

COTAC BUSINESS PLAN 2015–20

SHAPED BY MEMBER PRIORITIES – RESPONDING TO SECTOR NEEDS

As a Charitable Incorporated Organisation (CIO) the structure of the Council on Training in Architectural Conservation (COTAC) will:

- Be shaped by the priorities of our members
- Respond to sector needs



BACKGROUND

COTAC originated in 1959 in response to the need for training resources for practitioners so they could properly specify and oversee work involved in repairing and conserving historic buildings and churches.

Since then COTAC has successfully, persistently and influentially worked to lift educational standards, develop training qualifications and build networks across the conservation, repair and maintenance (CRM) sector, estimated in 2014 at 4.2% of all construction industry activities. This has involved working in partnership with national agencies, professional and standard setting bodies, educational establishments and training interests.

OPERATIONAL INTENTIONS 2015–20

During the 5-year Plan COTAC will:

- Refine its governance and administrative arrangements
- Register with the Charities Commission as a CIO
- Engage with a wide range of interested parties to achieve its objectives
- Re-evaluate and update the job/employment groupings of conservation work activities
- Enhance the COTAC website with digital information
- Update the understandingconservation.org website
- Enable and serve the Edinburgh Group
- Develop an Understanding Conservation School (UCSchool) Group
- Develop a Building Information Modelling for Conservation (BIM4C) Group
- Monitor and engage in standard setting mechanisms
- Pursue an 'enhanced value' approach to capitalise on its ring-fenced educational funds in compliance with the Historic Building Contractors Group funding transfer arrangements
- Maintain its annual conference programme
- Grow its membership base
- Increase and diversify its annual core funding income streams to align with needs and operations
- Prepare project funding bids and/or memorandum of understanding arrangements
- Circulate all meeting minutes to Trustees
- Update its Risk Register
- Develop and implement a communication strategy

COTAC's Delivery Programme 2015 - 2020

2015–2016

- Establish a sustainable administrative infrastructure
- Put a new constitution in place
- Consolidate core membership, benefits etc.
- Deliver a communication/press release strategy
- Update its Risk Register
- Deliver a conference programme and report
- Develop a UCSchool 'awareness of' website
- Publish the 2014 'Fire and Flood' conference report
- Deliver on MoU's with Historic Scotland and OPW (Ireland)

2016–2017

- Extend public profile
- Implement a membership strategy
- Deliver the 2015 conference report
- Develop the COTAC website organisational and presentational sections
- Develop a UCSchool 'skilled in' website
- Digitally archive historic COTAC records
- Extend project-funding bids
- Appoint a Webmaster

2017–2018

- Initiate a COTAC website 'Conservation Course and Materials' sections
- Appoint a Membership Secretary
- Maintain membership targets
- Deliver a 2016 conference programme and report
- Initiate capacity building review of skills matrix
- Prepare project-funding bid and pursue additional support

2018–2019

- Assess additional potential membership growth
- Develop membership to Target Stage 3
- Develop and deliver a conference programme and report
- Initiate technical interpretations for lay audiences
- Prepare project-funding bid and pursue additional support
- Review, progress and draft next 5-year Plan 2020 - 2025

2019–2020

- Assess additional potential membership growth
- Develop membership to Target Stage 4
- Develop and deliver a conference programme and report
- Develop technical interpretations for lay audiences
- Prepare project-funding bid and pursue additional support
- Agree next 5-year plan 2020 - 2025

KEY OBJECTIVES

Driving strategic member benefits:
COTAC will deliver support and influence on behalf of its members across the CRM sector and beyond to:

- **Set standards**
- **Promote conservation education and training, including courses**
- **Generate advocacy**
- **Create digital resources**
- **Publish sector-critical content**
- **Educate through events and networking**

Our **Strategy Group**, including Trustees, top-tier Members and key Partners, will convene every 6 months, to engage with lead Members and inform strategic planning



TARGET AREAS

Activities will focus on:

- **Guidance framework**: Advice will be guided by national and internationally recognised practice standards
- **Skills Matrix and Capacity Building**: Review ICOMOS Education and Training Guidelines criteria against current needs to help shape educational priorities
- **COTAC Website proposals**: Enhance digital information on conservation organisations and courses; downloadable pdf and PowerPoint conservation reports and presentations; building materials information, and support case studies
- **Understanding Conservation Website**: Update and refresh its www.understandingconservation.org site
- **Support the Edinburgh Group**: arrange and support the 6 monthly meetings of the Group, the pan-professional forum enabled and supported by COTAC with the aim of linking across all the individual conservation accreditation initiatives
- **Role of Understanding Conservation (UCSchool) Group**: Enable the voluntary multidisciplinary UCSchool working group with the aim of developing a web-based 'awareness of' approach, whilst enhancing a 'skilled in' conservation sector. Across a broad range of disciplines it will do this through an 'Understanding Conservation School' 'Basic' and 'Advanced' initiative
- **Role of BIM4 Conservation (BIM4C) Group**: Develop a consistency of messaging, support and standards, through the education, training and professional development of both new and existing professionals in their adoption of BIM for conservation.
- **Annual Conference Programme**: Arrange an Annual Conference of at least one-day duration, supported by MoU agreements, sponsorship and fee income
- **Standard Setting**: Engage with relevant Occupational Standard Authorities to assist in reviewing processes of current national conservation and heritage standards

CORPORATE DEVELOPMENT: COTAC'S 4 LAYERS

COTAC's corporate development strategy will focus on best practice, covering:

1. **Membership: Infrastructure and Support**
2. **Communications**
3. **Risk: Structure and Growth**
4. **Resources and Capacity**

MEMBERSHIP

Partner Members Benefits (£500 subscription) Partner Members are key organisations with a high involvement in COTAC helping shape priorities in the context of its wider charity and corporate objects with the opportunity to join our Strategy Group

Ordinary Member Benefits (£150 subscription) Ordinary Members are organisations and/or individuals that seek member benefits and strategic sector support, without the need to directly shape COTAC's strategy.

Network Members Benefits (£50 subscription) Network Members will be organisations and/or individuals seeking the benefits of mutual support and regular contact with the sector.



GROWTH PROJECTIONS

A four-step target during the 2016-2020 period aims to deliver substantial growth by the fifth year of the Plan:

- Achieve 16 additional Partner Members
- Achieve 40 new Ordinary Members
- Achieve 20 new Network Members
- **Target additional Subscription Income/annum at Year 5: £15,000**

Through combining existing subscription income with the additional four step targets, by 2020 COTAC aims to achieve an overall annual subscription income of £18,000.

COMMUNICATION AND PUBLICITY

COTAC will devise a Communication Strategy that builds upon its Constitutional objectives, directed to informing key stakeholders and supporting its members. Three key themes will be articulated, honed and promoted, to focus on:

Standards | Education & Training | Advocacy

RISK

COTAC will annually review and update its Risk Register and establish appropriate and proportionate mitigation to manage or reduce identified risks.

SUMMARY

Resources and Capacity - Infrastructure and Support

Much has been achieved by COTAC already. This will be continued in the future through its current structure as the 'Council' through the voluntary efforts of Trustees, and a small Management core. Project-funding applications will also be devised and submitted during the Plan period to help ensure that the Council's full objectives can be realised.

To fully achieve its Aims and Objectives, COTAC intends to develop a sustainable infrastructure by:

- **Increasing resources and capacity building through enhanced membership subscriptions, MoU Activities and specific Agreements, Capital Project funding and Grant Bid applications**
- **Managing that additional resource to build a sustainable core infrastructure to support COTAC's future as a viable and self-sustaining organisation**