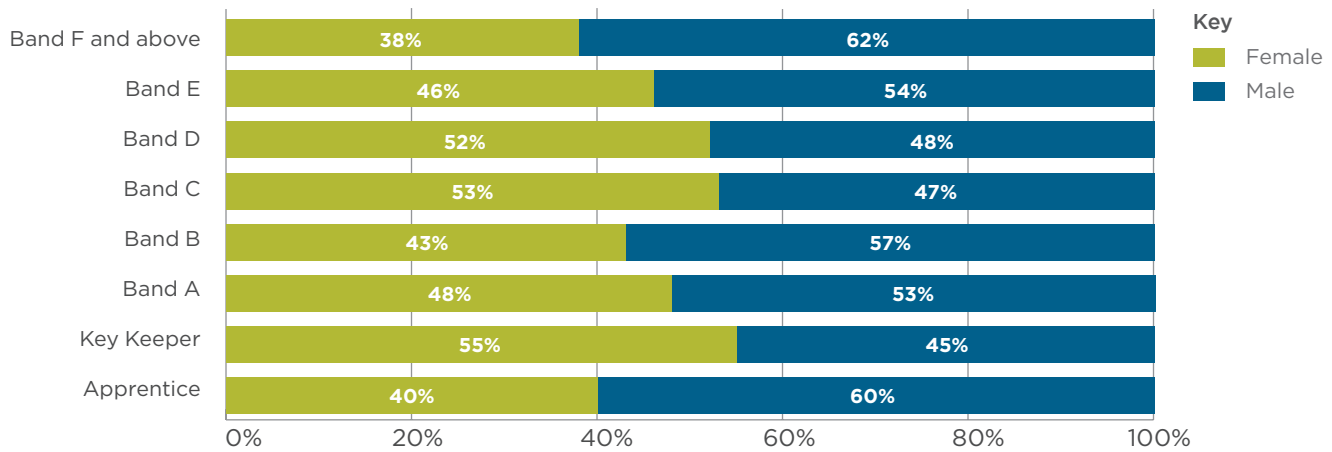
EMPLOYEE LEGAL GENDER PROFILES FOR 2021 AND 2022

EMPLOYEE PROFILE BY PAY BAND

2021



2022



Balanced pay bands:

- Band E
- Band D
- Band C
- Band A
- Key Keeper

Higher proportion of males:

- Band F and above
- Band B
- Apprentice

Higher proportion of females:

- None

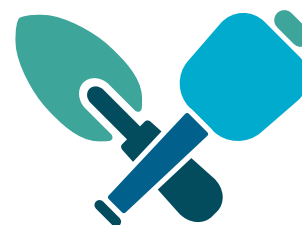
PROFILE COMMENTARY

- Stable comparison overall.
- Some Directorates have higher proportions of male/female employees.
- Part time working pattern is predominately female although this gap has closed by the end of 2022.
- 2021 apprentices by female/male 15%:85%
- 2022 apprentices by female/male 40%:60%
- The overall gender gap for HES has reduced by 2% and now sits at 48% female vs 52% male.

PROFILE ACTIONS TO CONSIDER

- All Directorate recruitment campaigns should be informed by the diversity profile to identify potential for positive targeted action.
- Continue to explore opportunities to bring females through the traditional skills route.
- Continue the 'working flexibly' project.
- Share this data with the Employee network groups.

