



A review of Cadw's governance arrangements

An independent review undertaken
at the request of the Welsh Ministers.

December 2023

Dolbadarn Castle, Gwynedd.



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Introduction

1.1 The work of Cadw is of great and significant importance to Wales. It conserves, secures, protects and keeps safe many of the things that make us who we are. Most importantly, it promotes public understanding and enjoyment of, and access to, the historic environment of Wales. Cadw provides a vital link to our cultural, historical, inspirational and aesthetic legacies, which in turn nurtures our curiosity, imagination and creativity. Cadw has shown that a properly managed and shared historic environment enhances social and economic well-being. It is no surprise therefore that Cadw is an Internal Agency within Welsh Government. Such agency status means that Cadw is a division of Welsh Government and is accountable to ministers for the operation and management of the organisation and for the delivery of its functions. Although other models are possible and might be explored in the future, Cadw currently has a position which is beneficial in securing the history and heritage of Wales for future generations.

1.2 Cadw means ‘to keep’, and Cadw in its various communications states, ‘Cadw — er lles pawb. For us all, to keep’. Cadw is in effect the Welsh Government’s historic environment service working with us all to help look after the outstanding heritage of Wales.

1.3 Cadw is a major visitor business and has statutory responsibility for conserving and delivering safe public access to 131 of Wales’ historic sites in its care. In addition, Cadw is a regulatory authority, responsible for identifying historic buildings and monuments of national importance that require protection either through listing or scheduling and historic parks and gardens through registration. Cadw oversees the consenting regime for the management of change that affects these historic places and supports the Welsh Ministers in the development of policy and legislation to support the historic environment of Wales.

1.4 In 2022–23, Cadw had 252 people posts (not all occupied), attracted over 1.1 million visitors to its staffed sites, plus a further estimated 1 million visitors to its unstaffed sites. Cadw generated £9.64m of income from its commercial activities and managed a capital budget of approximately £10m for essential conservation of properties in care, improvement of visitor facilities and capital grants to owners of historic properties. It received Welsh Government funding of approximately £9m for revenue support, with a total budget of approximately £28m, all highlighted in the table (Appendix 6.1) and the *Cadw Annual Report 2022–23* (Appendix 6.2). The breadth, scale and complexity of Cadw’s work is not to be underestimated.

1.5 In December 2022, Dawn Bowden MS, Deputy Minister for Arts, Sport and Tourism (DMAST), announced the establishment of a Task and Finish Group (TFG) to ‘Consider Cadw’s current governance arrangements and how effective they are for its operation and the wider provision of public heritage services at a national level across Wales’ (Appendix 6.3). The term ‘public heritage services’ refers, in this context, to the delivery of services relating to the historic environment. This, in effect, is the brief for this review.

1.6 I was asked to establish, lead and chair the TFG and report back to the Deputy Minister later in 2023. It is important to emphasise that this review was not triggered by any significant concerns from Welsh Government or any stakeholder regarding Cadw, and that I was not given any task other than to lead the review on the brief outlined above.

1.7 The scheduling of this review is based upon a commitment given in 2017 when the current Cadw governance model was established. Cadw, like many organisations, is facing considerable challenges in the current economic climate and this point, alongside Cadw’s desire and ambition for continuous improvement, underlines the timeliness of this review.

1.8 I was fortunate to have Jane Richardson, the Chair of the Cadw Board, and Emma Plunkett-Dillon, former Assistant Director of National Trust Wales, alongside me as part of a Coordinating Team. We were assisted by Gwilym Hughes, Head of Cadw, and Christopher Jaynes, Cadw Business Unit Manager. Together, we identified and formed a TFG; their appointment was agreed by the Deputy Minister on 5 April 2023 and announced in a ‘Written Statement’ (Appendix 6.4).

1.9 The TFG was comprised of experts drawn from across the UK whose knowledge and experience were relevant to our brief, along with Cadw staff representatives and trade union representatives (listed in Appendix 6.5).

1.10 This document is the distillation of the work of the TFG with information, views and opinions collected from a wide range of organisations, individuals and, most crucially, the staff and Cadw Board members. It is an independent team effort and I thank all my colleagues for their hard work, commitment and friendship during this review and everyone who helped, supported and contributed to this very focused work. To encourage a sequential study of this short document there is no executive summary.

1.11 I have attempted to approach the review on the principles, definitions, objectives and style contained within the various appendices below. Appendix 6.6 is a suggested definition of governance; Appendix 6.7 sets out the principles guiding our approach and style to the review; and Appendix 6.8 highlights the key objectives of the review. These principles, definitions and objectives were agreed in advance of the TFG undertaking the review by the DMAST, and by the TFG.

1.12 During 2023 I have had the pleasure and privilege of visiting, and in many cases revisiting, numerous historic buildings, monuments and places in Cadw’s care across Wales. I also visited several sites that, while not in the direct care of Cadw, nevertheless enjoyed protection as scheduled monuments and were benefitting from Cadw grants for their active management.

The welcome I received from the Cadw team, and the passion, insight and knowledge that was shared, was both humbling and inspiring. Cadw staff were invited to take part in a survey, which was illuminating — I sincerely thank them all. An external company reviewed all the responses and a summary of the results is provided in Appendix 6.12. It is worth repeating here the statement that they made at the beginning of their report:

‘Cadw staff share a common passion for their work in heritage. They generally respect each other’s skills and enjoy camaraderie. Those in visitor-facing roles enjoy sharing their passion with visitors. There is sense of pride in working for Cadw, knowing that the job makes a real difference.’

I fully endorse that statement. Cadw is, without doubt, a wonderful, high-achieving organisation, which celebrates and reinforces Welsh identity, staffed by wonderful people, and deservedly it is something for us all to cherish and to be proud of.

Roger Lewis
Chair, Cadw Governance Review, December 2023



Pictured are Roger Lewis (left) and Gwilym Hughes, Head of Cadw, at Caernarfon Castle, Gwynedd.

Background and context



2.1 In February 2017, a review of the heritage sector of Wales, entitled *Historic Wales: A roadmap towards Success, Resilience and Sustainability for the Heritage of Wales* (Appendix 6.9) included a proposal that Cadw should become ‘a charitable body or an executive agency outside of Welsh Government’. In response to this proposal, the then minister commissioned a business case to consider the different potential operating models for Cadw. The subsequent *Historic Wales — Cadw Workstream: Business Case for Change* in October 2017 (Appendix 6.10) concluded that the arguments for and against Cadw being inside government were relatively evenly balanced. However, it recommended that Cadw stayed in government, but with a series of business improvements to enable it to operate more effectively. This would essentially give Cadw the status of an ‘Internal Agency’.

2.2 The conclusions of this assessment were considered and agreed by the Welsh Government’s Cabinet in October 2017. It was also agreed that a period of five years would be needed for the new arrangements to become established before a review should take place. The year 2022 heralded the fifth anniversary of this decision and prompted the Deputy Minister to announce in December 2022 that it was time to consider how effective the new business improvements had been in terms of giving Cadw the flexibility that it needs while operating within government.

Above: The non-executive members of the Cadw Board from left to right: Gaynor Legall, Liz Girling, Jane Richardson, Steven Foulston and Peter Wakelin.

2.3 The objective of the *Historic Wales — Cadw Workstream: Business Case for Change* was to allow Cadw as much freedom and flexibility as possible to enable it to fully realise its commercial potential and build on its significant increase in visitor numbers and membership. It considered a wide range of options that could be tested against the status quo of retaining Cadw within government. It recognised that there were potential benefits of moving the organisation to a more arms-length status. However, it also accepted that Cadw had performed well over recent years whilst being in government and that there were major financial, legislative and HR challenges to creating a new arms-length organisation. It also recognised that Cadw’s role of supporting legislative and policy development was better positioned within government.

