

# RESILIENT HERITAGE PROGRAMME EVALUATION

## Second Interim Report

March 2019



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## EXECUTIVE SUMMARY

### Introduction

The National Lottery Heritage Fund commissioned DC Research Ltd to carry out the Resilient Heritage Programme Evaluation. The evaluation commenced in 2018 and continues until the end of 2019. This document is the Second Interim Report.

Resilient Heritage is a grants programme of between £3,000 and £250,000 to help strengthen organisations, build staff and volunteer capacity, and better manage heritage in the long term. The programme aims to support organisations to increase their capacity and capability or to undertake a significant programme of organisational change to become more resilient.

*"The evaluation should seek to understand if grantees have increased organisational resilience, increased capacity or achieved significant strategic change, and the extent to which the programme outcomes have been achieved."*

The key aspects of the method included: desk-based research; survey of heritage organisations involved in the Resilient Heritage programme – as Strength Checker users and/or grant applicants; and a range of Resilient Heritage case studies.

### Awareness of/Engagement with Resilient Heritage (Section 2)

To the end of October 2018, **The Fund had received a total of 1,154 enquiries about Resilient Heritage.**

**More than 70% of the enquiries relate to grants over £10,000**, with less than one-third relating to Resilient Heritage grants of less than £10,000.

The **number of registered users of the Strength Checker** (specifically those that have actively used the Strength Checker), **to October 2018, was 964.**

There were **472 applications for Resilient Heritage grants by the end of October 2018. 43% were approved; 13% of projects had already completed**, 8% were awaiting a decision on their application, and **just over one-third (34%) had been rejected**, whilst a small number had been withdrawn.

Focusing on those applications for which a decision had been made, from 421 applications, 261 had been approved/completed (62%), whilst the remainder (38%) had been rejected. This shows that the **majority of applications to the end of October 2018 had been successful grant applications.**

### Current Perspectives on Resilience (Section 2)

The Fund provides an explanation about what The Fund investment should lead to in terms of resilience within the context of The Fund Outcomes:

#### **The funded organisation will be more resilient**

Your organisation will have greater capacity to withstand threats and to adapt to changing circumstances to give you a secure future. You will achieve this greater resilience through stronger governance and greater local involvement in your organisation; increased management and staff skills; fresh sources of expertise and advice; and working in partnership to share services, staff and resources.

Source: <https://www.heritagefund.org.uk/publications/outcomes-detail#heading-7>, accessed February 2019)

Almost all aspects of this explanation were reflected in the responses received from survey organisations, showing that the (often multi-faceted) understandings of resilience from heritage organisations aligns with The Fund’s explanation.

**The one aspect notable by its absence** is that there is **no mention of working in partnership to ‘share services, staff and resources’** – the word ‘sharing’ does not appear in any responses, and ‘share’ appears in a handful of occasions and only in relation to sharing the heritage asset with local community/audience.

If The Fund is keen for this aspect of resilience (‘working in partnership to share services, staff and resources’) to be further developed it may be that specific support or advice on how to develop/achieve this is required.

Organisations were asked to score their organisation’s current level of resilience, and the **average score (as well as the median and the mode scores) across all respondents was 5.0**, with responses ranging from 1 through to 9.

The survey also asked organisations whether the level of resilience in their organisation had changed in recent years and **three-quarters of respondents report that it has changed.**

**Almost three-quarters (73%) of respondents stated a positive change in their organisation’s resilience**, with just over one-twentieth (5%) reporting that their organisation has become much more resilient in recent years.

### **Resilient Heritage Strength Checker (Section 3)**

The **vast majority (95%) of respondents are aware of the Resilient Heritage Strength Checker**, and **more than nine out of ten respondents (91%) who are aware have made use of the Strength Checker.**

Bringing these results together, the vast majority of respondents (86%) are aware of, and have made use of, the Strength Checker, 9% are aware of the Strength Checker but have not used it, and the remaining 5% are not aware of it.