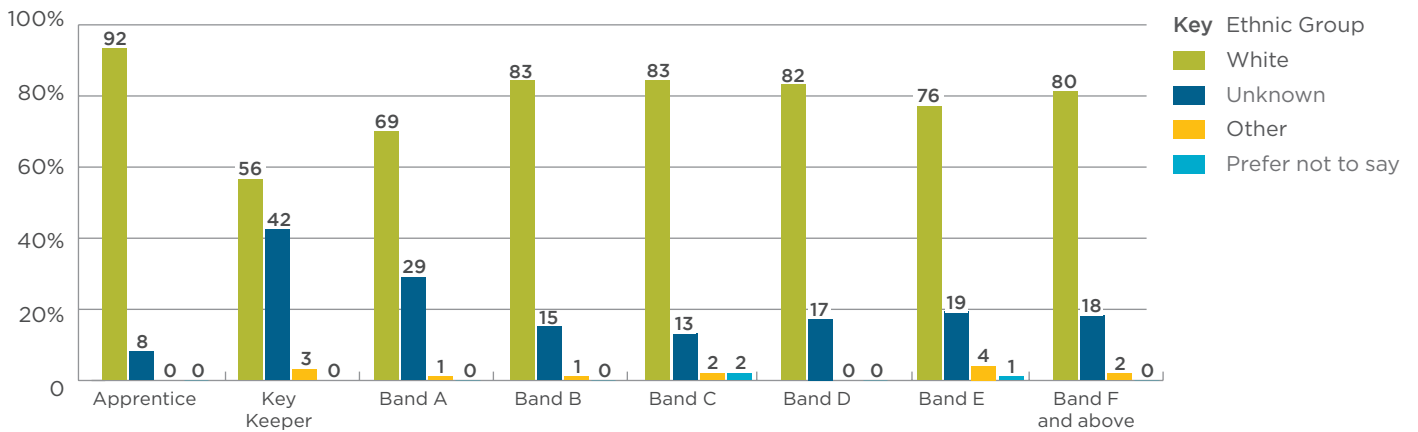
2022 APPRENTICES
BY FEMALE/MALE
40%:60%



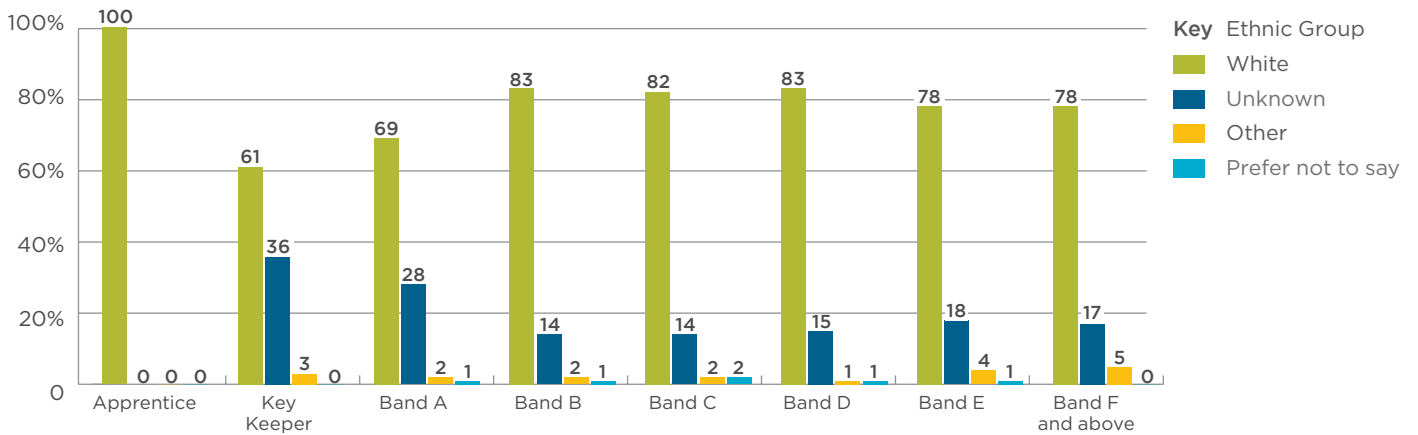
EMPLOYEE ETHNICITY PROFILES FOR 2021 AND 2022

ETHNICITY BY PAY BAND

2021



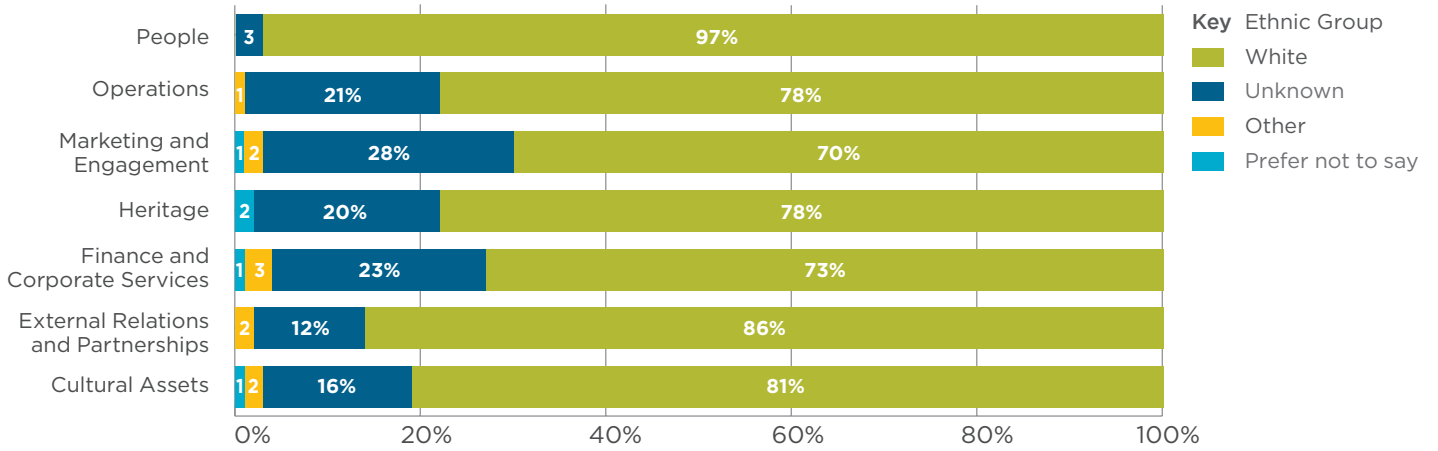
2022



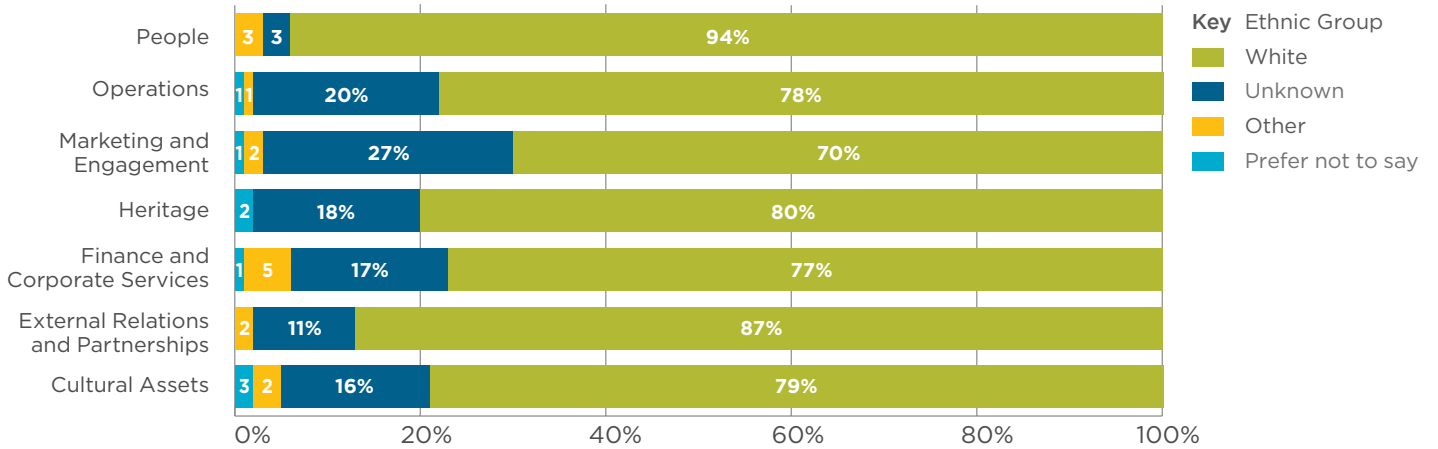
EMPLOYEE ETHNICITY PROFILES FOR 2021 AND 2022

ETHNICITY BY DIRECTORATE

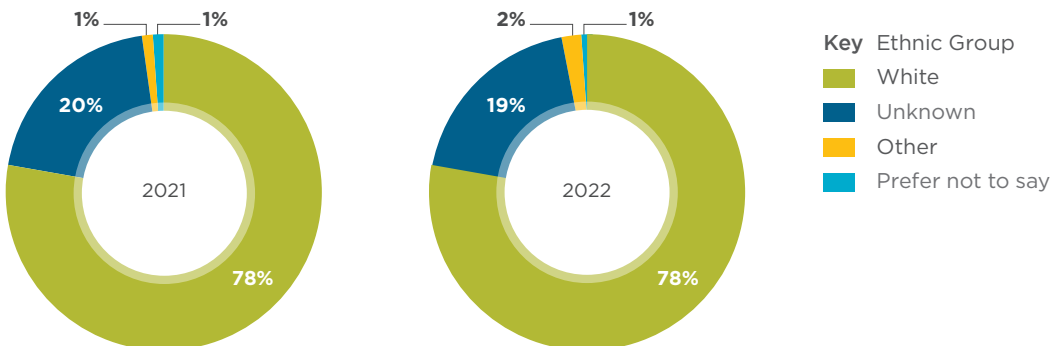
2021



2022



Employee Ethnicity Profiles



ETHNICITY COMMENTARY

- The numbers ethnic minorities staff remains low.
- Our data breakdown will inform our use of positive targeted action to improve our diversity.
- There was a 3% increase in ethnic minority colleagues at band F and above.
- We continue to have no declared ethnic minority colleagues at apprentice level.

ETHNICITY ACTIONS TO CONSIDER

- Self declaration exercise to be carried out and all staff encouraged to complete Oracle fusion self service portal information.
- All Directorate recruitment campaigns should be informed by the diversity profile to identify potential for positive targeted action.
- Make use of positive action for training roles e.g. targeted advertising to ethnic minority and/or Disabled communities.
- Continue to work with partners e.g. Next Step Initiative and Inclusion Scotland.
- Share this data with Equity Forum.