2.4 The *Historic Wales — Cadw Workstream: Business Case for Change* recommended that Cadw should remain inside Welsh Government but that a number of business improvements should be put in place to facilitate better planning and provide greater flexibility on recruitment within budgets. These improvements would allow Cadw to continue to develop its visitor business and commercial activities as well as support the vital work to manage and protect the heritage of Wales and deliver its legislative and policy responsibilities.

The principal business improvements were:

- To establish an internal Cadw Board, comprising civil servants from the Welsh Government, external expertise and a staff representative.
- To establish a formal system of delegation and internal freedoms, including financial, operational, HR and procurement. These delegations would enable Cadw to have greater operational flexibility while still functioning effectively within Welsh Government’s internal control framework, and with full accountability to Welsh Ministers.
- A two-year budget delegated to the Cadw Board by Welsh Ministers and tied to a three-year business plan. Importantly, this would provide flexibility on recruitment within budgets and could be tied to commercial and income-generating strategies.

2.5 These conclusions were supported by the Welsh Government’s Cabinet in October 2017 and the freedoms listed above were subsequently agreed with the Executive Committee of Welsh Government. An important addition was the appointment of the Director of the Department of Culture, Sport and Tourism (the ‘parent department’ for Cadw) as the Cadw Additional Accounting Officer (AAO). The delegation of certain recruitment decisions would be passed to the Cadw AAO and were linked to commercial income targets and informed by advice provided by the Cadw Board. In this way, the Board would provide assurance to the AAO around the financial management of Cadw and the delivery of its business plan objectives.

2.6 The outbreak of the Covid-19 pandemic in March 2020 had a major impact on the operation of Cadw and these new arrangements. The monuments were temporarily closed to the public and all conservation work, other than essential safety work, was suspended.

2.7 The agreed delegation arrangements were also suspended and have not yet been restored. As is noted below, the continued suspension of these delegations is having an ongoing negative impact on Cadw’s operational effectiveness.

2.8 The Cadw Board was established in late 2018 and met for the first time in early 2019. They continued to meet virtually throughout the Covid pandemic. Board members completed their first full term in 2022. Some have now been appointed to a second term, and additional members have been recruited to bring in further specialist expertise.

2.9 The financial challenges facing Welsh Government and the public sector in Wales have greatly increased over the course of this review and the TFG is mindful of the financial pressures on Cadw. The TFG encourages Cadw to continue to plan long-term in these most difficult of times, ready to implement their considered decisions when the moment arises.

Methodology and approach

3.1 The Coordinating Team met regularly throughout the review process and together, as highlighted, identified a suitably qualified TFG approved by the Deputy Minister. The TFG were asked to declare any interests of potential conflict and an ‘interests’ register was created.

3.2 The TFG met ‘virtually’ on 25 April 2023 and agreed its approach based on a briefing note from the Chair, which outlined points 6.5, 6.6 and 6.7 in the attached appendices below.

3.3 The TFG conducted one-to-one interviews with a range of leaders from relevant institutions and organisations, and with experts and stakeholders from both inside and outside of Wales (they also received written contributions). The TFG also interviewed a number of members of Cadw staff, the Cadw Board and Welsh Government divisions and bodies and relevant Heads of Department. All of those consulted are listed in Appendix 6.11.

3.4 Cadw staff were invited to take part in an online survey (Appendix 6.12).

3.5 The work of the TFG took place between April and October 2023 and the notes and outputs of these meetings were shared with and made available to all members of the TFG via a central database.

3.6 Members of the TFG also reviewed numerous documents relevant to Cadw that have been published over recent years, some of which are highlighted in the Appendix.

3.7 During the review process, the Chair kept the Deputy Minister and the Director of Culture, Sport and Tourism updated on the progress of the review.

3.8 The Chair of the review attended the Cadw staff conference in February 2023 to introduce the review to staff, and attended a face-to-face meeting with the Cadw Board. He interacted with Cadw staff at various sites around Wales where there were plenty of opportunities to have open conversations without senior members of staff present.

3.9 The recommendations are drawn from the copious amounts of evidence and observations from the members of the independent TFG. This document was agreed by the TFG ahead of publication.

Below left: Roger Lewis met with one of Cadw’s Field Monument Wardens at Llangibby Castle, Monmouthshire, a non-Cadw site that benefitted from a Cadw grant in 2022–23.

Below right: Roger Lewis with the Cadwraeth Cymru team at Old Beupre Castle, Vale of Glamorgan.



The King's Gate development at Caernarfon Castle, Gwynedd.



Preface to the recommendations

4.1 The view of the TFG is that Cadw’s mission and purpose is, subject to the points made in the recommendations, best served by remaining, at this moment, as an Internal Agency of Welsh Government, retaining all its functions and responsibilities within a single entity. This opinion resulted not from an explicit request to review Cadw’s status, but from a desire to endorse the position adopted in 2017, subject to the points made in the recommendations of this review being properly considered and implemented as fully as possible.

4.2 The work of the Department of Culture, Sport and Tourism (DCST), with its Director reporting to the Deputy Minister, should be recognised for doing an outstanding job in supporting Cadw in numerous ways, particularly through the Covid pandemic, and helping to address Cadw’s demanding monument maintenance responsibilities. The cross-department synergies and opportunities for Cadw being within the DCST are considerable. Moreover, Cadw’s unique relationship with the public also provides the Welsh Government with opportunities for a different kind of public engagement. Within government Cadw has the opportunity to develop and inform policy which can benefit the whole of Wales’ historic environment, such as agriculture and land use, and planning and regeneration. It can directly align to the national Cymru/ Wales brand, with the potential to help shape as well as draw upon it.

4.3 The Cadw team are to be congratulated for delivering impressively upon its mission and purpose across all of its many and varied areas of responsibility over recent years, particularly during and after the Covid pandemic — highlighted in the *Cadw Annual Report 2022–23* (Appendix 6.2).

4.4 Cadw’s position as an Internal Agency of the Welsh Government provides the financial stability to enable Cadw to weather many unforeseen circumstances and address the considerable challenges facing many organisations today. Such financial stability also allows Cadw to focus on *Programme for Government* priorities and access specialist resources and expertise within government that are not affordable to retain in-house.

4.5 The benefits of being within government are perhaps not felt equally across Cadw. Policy, in an understandably policy-dominated environment, sits well and regulatory functions perform well. However, delivering Cadw’s conservation work is possibly more challenging in this environment and delivering a commercial visitor experience is considered most difficult of all. Opportunities for more innovative work in these areas are inevitably challenging in the current governance environment.

4.6 It is felt that Cadw, with such an important mission and purpose, has the potential to deliver even greater benefits for Wales and beyond. The challenges within the current governance structure are not stopping it from operating but are holding it back from realising all the potential opportunities for growth.

4.7 The 2017 report — *Historic Wales — Cadw Workstream: Business Case for Change* (Appendix 6.10) — recognised the same growth potential and put forward a set of recommendations designed to drive the change needed to realise this potential. The Covid pandemic, without doubt, severely disrupted the change programme and the 2017 report recommendations have understandably not been fully implemented. There is now an opportunity to reset the programme for change.

4.8 The desire and recognition for change from the majority of those involved in the review should not be underestimated. The passion of the comments, views and opinions should be considered in a very positive light as they are motivated by the great work Cadw has already delivered and which Cadw will continue to deliver for future generations.

Delivering Cadw's conservation work and a commercial visitor experience are two areas that present challenges given Cadw's position of being within government.

Below: A Cadw stonemason at work.

Bottom: The retail space at Caernarfon Castle, Gwynedd.

4.9 At the heart of the 2023 review, the TFG is recommending the following headline actions which have the potential to enhance Cadw's performance. The actions are structured around the following themes:

Theme A — Creating greater agility, flexibility and dynamism for Cadw through the return of agreed delegated authorities to the Cadw Senior Executive Team (SET), whilst remaining as an Internal Agency of Welsh Government.

Theme B — Clarifying the role of the Cadw Board and for the Board to develop a closer and direct relationship with the DMAST alongside the Director of DCST, or with the minister and department responsible for Cadw in the future. (To note, we recommend Cadw remaining within the DCST.)