The **most common route (by far)** through which organisations became aware of the Strength Checker, is **the Resilient Heritage grant application process** - 70% became aware via this route. The next most common routes were via The Fund – just over one-fifth becoming aware via The Fund’s website or email communications from The Fund (21%), and 17% via direct discussions with staff.

In terms of the process of using the Strength Checker, the most common response was ‘easy’ (41%) followed by ‘neither easy not difficult’ (38%). Just over one in ten organisations (12%) reported any level of difficulty with the process of using the Strength Checker (no-one described it as very difficult).

The survey asked organisations about the **usefulness of the results from the Strength Checker, and the results are strongly positive with more than 80% reporting that they found the results useful** – 29% found the results very useful, with more than half (52%) reporting the results as quite useful.

**The majority of respondents (61%) report that using the Strength Checker did provide benefits in terms of improving resilience.**

More than one-third (36%) of organisations report that they have made changes to how they operate due to using the Strength Checker. Therefore, the **majority of respondents (64%) have not changed how they operate due to using the Strength Checker.**

The most common response to the follow-on question about what changes had (or had not) been made, was an overall reflection that **no changes had been made yet as it was either too soon** to have done so **or there is a lack of capacity** within the organisation to do so.

**More than nine out of ten respondents (91%) report that they would recommend the Strength Checker** to other organisations – a strong, positive finding about the overall experiences of using the Strength Checker.

#### **Resilient Heritage Grant Applications and Projects (Section 4)**

The **majority (70%) of organisations that responded to the survey had submitted an application for a Resilient Heritage grant**. It can therefore be inferred that 30% of respondents to the survey have engaged with Resilient Heritage only through using the Resilient Heritage Strength Checker.

More than three-quarters (77%) of organisations found the grant application process very or fairly easy/straightforward – 8% describing it as very easy/straightforward, and 69% describing it as fairly easy/straightforward.

For those applicants that had used the progress reporting and claims/payment processes **the overwhelming majority (94%) described them as straightforward** – with three-quarters reporting it as fairly easy/straightforward and a further 19% reporting it as very easy/straightforward.

The **majority of organisations (74%) reported that they did make use of the Strength Checker in the development of their grant application**.

In terms of success rates for survey respondents, more than half (52%) report that their application was successful, 13% were unsuccessful, and one-third of respondents were awaiting a decision at the time of the survey (34%).

#### *Better Managed...*

Just over one-third (35%) of organisations already report that their organisation is better managed following their Resilient Heritage grant, with a further 61% reporting that whilst this is not yet the case, they do expect that this will be so in the future – i.e. an overwhelming **96% report that their organisation is already better managed or expect it to be so in the future as a result of their Resilient Heritage grant**.

#### *Skills Development...*

Just over one-quarter (26%) of organisations report that their staff, trustees, board or volunteers have already developed skills following their Resilient Heritage grant. An additional two-thirds (67%) report that they expect this to happen, although it has not yet happened – i.e. an overwhelming **93% report that staff, trustees, board, or volunteers have already developed skills or expect them to do so in the future as a result of their Resilient Heritage grant**.

#### *More Resilient...*

More than one-third (37%) of organisations already report that their organisation is more resilient following their Resilient Heritage grant. An additional 59% report that whilst this is not yet the case, they expect that this will happen in the future – i.e. an overwhelming **96% state that their organisation is already more resilient, or that they expect it to be more resilient in the future as a result of their Resilient Heritage grant**.

## 1. INTRODUCTION

- 1.1 The National Lottery Heritage Fund (The Fund) has commissioned DC Research Ltd to carry out the Resilient Heritage Programme Evaluation. The evaluation commenced in early 2018 and will continue until the end of 2019.
- 1.2 This document is the Second Interim Report (produced in February 2019), reporting on evaluation findings to date. The primary research phase that underpins this report was carried out between October 2018 and February 2019.