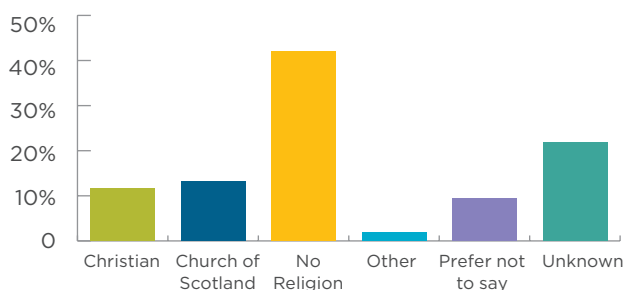


DELIVERING SCOTLAND'S HISTORIC ENVIRONMENT STRATEGY

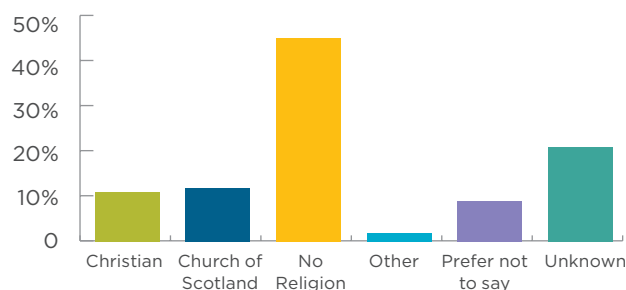
EMPLOYEE RELIGIOUS/BELIEF PROFILES FOR 2021 AND 2022

ALL EMPLOYEE RELIGION OR BELIEF

2021



2022

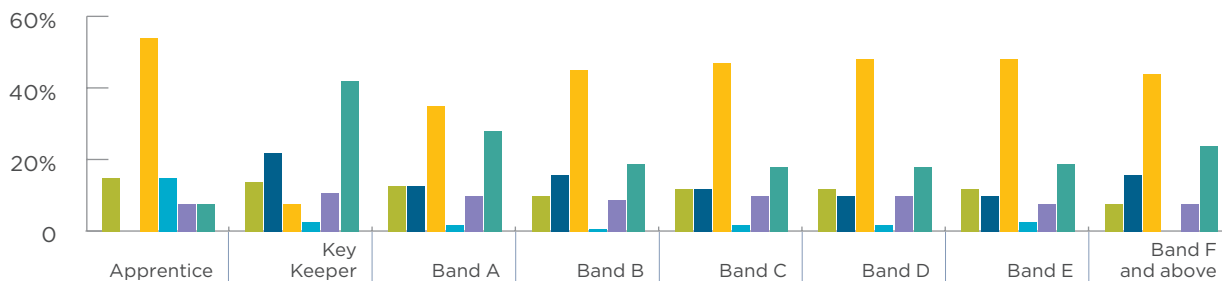


Key Religion or belief

- Christian
- Church of Scotland
- No Religion
- Other
- Prefer not to say
- Unknown

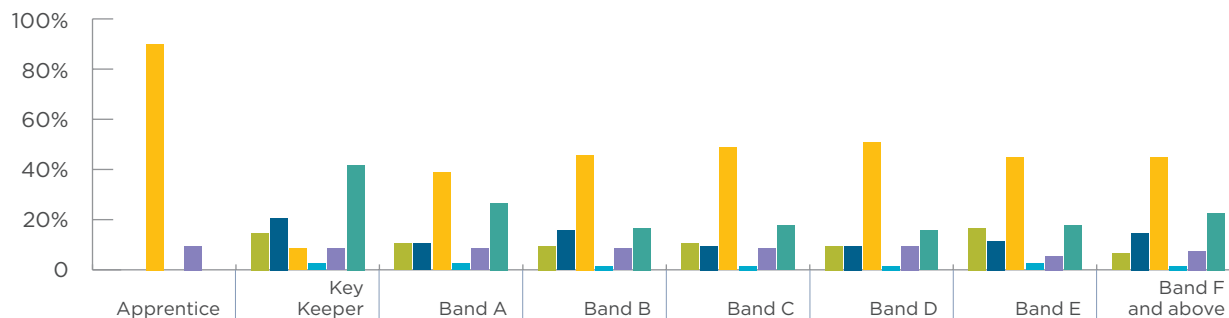
RELIGION BY PAY BAND

2021



Religion or belief	Apprentice	Key Keeper	Band A	Band B	Band C	Band D	Band E	Band F and above
Christian	15%	14%	13%	10%	12%	12%	12%	8%
Church of Scotland	0%	22%	13%	16%	12%	10%	10%	16%
No Religion	54%	8%	35%	45%	47%	48%	48%	44%
Other	15%	3%	2%	1%	2%	2%	3%	0%
Prefer not to say	8%	11%	10%	9%	10%	10%	8%	8%
Unknown	8%	42%	28%	19%	18%	18%	19%	24%

2022



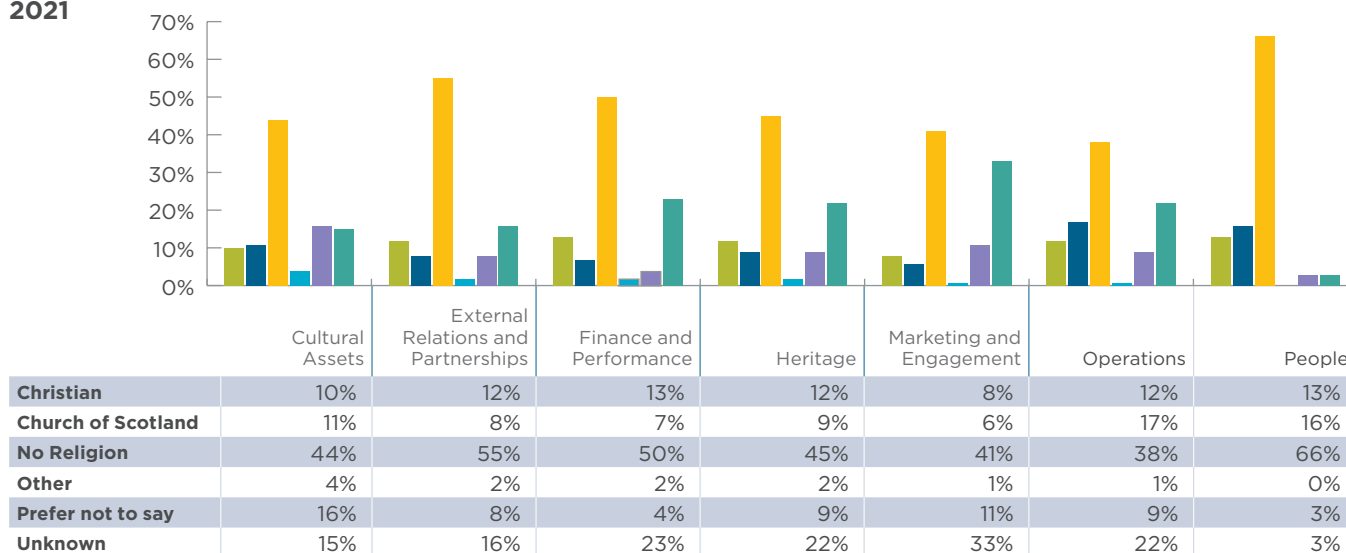
Religion or belief	Apprentice	Key Keeper	Band A	Band B	Band C	Band D	Band E	Band F and above
Christian	0%	15%	11%	10%	11%	10%	17%	7%
Church of Scotland	0%	21%	11%	16%	10%	10%	12%	15%
No Religion	90%	9%	39%	46%	49%	51%	45%	45%
Other	0%	3%	3%	2%	2%	2%	3%	2%
Prefer not to say	10%	9%	9%	9%	9%	10%	6%	8%
Unknown	0%	42%	27%	17%	18%	16%	18%	23%