Theme C — Focussing on people and modifying Welsh Government processes and procedures where they relate to Cadw, particularly regarding HR, procurement and the recruitment, promotion and retention of staff. Ensure the processes and procedures are appropriate to the work, the skill of the staff and the particular issues and challenges facing Cadw. Most importantly, ensure that actions are delivered in a timely manner.

Theme D — Reinforcing partnerships which support Cadw's role in the wider heritage sector and services through closer relationships with cultural, creative, historic and visitor organisations across Wales and the UK.

Theme E — Enhancing some of Cadw's wide-ranging activities to assist its core purpose, including building on Cadw's commercial work as a significant visitor attraction and commercial enterprise, and its role as a keeper and promotor of the historic heritage of Wales.

Theme F — To support Cadw being for all people and embracing a modern Wales through its work and practices.

4.10 The timetable for actioning the recommendations, to be approved by the DMCST, will require careful planning and scheduling and possible further work in certain areas. The following list is not in chronological order for action, but it is suggested that the following ten recommendations are of high priority: 5.1; 5.2; 5.3; 5.4; 5.7; 5.8; 5.10; 5.11; 5.12; and 5.18.

4.11 Eight of the recommendations (5.13; 5.14; 5.15; 5.16; 5.20; 5.24; 5.28 and 5.29) may be considered as not directly governance-related but have been clearly identified and retained as it was felt important to capture them in this review. The definition of governance in Appendix 6.6 is sufficiently broad to address such concerns.



Recommendations

Theme A — Creating greater agility, flexibility and dynamism for Cadw through the return of agreed delegated authorities to the Cadw Senior Executive Team (SET), whilst remaining as an Internal Agency of Welsh Government.

5.1 Recommendation 1

The Board of Cadw, the Head of Cadw and the Director of DCST should meet to consider the recommendations and implications of this review. They should agree a timetable for their implementation, identify who is responsible for implementing each action, and propose a course of action to the DMCST. Following this review and feedback from the DMCST, the TFG would welcome a brief note on what has been agreed.

As part of this process, the 2017 report, *Historic Wales — Cadw Workstream: Business Case for Change* (Appendix 6.10), should be considered alongside this review as it contains a number of thought-provoking points worthy of future consideration, but mindful of the current economic climate.

A specific budget should be agreed in terms of the additional staff and funding required to take forward the recommendations of this review. This will need to be in addition to the existing budget required for Cadw to deliver its many core functions and agreed business plan, whilst considering the pressures on the public purse.

5.2 Recommendation 2

The role of the AAO for Cadw, which was suspended early during the Covid pandemic, should be restored, including the delegation of appropriate staffing and recruitment decisions linked to commercial income targets and informed by advice and oversight from the Cadw Board.

It is felt that this role should be held directly by the Head of Cadw who has day-to-day operational responsibility and essentially performs the senior executive role. To reflect this, the title of Chief Executive Officer instead of Head of Cadw should be considered, as was the case in the recent past.

The Head of Cadw/Chief Executive Officer should continue to report to the Director of DCST to retain the synergies and close working relationship with the wider DCST. This arrangement would facilitate the delegation of appropriate, significant and clearly defined financial, staffing, procurement and recruitment authority levels to the Head of Cadw to enable greater agility, flexibility, streamlined decision-making and speed of delivery for the Cadw SET.

As well as reporting to the Director of DCST, the Head of Cadw should be scrutinized and challenged at an appropriate strategic level by the Cadw Board. This recommendation will require specialist advice and guidance from Welsh Government officials to ensure it can be implemented effectively.

5.3 Recommendation 3

The Board of Cadw, the Cadw SET and the Director of DCST should meet with the appropriate Welsh Government governance team and request to revisit the current *Cadw Internal Agency Framework Document, 2017*. They should create a new document which clearly defines the proposed new collaborative relationship between the Cadw Board, the Cadw SET and the DCST. (Examples of helpful documents exist within Welsh Government such as the delegated recruitment arrangements for Healthcare Inspectorate Wales and Care Inspectorate Wales.)

The new document should clearly outline the decision-making processes, responsibilities and authority levels in relation to the Board, Cadw AAO, Cadw SET and Welsh Government officials and ministers. There is a need and a considerable benefit to clearly delegating to Cadw several areas outlined in these recommendations which will enable Cadw to be a more flexible and agile organisation.



Llys Rhosyr on Anglesey, the royal court of the Welsh princes of Gwynedd, was the 131st monument to come into Cadw's care in 2023.

Theme B — Clarifying the role of the Cadw Board and for the Board to develop a closer and direct relationship with the DMAST alongside the Director of DCST, or with the minister and department responsible for Cadw in the future.

5.4 Recommendation 4

The Board of Cadw (represented by the Cadw Chair), the Director of DCST and the Head of Cadw should meet twice a year with the DMCST, similar to the process adopted by Welsh Government arms-length bodies. They should discuss and review Cadw priorities, alongside the agreed annual business plan, and highlight any points and concerns the Board may have. This process should be included in the new *Cadw Internal Agency Framework Document*.

5.5 Recommendation 5

The Cadw Board should undertake a Cadw Board Effectiveness Review/Reaffirmation in the light of this governance review. This should be led by an independent facilitator to ensure that the Board's skills, lived experiences, practices and procedures reflect the work required of it, and its membership is representative of a modern and diverse Wales. The Director of DCST should lead on scrutinising this work and the results of this exercise should be reflected in the new *Cadw Internal Agency Framework Document*.

A Board succession plan should be developed and this exercise should be rolling to take account of any unforeseen Board changes. The Seven Principles of Public Life (also known as the Nolan Principles) is at the heart of Board practice: selflessness, integrity, objectivity, accountability, openness, honesty and leadership.

5.6 Recommendation 6

The Cadw Board should nominate one of its members to be the Vice-Chair as a safeguard, who, if required, can act as a go-between the Chair, Board and Chief Executive Officer if any conflicted concerns of Board governance arise.

During this review, the Chair of Cadw, also a member of the review Coordinating Team and TFG, stepped down to take up a new public appointment. The appointment of a new Cadw Chair should be considered in the context of the review's recommendations.

Top: A young visitor making the most of the Augmented Reality experience at Raglan Castle, Monmouthshire.

Bottom: A series of Welsh language resources produced by Cadw enables Welsh language learners to practise their skills at Cadw sites.

5.7 Recommendation 7

The role of the Cadw Board should be reviewed and potentially redefined. The Board of Cadw, with its expertise and insight, could take on a more strategic as well as advisory role, working with the Director of DCST and Cadw SET to challenge, scrutinise and support, in equal measure, all aspects of Cadw strategy in the context of the proposed revised *Cadw Internal Agency Framework Document*.

This recommended new role for the Board should include:

- Opportunities for the Board to make recommendations to Welsh Ministers, in partnership with the Cadw SET.
- Help shape all aspects of Cadw strategy, including Cadw's wider strategic leadership role within the historic environment sector, within agreed parameters.
- Ensure that the Director of DCST and DMAST are alerted to all issues impacting on the ability of Cadw to best fulfil its purpose.



Historically authentic costumes are made by the volunteers at Plas Mawr Town House in Conwy.



Theme C — Focussing on people and modifying Welsh Government processes and procedures where they relate to Cadw, particularly regarding HR, procurement and the recruitment, promotion and retention of staff. Ensure the processes and procedures are appropriate to the work, the skill of the staff and the particular issues and challenges facing Cadw. Most importantly, ensure that actions are delivered in a timely manner.

5.8 Recommendation 8

The Cadw Board, Head of Cadw and the Cadw SET should put in a request to the Welsh Government HR Director that a senior strategic HR person is seconded to support and advise them on the various HR and associated staff-related processes and procedural changes that are recommended to enable a more dynamic, public-facing, commercially active and specialist skill-based organisation to function more efficiently and effectively.