### Aims of Resilient Heritage

- 1.3 Resilient Heritage is a grants programme of between £3,000 and £250,000 to help strengthen organisations, build staff and volunteer capacity, and better manage heritage in the long term.
- 1.4 Resilient Heritage funding is intended to increase organisational resilience by helping adapt to changing and challenging circumstances, withstand threats and respond to opportunities. The Fund wants to support organisations and groups to build their capacity through adopting new ways of working, testing out ideas, increasing skills of staff, volunteers and trustees and becoming more financially sustainable.
- 1.5 The programme aims to support organisations to increase their capacity and capability or to undertake a significant programme of organisational change in order to become more resilient. This can include taking on new responsibility for heritage, reviewing current business models and implementing change, exploring alternative funding streams (including social investment) or reviewing and setting up new governance arrangements. It is also possible to apply for some short-term revenue support whilst activity is undertaken.
- 1.6 Resilient Heritage grants are expected to deliver the following outcomes:
  - Outcomes for heritage:
    - With our support, heritage will be **better managed**
  - Outcomes for people:
    - With our support, people will have **developed skills**
  - Outcomes for communities:
    - With our support: your organisation will be **more resilient**

### Aims of the Evaluation

- 1.7 According to the Evaluation Brief, the aim of the evaluation is to assess the impact of Resilient Heritage funding on increasing grantees' capacity, capability and overall resilience.
- 1.8 The remit of the evaluation states that the research should address a range of key questions. The full list of questions is included in Annex 1 to this

report. Overall, *"the evaluation should seek to understand if grantees have increased organisational resilience, increased capacity or achieved significant strategic change, and the extent to which the programme outcomes have been achieved."*

### Structure of Report

1.9 The structure of this Second Interim Report is as follows:

- The remainder of **Section 1** provides an overview of key method tasks used in this second interim report.
- **Section 2** provides an overview of the scale of engagement with The Fund's Resilient Heritage programme and summarises **current perspectives on resilience** from survey respondents.
- **Section 3** looks at the **Resilient Heritage Strength Checker** – in terms of awareness, use, benefits and impacts to heritage organisations from using the Strength Checker.
- **Section 4** summarises the findings around the emerging impacts for projects that have been awarded **Resilient Heritage grants** during the period under analysis (March to October 2018) – looking at feedback on the processes, the types of activities supported, and the emerging achievements and impacts.
- **Annex 1** sets out the main questions that the evaluation is due to address over the lifetime of the evaluation.
- **Annex 2** presents the results from the Resilient Heritage Survey carried out in late 2018.
- **Annex 3** presents the case studies that were carried out as part of this Second Interim Report stage of the evaluation.

### Overview of Key Method Tasks for Interim Report

1.10 The key method tasks carried out for this Interim Report included:

- **Desk Based Research and Analysis** – this involved a range of tasks that assessed progress so far with the Resilient Heritage programme. This included analysing a range of data provided by The Fund about the applications and awards for The Fund's Resilient Heritage grant programme as well the use of the Resilient Heritage Strength Checker.
- **Resilient Heritage Survey 2018** – a survey was carried out that invited any heritage organisations that had been involved in the Resilient Heritage programme between March 2018 and October 2018 (those involved from the start of the programme to the end of February 2018 were surveyed as part of the First Interim Report). This includes both users of the Strength Checker and/or applicants to the Resilient Heritage grant programme. The survey invites were sent by email to a total of 249 different individuals from heritage organisations based on information provided by The Fund. A total of 143 valid responses were received, and once the small number of bounce-back/failure emails are discounted, this represents a response rate of 59%.

- In terms of the characteristics of the survey respondents, the relevant tables in Annex 2 provide an indication of this in terms of heritage area (Table A2.1) and geography (Table A2.2) – showing that respondents represent a range of heritage areas across all regions/nations of the UK.
- **Resilient Heritage grantee Case Studies** – A range of projects were selected to be case studies for this Second Interim Report. These projects were drawn from the completed projects and were selected on the basis of positive responses in terms of impacts in their responses to the survey for the First Interim Report. They were selected to provide a mix of types – in terms of: location; heritage area; size of grant awarded; and use (or not) of the Strength Checker. The list of case studies visited and the case studies themselves are included in Annex 3 to this report, and the findings from the cases are integrated into the main reporting sections where appropriate.