EMPLOYEE RELIGIOUS/BELIEF PROFILES FOR 2021 AND 2022

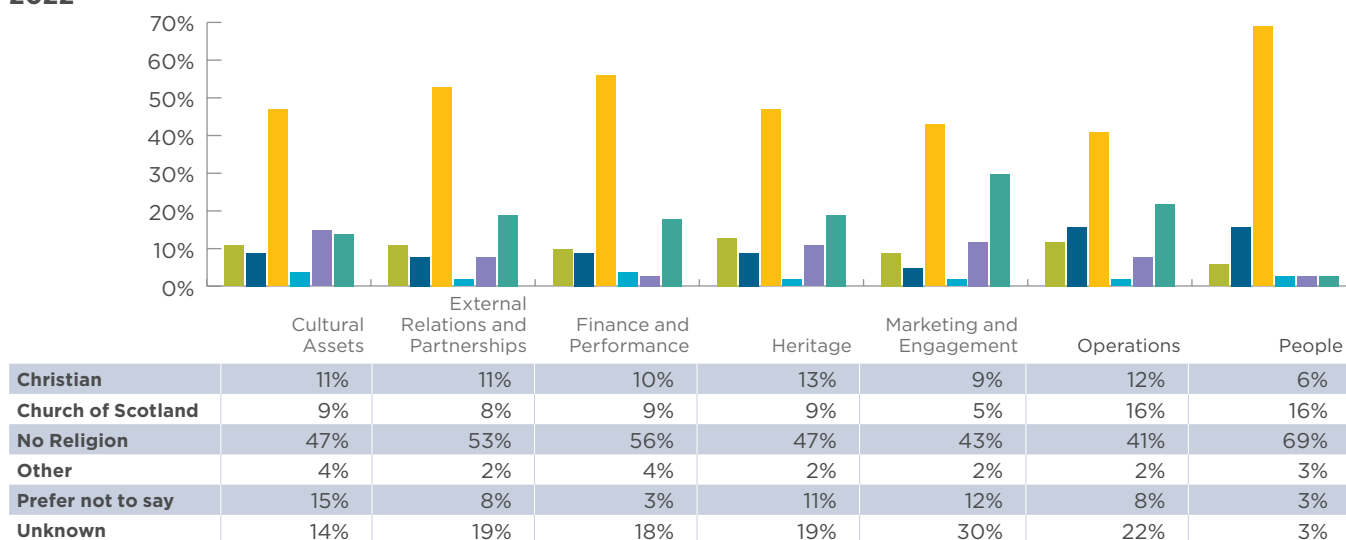
RELIGION AND PAY DIRECTORATE



2021



2022



RELIGION COMMENTARY

- Data remains stable across all variations religion data breakdown.
- Majority of employees identify as having no religion.

RELIGION ACTIONS TO CONSIDER

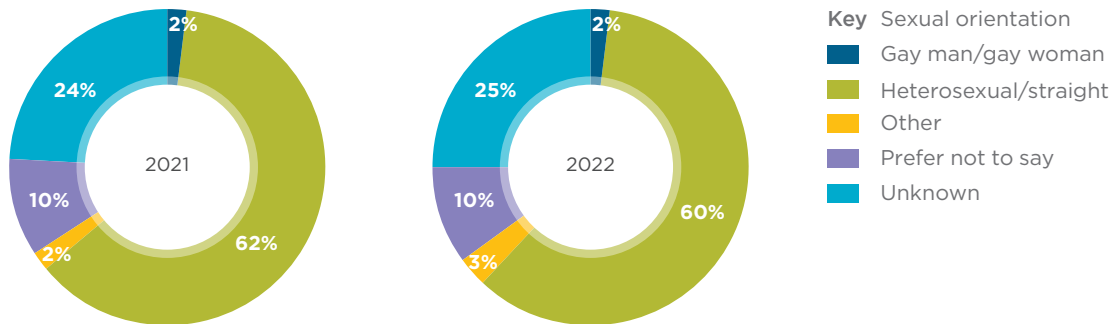
- Annual self declaration exercise to be carried out and all staff encouraged to complete Oracle fusion self service portal information.
- We will continue to work on the data in/data out developments as the new system is embedded.
- Explore the reporting of social diversity for the year ahead.
- Share with Equity Forum.