5.9 Recommendation 9

An assessment should be undertaken of how the current Welsh Government recruitment and promotion processes might be better adapted to suit the needs of Cadw, giving due recognition to the principles of equality and fair process. The HR arrangements currently in place for the Welsh Government inspectorates provide a tried and tested template that could be adapted for Cadw.

5.10 Recommendation 10

Specifically, Cadw should be given delegated authority to recruit, appoint, promote and retain staff, within agreed budgets and HR protocols. Cadw staff have very unusual skill sets and responsibilities in a Welsh Government context, including their commercial and conservation remits and various operational work.

The issues surrounding Cadw staff recruitment, promotion and retention, as well as the ability to appoint emergency cover, requires particular attention. Cadw should be given delegated authority to hire emergency cover, within agreed budgets and HR protocols.

5.11 Recommendation 11

The recruitment delegations detailed in the *Cadw Internal Agency Framework Document*, 2017 should be re-established in conjunction with recommendation 2.

5.12 Recommendation 12

Cadw SET, with specialist government HR and legal advice, should explore an ‘in-house exemption’ model for Cadwraeth Cymru. The Cadw Properties in Care team (of which Cadwraeth Cymru are part) are the in-house conservation team which provides specialist services to exacting standards. Their work is sometimes supplemented by specialist external heritage contractors.

The staff within Cadwraeth are hands-on, technical craftspeople who have very little in common with the wider civil-service ways of working. There may well be the opportunity for Cadwraeth, with appropriate resources, to undertake work for other organisations, which could generate income and, in turn, encourage recruitment and retention and enable critical conservation work to be achieved in a timelier fashion. This could also help the recruitment of apprentices and support the heritage skills agenda.

The ‘in-house exemption’ model could be considered for other aspects of Cadw’s operational roles, such as its commercial activities, which include catering and membership administration, currently undertaken by third-party contractors.



Opposite: The staff within Cadwraeth Cymru, Cadw’s in-house conservation team, are hands-on technical craftspeople and include joiners and stonemasons.



A custodian at Tretower Court and Castle, Powys, introducing a visitor to an audio tour of the site.

Not directly governance-related

5.13 Recommendation 13

The Head of Cadw, Cadw SET, Cadw Trade Union and staff representatives, assisted by HR expertise, should use the opportunity that this review provides to ensure that Cadw is appropriately staffed at the appropriate levels and grades with the relevant skills to fulfil its mission and purpose. An evaluation of the Welsh Government grading system/pathways in terms of its fit to the needs of Cadw should take place. A bespoke grading structure reflecting the unique operational roles within Cadw, such as custodians and stonemasons, should be considered if civil service rules allow.

This review of staffing should ensure that all the various branches of Cadw have the appropriate balanced resource to be able to have time to be strategic, as well as operational, particularly in Cadw's historic environment areas. Any proposed changes should go to the Cadw Board for challenge, scrutiny and support, ahead of being presented internally to the Director of the DCST for agreed action.

It is also recommended that a specifically recognised Head of HR/HR business partner role should be created within the Cadw SET structure given the number of people Cadw employs.

5.14 Recommendation 14

Cadw SET should explore, with other like-minded Welsh heritage bodies, further education bodies and the private sector, the possibility of establishing a 'Welsh School of Heritage and Conservation Skills and Craft Excellence' in partnership with a Wales-based educational institution, with the ability to award recognised qualifications. A particular focus on the use of traditional and low-carbon material is suggested.

This ground-breaking initiative could create the next generation of specialist heritage craftspeople. The many and varied aspects around the governance of such an initiative will need careful management.

5.15 Recommendation 15

Cadw SET, with expert advice and in partnership with the wider heritage and higher education sector, should develop and implement an effective, funded and viable apprenticeships scheme particularly, but not exclusively, for masons — in conjunction with recommendation 14.

Under this model apprentices' roles must be supplementary (i.e. in excess of core headcount), subject to open, competitive recruitment, aligned with apprentice qualification standards and designed to meet skill shortage requirements within the sector.

5.16 Recommendation 16

The current vetting system for volunteers should be simplified to assist volunteer recruitment and retention, mindful of the necessary regulatory framework required. Cadw has made great strides in developing its volunteer offer in recent years and additional resources should be deployed to develop and grow the Cadw volunteer offer across all Cadw sites with an appropriate Cadw person specifically responsible for volunteers.

The specific HR issues for Cadw volunteers requires careful attention and discussion between Welsh Government HR and Cadw SET. The opportunity to develop a new relationship with volunteers across Wales has considerable benefits for all. The experiences and learning from other organisations, such as the Commonwealth War Graves Commission which runs a volunteering scheme for the maintenance of war graves, should be sought. The relationship with volunteers can be potentially complex in a Cadw/Welsh Government governance context.



Opposite: A volunteer interacting with a visitor at Castell Coch, Cardiff.

Theme D — Reinforcing partnerships which support Cadw’s role in the wider heritage sector and services through closer relationships with cultural, creative, historic and visitor organisations across Wales and the UK.

5.17 Recommendation 17

The Historic Wales Partnership — comprising of National Library Wales, Royal Commission on the Ancient and Historical Monuments of Wales (RCAHMW), Amgueddfa Cymru and Cadw — should be reset to encourage even closer collaboration, sharing of knowledge and expertise in areas of common interests, and to explore even greater synergies between Wales’ nationally funded culture and heritage bodies.

It is felt that there are further opportunities for the national institutions to work more closely together and collaborate at a local level, particularly where they have a shared interest in engaging with specific places and encouraging the participation of local communities in their heritage.

The TFG believes that the potential opportunities around a real ‘team’ approach are considerable and that Cadw is well-positioned to take a lead here, a view shared by the majority of members of the Historic Wales Partnership.

It is also recommended that Visit Wales should be invited to attend this meeting on a regular basis. It was also felt that using this partnership to enhance the existing relationships with Creative Wales and Arts Council Wales may well have benefits for all concerned.

The Director of DCST is best-placed to chair this Partnership. The respective Chairs of the four national bodies may wish to meet on a regular basis to share their experiences and report back to their own boards and executive.

5.18 Recommendation 18

A review of the relationship between Cadw and the RCAHMW, if acceptable to all parties, should be undertaken by both organisations working together. Approximately eight to nine years ago, both organisations explored potential synergies of closer working. Since then, as evidenced in this review, the strategic context has changed and it would be timely for both organisations to explore options for developing the potential synergies that exist between them in meeting their shared responsibilities and obligations to protect, record and enhance public understanding of the historic environment.

Above: The Scott memorial clock tower, a listed building in Roath Park, Cardiff.

5.19 Recommendation 19



The 22 Local Authorities in Wales are key to the sustainable management of the historic environment. Cadw has a direct and, in some cases, a close relationship with them. A new structured process for regularly engaging with the Authorities should be put in place, possibly via the Welsh Local Government Association (WLGA), in areas such as designation, research, outreach and public education. Cadw might also revisit its powers of delegation, particularly in areas such as listed building

consents, which will rationalise resources. Such a new relationship should bring significant benefits for all.

Not directly governance-related

5.20 Recommendation 20

The Historic Wales Partnership should collectively develop a specific cultural tourism strategy for Wales. This recommendation should be discussed and explored with Visit Wales and other related agencies and organisations, including Arts Council Wales and Creative Wales, to consider how we welcome more visitors to Wales who are drawn to us by our many and varied cultural offerings.

Such a strategy could and should embrace many other cultural organisations across Wales. To incentivise and reward great ideas which deliver great results, the DCST may wish to consider, when finances allow, setting up a specific cultural tourism fund, with grants to be awarded to the best ideas which deliver the best visitor results.

Theme E — Enhancing some of Cadw’s wide-ranging activities to assist its core purpose, including building on Cadw’s commercial work as a significant visitor attraction and commercial enterprise, and its role as a keeper and promotor of the historic heritage of Wales.