## 2. ENGAGEMENT WITH THE RESILIENT HERITAGE PROGRAMME & CURRENT PERSPECTIVES ON RESILIENCE

This section looks at the scale of engagement with the Resilient Heritage programme – both the grant programme and the Resilient Heritage Strength Checker. It also looks at current perspectives on resilience for those that responded to the survey – reflecting on what resilience means to their organisation, perceptions about how resilient their organisation is (and any patterns to this), assessing changes to their resilience in recent years.

### Awareness of and Engagement with The Resilient Heritage Programme

- 2.1 Data provided by The Fund (which covers the period from the start of Resilient Heritage to the end of October 2018) can be used to assess the scale of engagement with Resilient Heritage in various ways. Data was provided about the number of Resilient Heritage enquiries, registered users of the Resilient Heritage Strength Checker, and applications for Resilient Heritage grants, and the findings from this data are presented below.
- 2.2 In total, to the end of October 2018, **The Fund had received a total of 1,154 enquiries about Resilient Heritage.** In terms of the regional breakdown of these enquiries, Table 2.1 below presents this breakdown and shows that the greatest proportion of enquiries are from Scotland (12.9%) followed by the North West (12.5%), and the South East (11.0%). The lowest number of enquiries are from Northern Ireland (2.2%), Wales (4.9%), and the North East (5.2%).
- 2.3 These overall geographic patterns are very similar to those found in the First Interim Report (which looked at data to March 2018) – showing that there has not been any notable shift in the geographic pattern since then.

**Table 2.1: Number of Enquiries to The Fund about Resilient Heritage – by region**

Region	Percent	Number of Enquiries
East Midlands	6.9%	80
East of England	7.8%	90
London	10.7%	123
North East	5.2%	60
North West	12.5%	144
Northern Ireland	2.2%	25
Scotland	12.9%	149
South East	11.0%	127
South West	10.0%	115
Wales	4.9%	57
West Midlands	8.2%	95
Yorkshire and The Humber	7.5%	86
(No Region)	0.3%	3
Total	100.0%	1154

**Source:** DC Research, analysis of data from The Fund’s Resilient Heritage Data (to end October 2018)

2.4 In terms of the specific programme that the enquiries relate to, Table 2.2 shows that **more than 70% of the enquiries relate to grants over £10,000**, with less than one-third relating to Resilient Heritage grants of less than £10,000.

**Table 2.2: Number of Enquiries to The Fund about Resilient Heritage – by Programme**

Programme	Percent	Number of Enquiries
Resilient Heritage – Over £10,000	71.1%	821
Resilient Heritage – Under £10,000	28.9%	333
Total	100.0%	1,154

**Source:** DC Research, analysis of The Fund’s Resilient Heritage Data (to end October 2018)

2.5 The assessment summary for the 1,154 enquiries (Table 2.3) shows that just **less than one-third (29.7%) of enquiries were ‘discouraged at present’ in terms of progressing their Resilient Heritage application.**

**Table 2.3: Assessment Enquiries to The Fund about Resilient Heritage**

Programme	Percent	Number of Enquiries
Advice Given	68.4%	789
Discouraged as Presented	29.7%	343
(blank)	1.9%	22
Total	100.0%	1,154