**THE MAJORITY
OF EMPLOYEES
IDENTIFY AS HAVING
NO RELIGION**



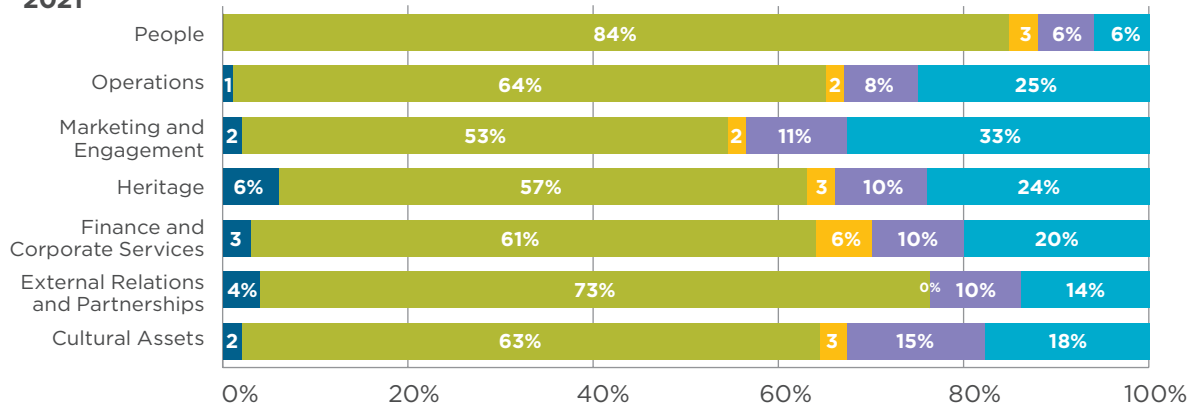
EMPLOYEE SEXUAL ORIENTATION PROFILES FOR 2021 AND 2022

TOTAL EMPLOYEES - SEXUAL ORIENTATION

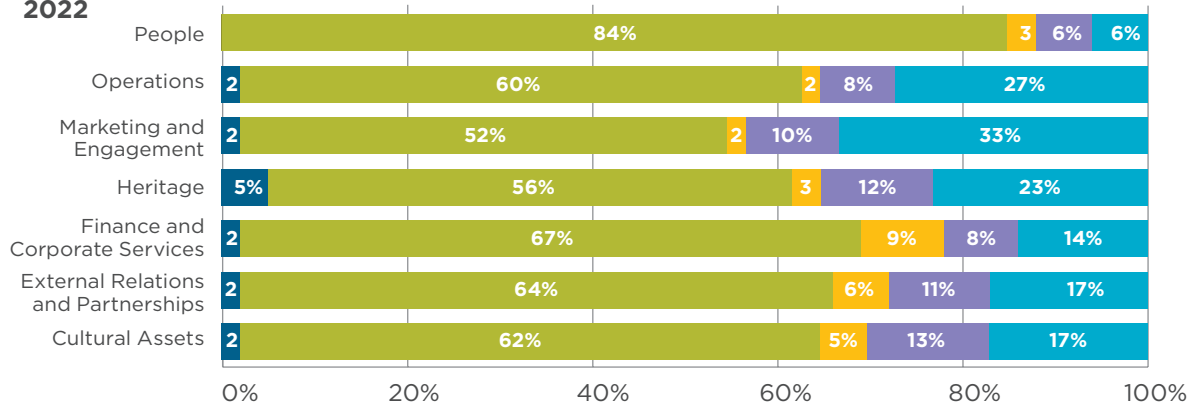


SEXUAL ORIENTATION BY DIRECTORATE

2021



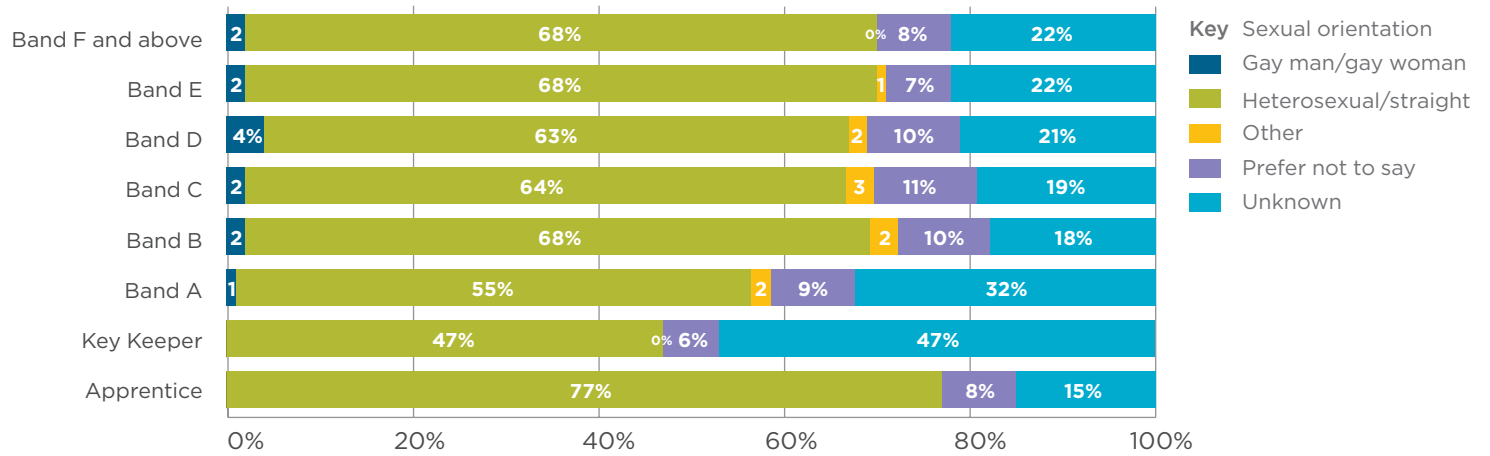
2022



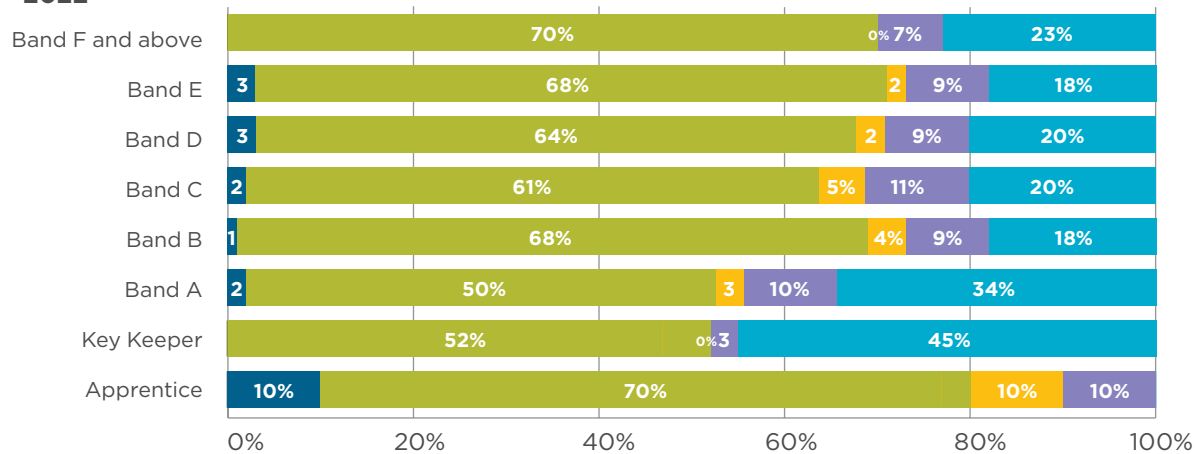
EMPLOYEE SEXUAL ORIENTATION PROFILES FOR 2021 AND 2022

SEXUAL ORIENTATION BY PAY BAND

2021



2022



SEXUAL ORIENTATION COMMENTARY

- Data remains stable across all variations of data breakdown.
- 25% of colleagues have not yet made a declaration.
- Key Keepers have a higher % of undeclared.

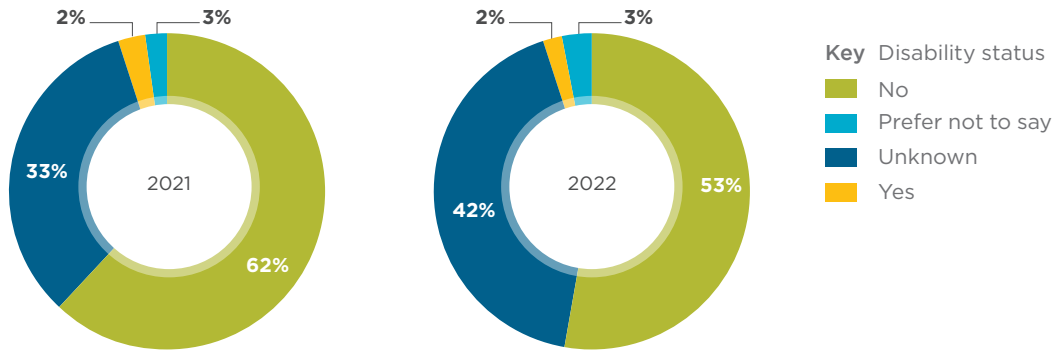
SEXUAL ORIENTATION ACTIONS TO CONSIDER

- Self declaration exercise to be carried out and all staff encouraged to complete Oracle fusion self service portal information specifically for gender identity.
- All Directorate recruitment campaigns should be informed by the diversity profile to identify potential for targeted action.
- Explore option of giving Key Keepers access to fusion to allow for self declaration. Share data and engage the LGBT+ network.