5.21 Recommendation 21

Cadw SET should undertake a complete, fundamental and radical root and branch review of all its commercial activities, including its staff skills, staff resource levels and relationships with external partners, in the context of the recommendations in this governance review, which should allow Cadw greater flexibility.

It is important to emphasise Cadw’s purpose, outlined in its annual report (Appendix 6.2, page 5). Cadw does not exist to be a commercial operation and so any commercial activity must enhance and support its core purpose.

Cadw’s commercial activities should embrace the Welsh Government’s Economic Action Plan, in particular its focus upon the Welsh foundational economy. Cadw is well placed to promote and support the sourcing and selling of Welsh foods and produce, and all manner of Welsh-made products.

In the light of this potential new freedom, Cadw should review and/or reaffirm its short, mid- and long-term commercial strategy to ensure that its potential for further growth of its visitor business and all other income streams is fully developed.

A ‘Head of Visitor Experience and Business Development’ should be created within the Cadw SET structure, and this person should lead the commercial review. This role should be recognised as having equal status with the heads of the regulatory and conservation branches of Cadw.

5.22 Recommendation 22

Cadw SET should be allowed greater freedoms and flexibility in all aspects of the press, PR, marketing and website activities of Cadw. The relationship between Cadw and the Welsh Government teams responsible for this area is strong. However, this recommendation will significantly enhance Cadw’s ability to promote itself in a more immediate and dynamic fashion. Confidence should be placed in the judgement of the Cadw SET that they do not contradict Welsh Government-related policies in the public domain.

An expanded Cadw Marketing and Communications team should be considered, reporting to the Head of Cadw but continuing to work in partnership with the relevant Welsh Government teams.

The Cadw SET should devise a tailor-made Cadw Marketing and Communications strategy for the coming years that is reviewed on a regular basis and aligned with Welsh Government strategies and other relevant Welsh Government organisations.

Below: The outside seating space of the cafe at Harlech Castle, Gwynedd, one of five cafes at Cadw monuments.



5.23 Recommendation 23

The Cadw Board and Cadw SET should revisit, with expert advice, the potential benefits of creating a stand-alone, arms-length, charitable vehicle, which may benefit Cadw through its ability to directly apply for and receive monies, grants, bequeathed gifts etc which may not be possible for Cadw as an Internal Government Agency.

Not directly governance-related

5.24 Recommendation 24

The Cadw Board and Cadw SET should review its survey programmes on a regular basis to re-address priorities. Cadw has contributed significantly to our understanding of how archaeology and historic buildings are essential to the identity and culture of Wales. Inspirational survey programmes have been, and continue to be, core to this understanding. It is noted that Cadw has completed major surveys of historic buildings and archaeological sites, identifying those that require legal protection.

However, it can be difficult for management and protection measures to keep pace with the increase in knowledge, especially when there are many and varied demands on the available resources. As a result, it was felt by some members of the TFG that the deficit between what is known and what is actively managed and protected might increase and, in Wales, this gap is widening.

Our ambitions for the historic environment, some of which were included in the *Priorities for the Historic Environment of Wales, 2018* (Appendix 6.12), should be more securely embedded within the framework of the Well-being of Future Generations (Wales) Act, 2015. Properly managed and protected special places should be seen as something to celebrate, enjoy and share.

Identifying the resources (both people and money) for this essential work will be a challenge and the exploration of synergies with RCAHMW recommended in paragraph 5.18 above should be considered in this context.

Top: Our Lady Star of the Sea & St Winefride, Amlwch, Anglesey, formed part of a listing survey programme of Catholic churches undertaken in recent years.

Right: AA Telephone Box 161, on the A40 between Crickhowell and Tretower, is one of the most recent and unusual monuments to be listed by Cadw.



5.25 Recommendation 25

The Cadw Board should nominate at least one of its members to be a champion for Equality, Diversity and Inclusion (EDI), working closely with the Head of Cadw. EDI should be a standing agenda item for the Cadw Board, particularly in relation to the Equalities Act 2010 and a commitment to the nine protected characteristics.

The challenges facing Cadw in its recruitment of a more diverse workforce are shared by many in the heritage sector and this issue, alongside how Cadw engages with diverse groups, should be the first item for an EDI discussion by the Board. Discussions should be supported by Welsh Government HR and informed by people with lived experience on these matters. The Board should make specific recommendations to the DMCST on how Cadw will address these points.

Cadw should celebrate its commitment to diversity through its fair processes. This should include the recognition that Cadw's assets belong to all, including those communities who may well be marginalised.

5.26 Recommendation 26

The Cadw SET should meet with the Welsh Language Commissioner, supported by Welsh Government HR, in the context of our definition of governance, to review and refine Cadw's action plan on the recruitment of more Welsh-language speaking staff, particularly public-facing staff.

Discussions should be based on a supportive understanding of the challenges Cadw has faced — and which the sector in general is facing in this area — and the work Cadw is already undertaking.

5.27 Recommendation 27

The Cadw SET should develop and enhance its current relationship with the Future Generations Commissioner for Wales with regular meetings to ensure not only that Cadw is fulfilling its responsibilities under the Well-being of Future Generations (Wales) Act 2015, but to positively explore what else Cadw can do to deliver even more upon the Act's goals for the people of Wales.

The Cadw Board will scrutinise and support this strategic work. The opportunities are considerable, such as supporting a 'Healthier Wales' by identifying certain Cadw sites which can create health and well-being spaces and environments.

The Cadw SET wish to adopt a similar approach to the Children's Commissioner and the Older People's Commissioner for Wales.

Not directly governance-related

5.28 Recommendation 28

The Cadw Board and Cadw SET should work with external partners and expert advisors with lived experience of disability, in the context of the review's definition of governance, to understand and to then address the issues surrounding their experiences as they relate to Cadw.

This work will probably involve an audit and review of disability access to Cadw sites, including Cadw's understanding of, and engagement with, disability requirements. A Cadw disability Board champion should be identified to review the potential recruitment of disabled staff and volunteers, guided by an awareness of the Social Model of Disability and all relevant legal requirements, specifically on service provision and employment.

It is recognised that Cadw is mindful of this issue and has undertaken certain initiatives, but all acknowledge that there is still a need to do more. The output of this work should contribute to the Audience Development Plan which Cadw is preparing, based upon strategies that use wide-ranging methods to engage diverse visitors both physically and remotely. The inclusive use of language and communications are vital in this regard, including British Sign Language and Easy Read principles where possible.

5.29 Recommendation 29

The Cadw public membership of almost 60,000 and growing (in effect, the voice of Cadw's passionate supporters) should continue to be actively explored by the Cadw SET to understand how this unique relationship can be further developed and enhanced.

The benefits of this relationship should not only continue to help inform the Cadw visitor experience but also provide a sounding board for Cadw and for the Welsh Ministers in many aspects of the work of the wider historic environment and cultural sectors. The views and insights of Cadw members may result in possible governance discussions on how Cadw engages with the wider public.



A family exploring
St Davids Bishop's Palace,
Pembrokeshire.

Appendices 1–14

6.1 Appendix 1 — Cadw organisational data at the time the current governance model was established in 2017 compared to the most recent figures for 2022–23.