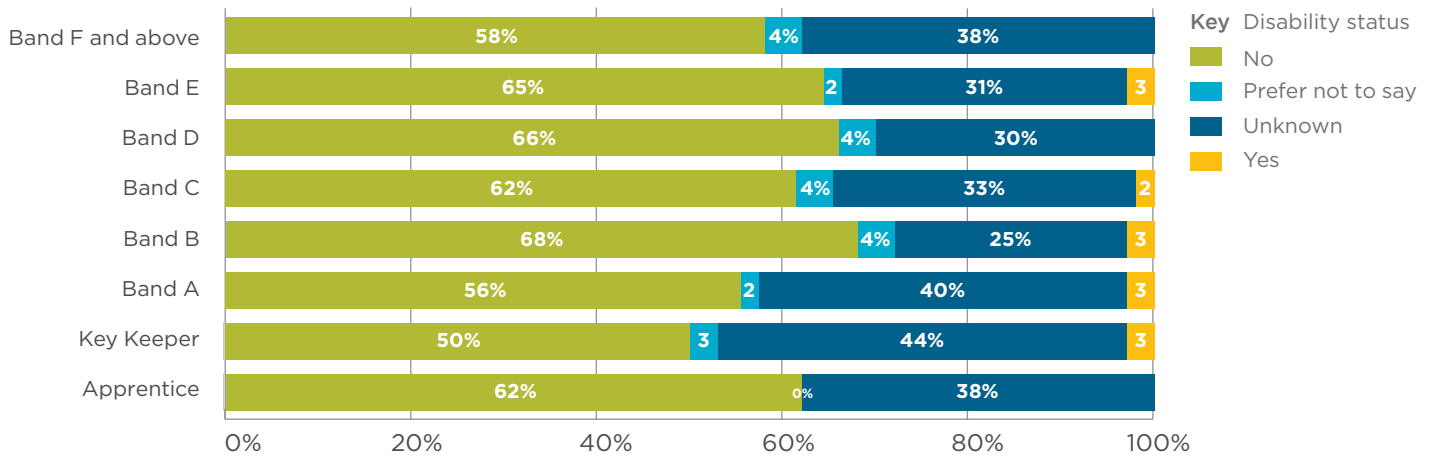
EMPLOYEE DISABILITY PROFILES FOR 2021 AND 2022

Employees and disabilities

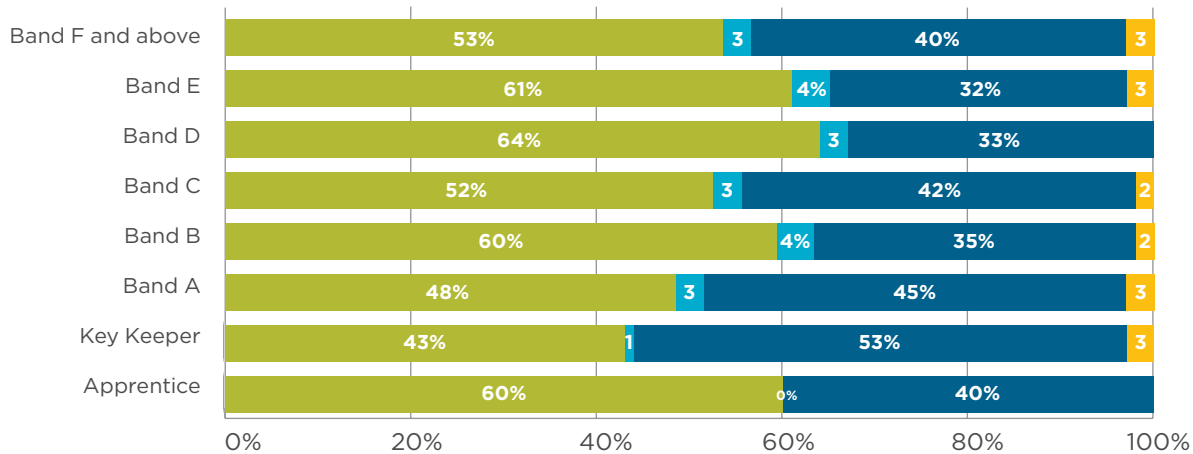


Employee disability and pay band

2021



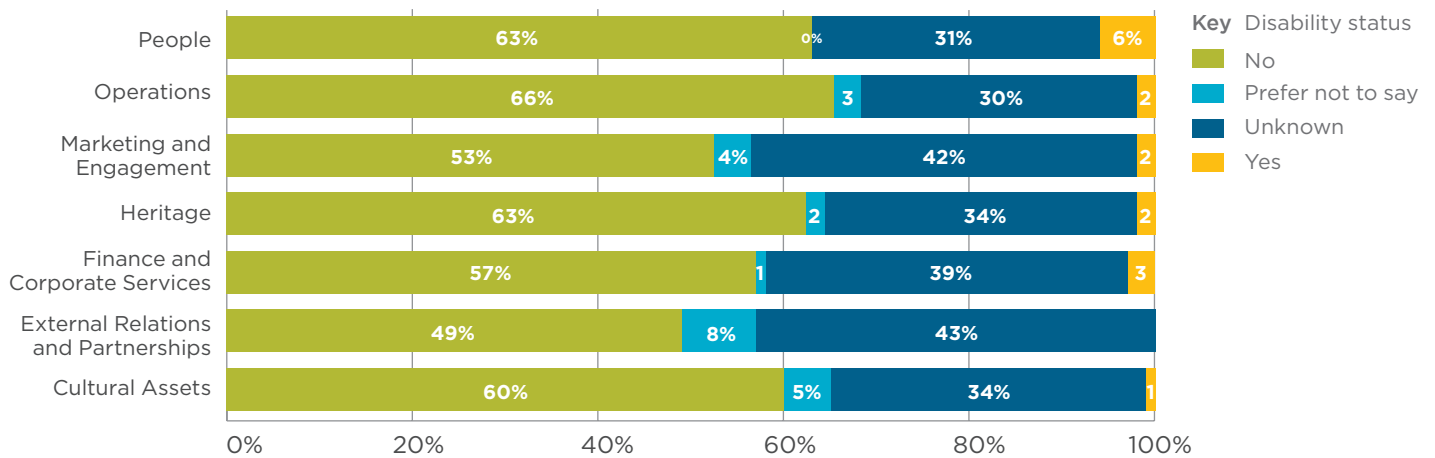
2022



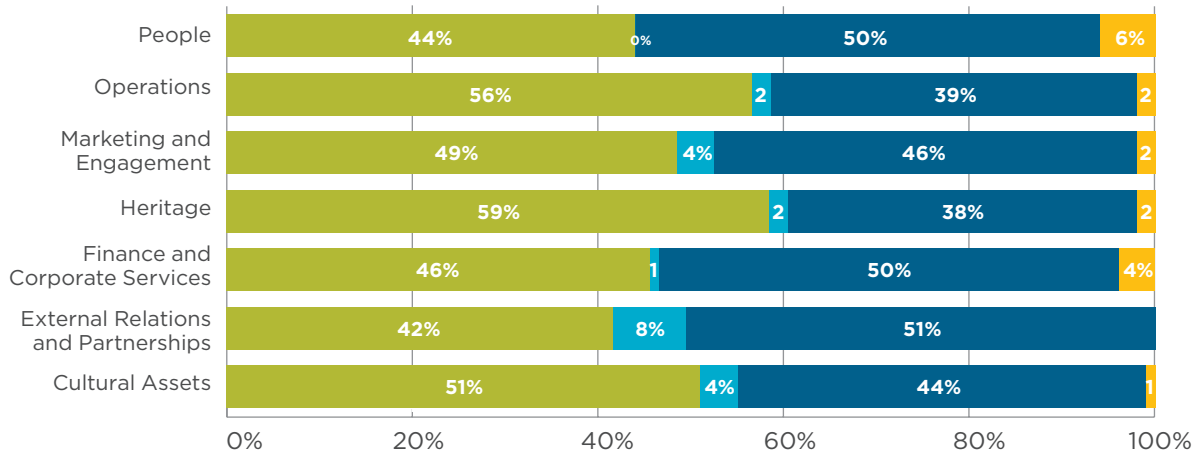
EMPLOYEE DISABILITY PROFILES FOR 2021 AND 2022

Employee disability by directorate

2021



2022



DISABILITY COMMENTARY

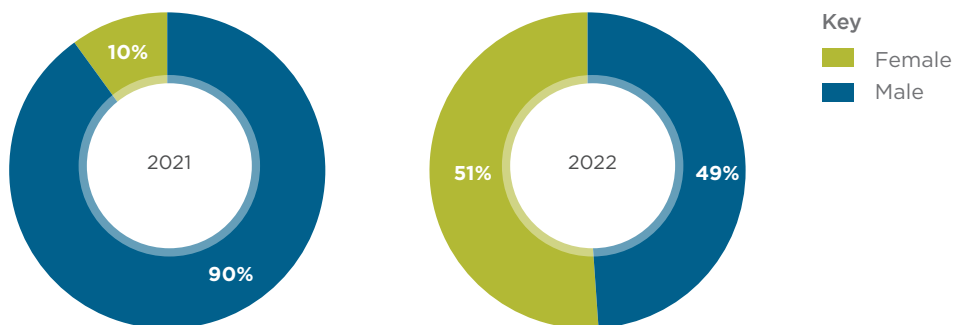
- Colleagues declaring as having a disability remain stable.
- Number of colleagues who have declared has reduced by 9%.
- Disability declaration is the lowest out of all the protected characteristics.
- Disability confident level 2 maintained in 2022.

DISABILITY ACTIONS TO CONSIDER

- Explore options to improve ease of declaration, including during induction process.
- All Directorate recruitment campaigns should be informed by the diversity profile to identify potential for positive targeted action.
- Continue to work with partners on improving attraction and retention for disabled colleagues.
- Demonstrate use of guaranteed interview scheme – potential to add to our internal equality monitoring.
- Demonstrate use of positive action recruitment to training roles.

GENERAL INFORMATION 2021 AND 2022