Activity	2016–17	2022–23
No. of posts	249	252
Total revenue income of which commercial income is	£14.3m £6.7m	£18.1m £9.6m
% of revenue income generated by Cadw	47%	53%
Capital budget	£3.26m	£10m
Annual visitors to staffed sites	c. 1.4m	1.14m
No. of Cadw members	18,500	53,000
No. of properties	129 (29 staffed)	131
No. of specialist conservation craftspeople employed	32	23
Consultations on planning applications	622	1,618
Consultations on listed building consent applications	529	388
Scheduled monument consent applications	94	147
Other consultations	170	409
No. listed buildings	29,935	30,064
No. scheduled monuments	4,182	4,227

6.2 Appendix 2 — [Cadw Annual Report 2022–23](#)

6.3 Appendix 3 — [DMAST Statement: Welsh Government review of Cadw to be led by Roger Lewis](#)

6.4 Appendix 4 — [DMAST Written Statement: Update on the review of Cadw’s governance](#)

Coordinating Team

6.5.1 Roger Lewis (Chair)

Roger Lewis has chaired a variety of organisations, including the Cardiff Capital Region, Cardiff Airport, The ‘Yes for Wales’ Referendum Campaign, The Music and Dance School Scheme for UK Government, Racecourse Media Group, and the Royal Liverpool Philharmonic Orchestra. He was also a member of the UK Government Cabinet Office Group to advise on the Platinum Jubilee Civic Honours, Wales Board Member for Festival UK 2022, and President of National Museum Wales. He has held senior executive positions at the BBC, ITV, EMI, Decca, Classic FM and the WRU. Roger Lewis holds honorary doctorates from the Universities of Nottingham and South Wales, Fellowships from Cardiff University and the Royal Welsh College of Music and Drama, is an Honorary Member of the Royal College of Music and a Fellow of the Royal Society of Arts.

6.5.2 Jane Richardson

At the time of the review, Jane was Chair of the Board of Cadw and ran her own consultancy providing strategic services to the culture and heritage sector. She enjoys helping organisations to improve performance and explore new opportunities. Until early 2023 she was Strategic Director for Economy & Place with Conwy County Borough Council where she had responsibility for services ranging from environment and housing to economic development and leisure. She led a number of high-profile infrastructure projects within the county including the creation of the new Culture Centre in Conwy and the transformation of the waterfront at Colwyn Bay. Jane was closely involved in securing a £240m Growth Deal for north Wales and Chaired the Portfolio Board that oversees its implementation.

Before joining the council, Jane was a Director at Visit Wales, leading on all tourism product development across Wales including major investments in new attractions such as Zipworld and the Royal Mint. She spent 10 years working with the National Trust in a variety of roles. She was part of a small team which turned around the Trust’s £2.6m annual operating deficit in Wales within two years. She has managed visitor attractions including Plas Newydd on Anglesey where she increased visitor numbers by over 50% and delivered the property’s first operating profit in its 30-year history. She began her career in broadcasting and still has a particular interest in marketing and communications. As the review was nearing completion, she was appointed as CEO of Amgueddfa Cymru.

6.5.3 Dr Emma Plunkett-Dillon

Assistant Director for National Trust Wales (Consultancy) until retirement in 2019. Emma had responsibility for a broad team of conservation professionals ranging across land, buildings, energy, archaeology and nature conservation. She led several landscape-scale projects including restoration of the Upper Conwy Catchment and delivered the Trust’s ambitious renewable energy project. Her responsibilities included external environmental policy, both natural and historic. She represented the Trust on several Welsh Government boards including the Historic Environment Group. Beyond Wales, she led the Trust’s coastal adaptation panel, and was part of the team that expanded the renewable energy programme and contributed to Farming for Nature initiatives. As Assistant Director she established an internal consultancy and supported the Director with a Wales-wide restructuring.

Prior to this she was a senior archaeologist working for the National Trust, line-managing archaeologists in the Midlands and south-west England as well as Wales.

Her wider experience includes chairmanship of the Council for British Archaeology Wales, Trustee of the Council for British Archaeology (UK), membership of the management committee of Wales Environment Link, and membership of the Ancient Monuments Board Wales. Emma is currently Trustee and Vice Chair of the Dyfed Archaeological Trust.

Below: A visitor and his companion at St Davids Bishop’s Palace, Pembrokeshire.



Task & Finish Group members

6.5.4 Martin Cherry

Martin Cherry taught history at various universities before moving into the field of historic buildings conservation policy. He was Head of Listing and Research Director at English Heritage until 2005. He worked as a Council of Europe expert consultant for over ten years and was until 2016 one of the international members for the Commission to Preserve National Monuments in Bosnia and Herzegovina. He has published in the fields of medieval studies, Victorian architecture, traditional buildings and conservation policy. He was President of the Vernacular Architecture Group between 2014 and 2017. He is a trustee of 'Discovering Old Welsh Houses' and 'Historic Buildings & Places' (formerly the AMS) and is a Fellow of the Society of Antiquaries of London.

6.5.5 Henry Owen-John

Henry Owen-John works part time as an independent heritage management adviser. He became interested in archaeology in his teens and at the Glamorgan-Gwent Archaeological Trust helped develop advisory services to local planning authorities, as well as carrying out field projects. He worked in various capacities for what is now Historic England, including Regional Director for the North-West and Head of World Heritage, providing advice to the UK Government. Henry served on the Royal Commission on the Ancient and Historical Monuments of Wales and was awarded an OBE for services to heritage protection in 2020.

6.5.6 Nicola Andrews

Nicola is the Palaces Director for Historic Royal Palaces, with responsibility for Hampton Court Palace, Kensington Palace, Hillsborough Castle and Gardens, The Banqueting House and Kew Palace (including Queen Charlotte's Cottage, the Royal Kitchens and the Great Pagoda – all within the grounds of the Royal Botanic Gardens, Kew). She is responsible for operations across all of these sites, as well as for the management and maintenance of the palaces and their grounds and estates, and the functions and events held there. She is also responsible for ensuring there is an integrated plan for each palace showing how each will be contributing to HRP's strategy.

Nicola joined Historic Royal Palaces in 2018 after 23 years' experience gained at the National Trust. She worked in a wide range of departments over that time, including operations, external affairs, conservation, HR and finance. Most recently, she held the role of Central Operations and Consultancy Director, with responsibility for leading delivery of the Trust's strategy through operational and consultancy teams across the organisation; development of the organisation's visitor growth strategy; and for operational risk and compliance. Nicola also headed up the corporate planning, performance management, and project and acquisition processes, in support of the Executive team and Board of Trustees.

6.5.7 Roger Thomas OBE

Roger Thomas OBE, is the former senior partner of Eversheds in south Wales. In addition to his legal career, Roger has also held Chair roles with HEFCW, University of Glamorgan, where he was also pro-chancellor, WNO, Chairs of Higher Education Wales, and was a member of Committee of University Chairs, and of Court and Council and vice-president of National Museum of Wales. Roger has also been a member of the Welsh Assembly Government Review of Higher Education in Wales, business partnership adviser for the National Assembly of Wales, vice-chair of the enterprise agency, Business in Focus and vice-chair of Technquest, the educational charity. He is an Honorary Doctor of the University of Glamorgan and an Officer of the Order of St John. Roger is currently Chair of the Penarth Headland Link.

6.5.8 Sarah Dickins

For thirty years, Sarah reported for the BBC on the UK economy and presented a wide range of live radio and tv programmes. She analysed the move from carbon and fossil fuel dependency to decarbonisation and the drive for greater sustainability.

For the last ten years, Sarah has been the Economics Correspondent for Wales. Before that she was the Business Correspondent on BBC 1 and BBC 2 and Presenter of Working Lunch, BBC 2's daily business programme. That job followed six years as Industrial Correspondent for BBC Wales where she was the first woman industrial correspondent on TV in the UK.

Sarah has interviewed heads of state and government Ministers from Margaret Thatcher and Tony Blair to David Cameron and Michael Gove. She has broadcast live for BBC 1, BBC 2 and BBC World from the World Economic Forum in Davos as well as from political party conferences, CBI, and Trades Union Congress.

She has also hosted and chaired numerous events and has now left the BBC to use her skills and experience to help companies overcome barriers to their own Net Zero targets and become more sustainable.

6.5.9 Steven Foulston

Steven Foulston works in a senior Human Resources role at the Royal Opera House, Covent Garden. He previously worked in various HR positions at a number of steelworks sites across south Wales. With a degree in history, Steven has a particularly keen interest in the Roman and medieval periods. Steven splits his time between London and his home in Caerleon.

6.5.10 Ruth Fabby MBE, DL, FRSA, CF

Ruth is seen as a leader, pioneer in her field, and is passionate about empowering disabled artists, challenging social attitudes and pushing boundaries in the disability arts scene through her work as Creative Director with DaDaFest and Disability Arts Cymru. Ruth is also on the Boards of DisArt [Michigan, USA], Unlimited Commissions, and a Council member of Arts Council of Wales. Ruth was also heralded as one of the Wellbeing of Future Generations Act's 100 Changemakers in January 2023.

6.5.11 Cadw Staff Representative

Tracy Dicataldo — Cadw Health, Safety & Wellbeing Manager and staff representative on the Cadw Board.

6.5.12 Trade Union Representatives

Representatives have been nominated from the PCS, Prospect and FDA unions and will play an active part in the review.



Top: Tretower Court and Castle, Powys.

Above: A family at Caerleon Roman Baths, Newport.

- 6.6.1**
Governance is the system of rules, practices and processes by which Cadw is directed and controlled as an Internal Agency of Welsh Government.
- 6.6.2**
Governance refers to the way in which Cadw is governed and to what purpose.
- 6.6.3**
Governance identifies who has power and accountability, and who makes decisions regarding Cadw’s work. It is, in essence, a toolkit which enables the Cadw management team and the Cadw Board to deal more effectively with the challenges of running Cadw.
- 6.6.4**
Governance ensures that Cadw has appropriate decision-making processes and controls in place so that the interests of all stakeholders (employees, community, Cadw members, Cadw suppliers, Cadw customers, owners of designated historic assets and Welsh Government) are balanced.
- 6.6.5**
Governance includes the processes through which Cadw’s objectives are set and pursued in the context of the social, cultural, regulatory, political and policy and physical and market environments.
- 6.6.6**
Governance is concerned with practices and procedures for trying to ensure that Cadw is run in such a way that it achieves its objectives and delivers its purpose whilst ensuring that all stakeholders can have confidence that their trust in Cadw is well founded.
- 6.6.7**
Good governance is important as it provides the infrastructure to improve the quality of the decisions made by those who manage Cadw.
- 6.6.8**
Good quality, ethical decision-making builds sustainability and enables Cadw to fulfil its purpose for future generations as effectively as possible.

Below: Tintern Fire Garden at Tintern Abbey, Monmouthshire, was one of many events included in Cadw’s annual events programme.



6.7.1

Focused upon the review brief and so avoid mission creep.

6.7.2

Useful to both the Deputy Minister and the Department for Culture, Sport and Tourism, Cadw staff, and ultimately to help deliver Cadw's purpose as effectively as possible for the benefit of present and future generations.

6.7.3

Informed by relevant expertise, both within Cadw, and from inside and outside of Wales.

6.7.4

Proportionate. The report should not be overly bureaucratic and be appropriate to the unique and successful role Cadw plays within Wales and its position within Welsh Government and recognise that at least six reviews of various aspects of Cadw have taken place over the past 20 years. Much good work is and has already been undertaken and we need to identify any significant governance challenges and opportunities for Cadw to address.

6.7.5

Constructively critical, rigorous, open, and supportive. If the review identifies the need for change, encourage recommendations which are transformative and bold where they need to be but recognise that these might be dependent on further work and analysis.

6.7.6

Realistic. Focused upon issues Welsh Government and Cadw can control or adjust and put right regarding Cadw Governance, rather than comment on wider issues aligned with our timeline.

6.7.7

Inclusive. Involving all Cadw staff and Board and, where appropriate, Welsh government staff, the public, partners and stakeholders.

6.7.8

Transparent. To ensure clear accountability and openness in all aspects of the review process.

6.7.9

Deliver tangible recommendations that provide assurance to ministers, the public, Cadw staff and all Cadw's stakeholders, that Cadw is best placed to deliver its purpose.

6.7.10

Aligned wherever possible with the Welsh Government *Programme for Government*.

6.7.11

Recognise and celebrate the extraordinary achievements of Cadw, particularly during the pandemic, and since its last review in 2017.

Below: Cadw's Legislation and Policy team worked on consolidating the legislation that culminated in the Historic Environment (Wales) Act 2023.



6.6 Appendix 8 — Key objectives of the 2023 Task and Finish Group. Chair note to TFG 25 April 2023.

- 6.8.1**
To assess the operation, effectiveness and success of the Internal Agency operating model for Cadw and the operational freedoms following the 2017 review.
- 6.8.2**
To consider whether these new arrangements have improved the wider provision of public heritage services at a national level across Wales, and to consider options for how these might be strengthened.
- 6.8.3**
To assess whether the current arrangements provide the most effective model for delivering Welsh Government's objectives for Cadw around increasing visitor numbers, growing membership, growing commercial income, broadening access, and reaching new audiences.
- 6.8.4**
To assess whether the current arrangements support Cadw's conservation mission in caring for Wales' sites of significant heritage significance.
- 6.8.5**
To assess whether the current arrangements support Cadw's policy, legislative and regulatory functions within Wales' historic environment.
- 6.8.6**
To provide ministers with recommendations relating to the current operational arrangements and what improvements, if any, could be put in place.
- 6.8.7**
To make recommendations (if appropriate) on any further analysis or work that might be required.

6.9 Appendix 9 — Heritage review (Historic Wales): feasibility study for a single identity — [*Historic Wales: A roadmap towards Success, Resilience and Sustainability for the Heritage of Wales*](#), February 2017.

6.10 Appendix 10 — [*Historic Wales — Cadw Workstream: Business Case for Change*](#), October 2017.

Below: Pupils from Dŵr y Felin Comprehensive School participated in a Young Custodians scheme which encouraged them to make use of Neath Abbey as an area for learning.





6.11 Appendix 11 — List of consultees, 2023

Consultee	Role
Cadw	
Jason Thomas	Director of Culture, Sport & Tourism
Gwilym Hughes	Deputy Director — Cadw / Head of Cadw
Stephanie Evans	Head of Properties in Care
Kate Roberts	Head of Historic Environment Branch
Huw Davies	Head of Finance & Central Services
Gwydion Griffiths	Head of Marketing & Business Development
Huw Gwillim	Head of Public Engagement & Visitor Services
Chris Wilson	Head of Conservation, Properties in Care
Judith Alfrey	Head of Heritage Regeneration & Conservation
Zara Cottle	Senior Commercial Manager
David Manners	Senior Visitor Services Manager
Angharad Howell	Castle Manager — Caerphilly Castle & Castell Coch
Sheena Williams	Lead Custodian — Plas Mawr
Tracy Dicataldo	Cadw Staff Representative
All staff	Anonymous all-staff survey conducted — 88 responses
Cadw Board	
Jane Richardson	Chair, Cadw Board
Liz Girling	Non-Exec member
Peter Wakelin	Non-Exec member
Gaynor Legall	Non-Exec member
Steven Foulston	Non-Exec member
Welsh Government	
Tim Moss	Director General / Chief Operating Officer
Peter Kennedy	Director HR — People and Places
Dean Medcraft	Director — Finance & Operations, Economy, Treasury & Constitution
David Cullis	Regional Facilities Manager — Welsh Government Estate
Helen Scaife	Bedwas Facilities Manager

Trade Union Representatives

David Edwards	PCS Union representative
Haydn Bradley-Davies	Prospect Union representative
Marie Knox	FDA Union representative