Promotions



Maternity/Adoption/Shared Parental Leave

Employees on Maternity/Adoption leave as at 31st December 2021	11
Employees on Maternity/Adoption leave as at 31st December 2022	12
A small number of employees took Shared Parental leave in 2021 and 2022 (data suppressed as numbers <10)	*

Grievance and Discipline Report

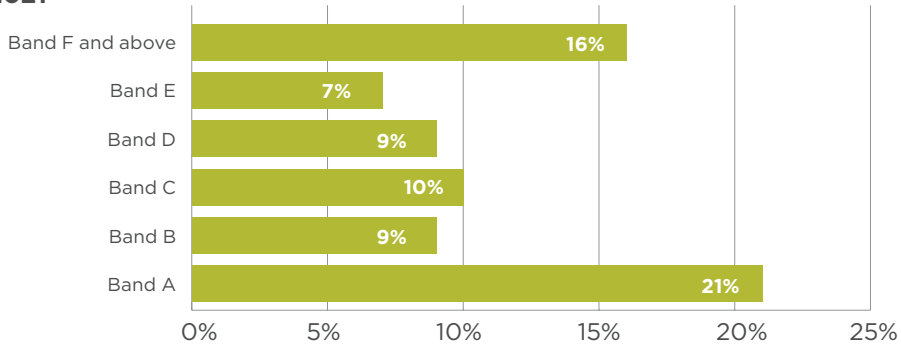
Over 2021 and 2022 there were a small number of formal grievances and disciplinary cases (less than 10) which were managed using the appropriate formal policy and procedure.



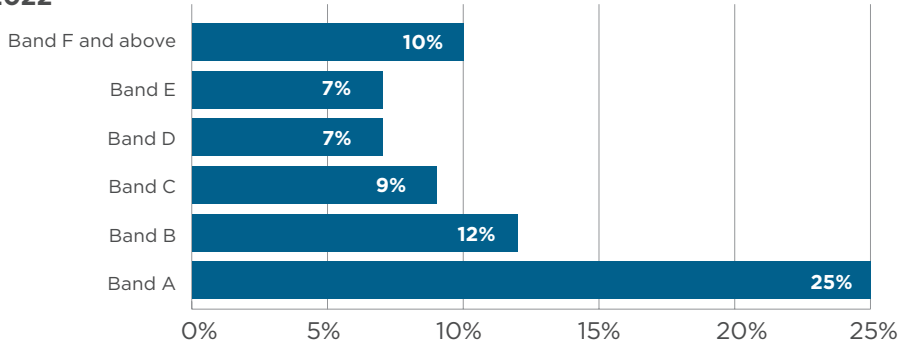
LEAVERS INFORMATION FOR 2021 AND 2022

Leavers by Pay Band

2021

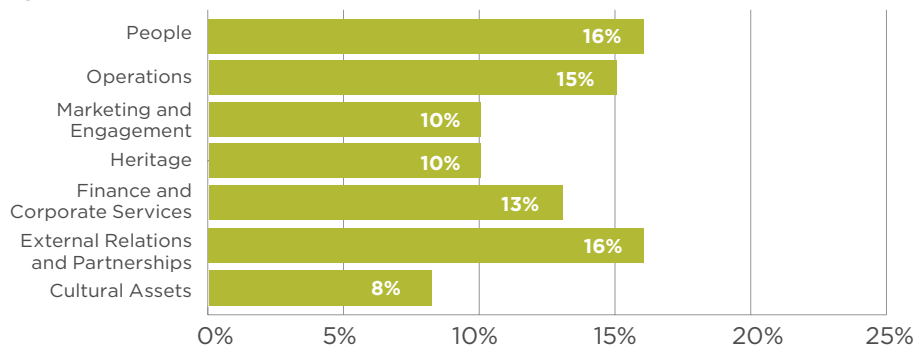


2022

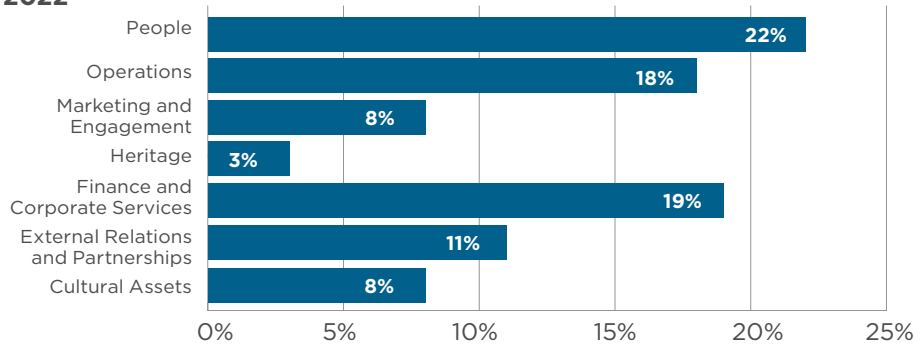


Leavers by Directorate

2021



2022



PAY GAP TABLES

Pay Band	Male		Female		Male/Female	
	Mean	Median	Mean	Median	Mean	Median
Apprentice	10.70	10.74	10.69	10.69	0%	0%
Band A	10.61	10.74	10.60	10.74	0%	0%
Band B	12.69	12.99	12.52	12.99	1%	0%
Band C	15.78	16.91	15.66	15.86	1%	6%
Band D	20.06	20.64	19.80	20.64	1%	0%
Band E	23.91	24.63	23.53	23.74	2%	4%
Band F	28.97	30.22	29.68	30.22	-2%	0%
Band G	36.82	36.82	35.23	36.19	4%	2%
CEO	65.24	65.24			100%	100%
Total	15.17	12.99	15.03	12.99	1%	0%