External consultees

Duncan Wilson	Chief Executive, Historic England
Donella Steel	Director of Finance & Corporate Services, Historic Environment Scotland
Pedr ap Llwyd	CEO & Librarian, The National Library of Wales
Christopher Catling	Secretary/CEO, CBHC / RCAHMW
Caroline Crewe-Reed	Commissioner, CBHC / RCAHMW
Nancy Edwards	Chair, CBHC / RCAHMW
Mathew Talfan	Head of Strategy & Operations, Severn Screen / Marketing Consultant
Paul Belford	CEO Clwyd-Powys Archaeological Trust
Andrew Davidson	CEO Gwynedd Archaeological Trust
Andy Marvell	CEO Glamorgan-Gwent Archaeological Trust
Ken Murphy	CEO Dyfed Archaeological Trust
Kate Gardner	National Trust Cymru Consultancy Manager
Paul Southall	National Trust Cymru Consultancy Manager
Sam Johnson	Built Heritage Conservation Officer, Powys County Council
Eleanor Carpenter	Planning Officer, Parc Cenedlaethol Eryri / Snowdonia National Park
Ross Anthony	Caseworker, Historic Buildings & Places
Bob Kindred	Council Member, Institute of Historic Building Conservation
Owain Gwilym	Disability Arts Cymru Exec Director — Llandeilo
Sarah Younan	Amgueddfa Cymru & Arts Council for Wales Council Member
Devinda De Silva	Freelance Creative Practitioner & Arts Council for Wales council member
David Cleary	Freelancer — Disability Arts Cymru / Amdani — Llandudno Council
Rosemary Thompson	Public and Deaf cultural leader
Trisha Ashley	Novelist and former employee of Cadw
Karen Morris	Former Head Teacher, Welsh learner and neurodivergent visitor
Sara Beer	Freelance disability arts activist and performer
Nia Williams	Director of Learning and Public Programmes, Amgueddfa Cymru
Janice Lane	Director of Visitor Experience, Amgueddfa Cymru
Kate Clarke	Former CEO Cadw 2015–17

90-Second Summary

<p>Background</p>	<p>In 2017 a new governance structure was put in place for Cadw. This structure meant that Cadw remained within Welsh Government but became an Internal Agency with some freedoms and flexibilities outside of usual civil service ways of working, that would enable it to fulfil its conservation and engagement purpose.</p> <p>It is now five years since these changes were introduced, and the Deputy Minister has asked for a review to see how effective the new governance model has been. This survey was Cadw staff's opportunity to feedback which bits of the governance model are working and which are not.</p> <p>The survey did not assess how well Cadw is performing, it purely looked at how well the new structure enabled staff to fulfil the vision of a 'Wales where our historic places are cared for, understood and shared by everyone' and our mission of 'caring for our historic places, inspiring current and future generations'.</p> <p>88 Cadw staff completed the survey, which was live between 16 May and 9 June 2023.</p>
<p>Motivated workforce</p>	<p>Cadw staff share a common passion for their work in heritage. They generally respect each other's skills and enjoy the camaraderie. Those in visitor-facing roles enjoy sharing their passion with visitors. There is a sense of pride in working for Cadw, knowing that the job makes a real difference.</p>
<p>Recruitment is the most significant issue to address</p>	<p>Recruitment is the biggest hindrance to staff doing their work effectively. Nearly all (87%) disagree that Cadw has the freedom it needs to recruit staff. The key recruitment issues are:</p> <ul style="list-style-type: none"> • The process takes far too long • WG recruitment is set up for more generic civil service roles but does not properly recognise Cadw's many specialist roles • Cadw is significantly understaffed to achieve its objectives but recruitment is limited by WG head counts
<p>Support for apprentices and volunteers</p>	<p>91% feel it is important for Cadw to have apprentices and 64% feel it is important to have volunteers.</p>
<p>Grade structure needs reviewing</p>	<p>18% feel the WG grading structure works for all of Cadw's roles, but 50% disagree. Some feel that there needs to be an overhaul of custodian grades, better recognition of expertise in specialist roles and less expectation of staff to work above their pay grade.</p>
<p>Divided opinions over Cadw's place within Welsh Government</p>	<p>There is strong support for Cadw to continue as one division, not two, because it allows cohesive working towards a common goal. Opinions are more divided over where Cadw should sit in government. 53% support its place within Culture, Sport and Tourism, but 36% support it being standalone, the main reason being that it would allow Cadw the freedom it needs, especially commercially.</p>
<p>Feedback on the Board</p>	<p>44% believe that the Board helps Cadw to fulfil its mission. The Board is felt to have a wealth of experience to offer, and staff appreciate it when Board members make themselves visible, such as on staff days.</p> <p>However, there are numerous ways in which staff perceive the Board could add more value, including being more visible, understanding what Cadw staff do, explaining decisions more and being more assertive both internally within Cadw and towards government ministers.</p>
<p>Strong home-working benefits, but at some cost to effective communication</p>	<p>Many staff now enjoy the flexibility of working from home and do not want to see this removed. However, some feel that communication lacks post-Covid because of limited in-person interaction. This particularly affects awareness of what other teams are doing. Suggestions include regular in-office days (except for fully onsite roles) and more proactive leadership from senior management to communicate what is happening from the top down.</p>

6.13 Appendix 13 — *Priorities for the Historic Environment of Wales*, September 2018.

6.15 Appendix 14 — Glossary of terms and relevant links

Additional Accounting Officer (AAO)	The Principal Accounting Officer — the Permanent Secretary to the Welsh Government — can nominate and delegate decision-making powers to 'Additional Accounting Officers' who must ensure they maintain high standards of financial management within their designated area of responsibility.
Arms-length organisation	A term used to describe a range of public bodies that operate independently from central government. These include executive agencies, non-departmental public bodies, non-ministerial departments and public corporations.
Audience Development Plan	A practical blueprint for growing audiences, increasing reach and building deeper relationships through the combined efforts of colleagues and stakeholders.
Cadw Board	cadw.gov.wales/about-us/what-we-do/who-we-are
Cadw Internal Agency Framework Document	A document that outlines how Cadw is managed and controlled. A formal document of delegation and internal freedoms granted to the Cadw Board and officers, including financial, operational, HR, procurement and other delegations to enable Cadw to function effectively and efficiently.
Cymru/Wales brand	assets.wales.com/pages/brand
Department of Culture, Sport and Tourism	The Department of Culture, Sport and Tourism is a division within Welsh Government which sits within the Economy, Treasury and Constitution Group.
Equalities Act 2010 and the nine protected characteristics	Discrimination: your rights: Types of discrimination ('protected characteristics') - GOV.UK (www.gov.uk)
Executive Committee of Welsh Government	The Executive Committee is the strategic decision-making forum within Welsh Government that supports the Permanent Secretary in his role as the Principal Policy Advisor to the First Minister, Principal Accounting Officer and Head of the Welsh Government civil service.
Future Generations Commissioner for Wales	www.futuregenerations.wales
Historic environment service	cadw.gov.wales/about-us
Historic Wales Partnership	A strategic partnership between Cadw, Amgueddfa Cymru—National Museum Wales, National Library of Wales and the Royal Commission on the Ancient and Historical Monuments of Wales. Their aim is to work together to collaborate and share expertise across the Welsh heritage sector.
In-house exemption model	A suggested method of working outside normal government recruitment and work practices and policies to suit the specialist nature of Cadw's work. To create bespoke employment policies.
Internal Agency	A division within Welsh Government that operates in accordance with standard policies and procedures and is directly accountable to ministers. Subject to an agreed business need, the division will have delegated certain exemptions, variations and additions to policies or procedures to enable it to operate effectively and efficiently.
Listing	cadw.gov.wales/advice-support/historic-assets/listed-buildings/understanding-listing#section-what-is-listing
Programme for Government	A Welsh Government document listing the commitments that the political party in power aim to deliver within their 5-year term of office.

Scheduling	cadw.gov.wales/advice-support/historic-assets/scheduled-monuments/understanding-scheduling#section-what-is-scheduling
Senior Executive Team (Cadw)	A senior decision-making group within Cadw consisting of the Deputy Director of Cadw and the heads of different branches within Cadw, namely Properties in Care, Historic Environment, Business Development and Marketing, and Finance and Corporate Services.
Social Model of Disability	www.scope.org.uk/about-us/social-model-of-disability/
Task and Finish Group	A group of selected specialists convened to work on a time-limited specific task or objective that needs to be delivered.
The Seven Principles of Public Life (also known as the Nolan Principles)	www.gov.uk/government/publications/the-7-principles-of-public-life
Well-being of Future Generations (Wales) Act, 2015.	www.gov.wales/well-being-future-generations-act-essentials

Caernarfon Castle, Gwynedd.