Pay Band	Disabled		Not Disabled		Disabled/ Not Disabled	
	Mean	Median	Mean	Median	Mean	Median
Apprentice	-	-	-	-	-	-
Band A	10.67	10.74	10.70	10.74	0%	0%
Band B	12.85	12.99	12.77	12.99	1%	0%
Band C	16.91	16.91	16.07	16.91	5%	0%
Band D	20.64	20.64	20.08	20.64	3%	0%
Band E	23.77	23.74	23.77	24.63	0%	-4%
Band F	-	-	-	-	-	-
Band G	-	-	-	-	-	-
CEO	-	-	-	-	-	-
Total	14.88	12.99	15.03	12.99	-1%	0%

Pay Band	Ethnic Minority		White		Ethnic Minority/White	
	Mean	Median	Mean	Median	Mean	Median
Apprentice	-	-	-	-	-	-
Band A	10.53	10.74	10.61	10.74	-1%	0%
Band B	12.55	12.81	12.64	12.99	-1%	-1%
Band C	15.51	15.05	15.71	15.86	-1%	-5%
Band D	17.76	17.76	19.93	20.64	-12%	-16%
Band E	24.00	24.63	23.63	23.74	2%	4%
Band F	30.22	30.22	29.12	30.22	4%	0%
Band G	-	-	-	-	-	-
CEO	-	-	-	-	-	-
Total	15.70	13.31	15.21	12.99	3%	2%

PAY GAP DATA

We report our pay gaps using a single measure, by comparing the average full-time equivalent earnings of different groups of staff (in relation to gender, disability and ethnicity). For example, the full-time gender pay gap compares the mean and median hourly pay, excluding overtime, of men and women working full-time. It is important to note that a pay gap does not necessarily mean a difference in pay for comparable jobs or work of equal value.

GENDER

Mean is -1%;
Median is 0%

- Where men and women are undertaking work of equal value, they are paid a similar hourly rate and consequently the gender pay gap is low, with an overall pay gap of -1% (mean) with no difference in the overall median pay.

DISABILITY

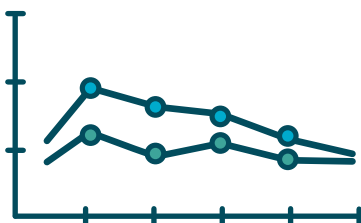
Mean is 1%;
Median is 0%

- Within HES, 58% of the staff have made a declaration of their disability status, with 42% who have chosen not to declare this information. As such the comparison data only includes this 58% and is only available across 5 grades as outlined in the table in previous slide. 2% of staff have declared that they do have a disability. 53% of HES staff have indicated a non disability status.

ETHNICITY

Mean 3%;
Median 2%

- Within HES, 81% of the staff have made a declaration of their ethnicity. As such the comparison data only includes this 81% and is only available across 6 grades as outlined above. 78% of staff who have made a declaration are of a white background, with 2% from other ethnicities, 1% of staff prefer not to disclose. Based on employees who have declared their ethnicity, the pay gap for HES is 2% favourable towards those from a BAME background. It is important to acknowledge that the figures behind this positive calculation are based on low numbers of BAME staff.



THE GENDER PAY GAP IS LOW WITH AN OVERALL PAY GAP OF

-1%

CONCLUSION

The information provided in this report will be used to support and inform our recruitment and employment practice to improve our workforce diversity. We recognise that we are not alone across the public and heritage sectors in this aspiration and it will be increasingly important for us to work in partnership as we promote the historic environment as an employer of choice and training pathway.

Continuing to utilise the new HR management system will enable a greater level of data interrogation in the future. We will continue to encourage our employees to share their personal equality information to reduce the level of unknown data.

We will continue to create partnerships with other organisations to share best practice and continue to improve our practice to improve equality across the organisation.



LEARNING AND DEVELOPMENT

- We continue to offer our colleagues learning and development opportunities to enable them to achieve their potential. Included in the staff training offer within is a number of courses pertinent to customer care and our staff relationship with visitors/customers.
- The following courses have been offered over 2021-22:
 - Information Governance e-learning courses
 - Equality, diversity, and Inclusion e-learning course
 - Exceeding Visitor Expectations New Starts
 - Exceeding Visitor Expectations Refresher
 - Promoting Our Product
 - Till & Compliance
 - Handling Challenging Situations
 - Disability Awareness
 - Measuring our Success
 - QA for a Day Senior Management
 - Telling Our Stories

STAFF BENEFITS

As part of our pay and reward offer to staff, we include a range of benefits listed below which provide discount and favourable purchasing opportunities for staff, access to occupational health and wellbeing services and positive work life balance policies.

- Employee Assistance Programme
- Occupational health
- Health and wellbeing awareness events, activities, and information
- Discounted health plans
- Access to CSSC sports and leisure membership
- Discounted gym memberships (local council and private)
- Competitive pension schemes
- Childcare vouchers
- Contractual sickness absence pay
- Contractual maternity, paternity, adoption, and shared parental leave and pay
- Interest-free loans
- Salary advances for travel season ticket or bike
- Flexible working patterns if appropriate to role
- Career breaks
- Membership to SCRAN
- Discounted mobile phone deals - Vodafone
- Staff pass for free entry to HES properties
- Staff pass allows free entry to English Heritage, Manx and CADW Properties
- 20% discount in HES shops and cafés
- Cycle to Work scheme

ANNEX C – EQUALITY CHAMPIONS GROUP

Name	Directorate
Adam Jackson	External Relations and Partnerships
Craig Fletcher	Marketing and Management
Kate Moore	People
Ryan Kerr	Finance and Corporate Services
Kit Reid	Marketing and Engagement
Iona Matheson	Marketing and Engagement
Kathy Richmond	Cultural Assets
Colin Tennant	Cultural Assets
Gillian MacDonald	Marketing and Engagement
Dara Parsons	Heritage
Christina Kelly	Marketing and Engagement
Clare Torney	Operations
Deeba Ali	People
Ranald MacInnes	Marketing and Engagement
Sean Gallen	People
Susan Hamilton	Heritage
Denise Mattison	Finance and Corporate Services

DIRECTOR SPONSORS

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ALBA

Historic Environment Scotland
Longmore House, Salisbury Place
Edinburgh EH9 1SH

0131 668 8600
historicenvironment.scot

Historic Environment Scotland – Scottish Charity No. SC045925
Registered Address: Longmore House, Salisbury Place, Edinburgh EH9 1SH