**Source:** DC Research, analysis The Fund’s Resilient Heritage Data (to end October 2018)

**Table 2.4: Where did you hear about The Fund?**

Sources	Percent	Number of Enquiries
Advice agency (e.g. CVS)	1.9%	22
Heritage agency	2.0%	23
The National Lottery Heritage Fund event	4.6%	53
The National Lottery Heritage Fund publication	1.0%	12
The National Lottery Heritage Fund website	10.8%	125
Local authority	4.8%	55
Media (TV, radio, newspaper)	2.1%	24
Non National Lottery Heritage Fund event	1.1%	13
Other	5.9%	68
Other funder	1.8%	21
Previous application to The National Lottery Heritage Fund	35.2%	406
Previous programme enquiry	4.5%	52
Social Media	0.4%	5
Word of mouth	18.0%	208
(blank)	5.8%	67
Total	100.0%	1,154

**Source:** DC Research, analysis of The Fund’s Resilient Heritage Data (to end October 2018)

- 2.6 Whilst the question in this data is generally about 'where did you hear about The Fund?' rather than specifically about Resilient Heritage, it is worth looking at the most commonly reported routes for Resilient Heritage enquiries – and Table 2.4 shows that 'previous applicant to The Fund' was by far the most common (35%) – almost twice as common as the second placed 'word of mouth' (18%), with The Fund website the third most popular route (11%).
- 2.7 Turning to the **number of registered users of the Strength Checker** (and specifically those that have used the Strength Checker, rather than those who have simply registered but not used it), **to the end of October 2018, there were a total of 964 registered users**<sup>1</sup>.
- 2.8 The regional breakdown of these users is presented in Table 2.5 below – and shows that (as with the number of enquiries) the regions/nations with the largest proportion of users are Scotland (11.5%) and the North West (11.1%) alongside London (10.3%).

**Table 2.5: Registered Users of the Resilient Heritage Strength Checker – by primary region or country of service delivery**

Region	Percent	Number of Registered Users
East Midlands	5.7%	44
East of England	5.8%	45
England Wide	1.4%	11
London	10.3%	80
North East	4.7%	36
North West	11.1%	86
Northern Ireland	2.7%	21
Scotland	11.5%	89
South East	10.0%	77
South West	9.8%	76
UK Wide	6.7%	52
Wales	4.4%	34
West Midlands	8.5%	66
Yorkshire and the Humber	7.2%	56
Total	100%	773

**Source:** DC Research, analysis of data from The Fund Resilient Heritage Data (to end October 2018) – a total of 191 users where no regional data is provided have been excluded from this analysis.

- 2.9 Excluding England-wide, the regions/nations representing the lowest proportion of Strength Checker users are Northern Ireland (2.7%), Wales (4.4%) and the North East (4.7%). Whilst The Fund could look to ensure that there is sufficient awareness about, and promotion of, the availability of the Strength Checker in these areas, it should be noted that the lower proportions here may simply reflect the relative size of these geographic areas.

<sup>1</sup> This is the number of registered users that have run a diagnostic or report from the Strength Checker, rather than just those that have registered but not used the Strength Checker to this extent thus far.

2.10 Part of the process of the Strength Checker includes asking users if they are looking to apply for a Resilient Heritage grant (all 964 users (i.e. 100%) said that this was the case), and if so, how much they intend to apply for. Table 2.6 summarises the responses and shows that most Strength Checker users intended to apply for a grant of between £50,000 and £100,000 (29.5%) followed by grants of between £10,000 and £50,000 (27.4%).

**Table 2.6: Value of Resilient Heritage grant registered users of the Strength Checker intend to apply for**

	Percent	Number of Registered Users
Under £10,000	19.4%	142
£10,000 to £50,000	27.4%	201
£50,000 to £100,000	29.5%	216
£100,000 to £250,000	23.7%	174
Total	100%	733

**Source:** DC Research, analysis of The Fund’s Resilient Heritage Data (to end October 2018)

2.11 In terms of the **actual number of applications for Resilient Heritage grants, this totalled 472 applications by the end of October 2018.** Of this total, **43% were approved** (i.e. active projects at that point in time); **13% of projects had already completed**, 8% were pending awaiting a decision on their application, and **just over one-third (34%) had been rejected**, whilst a small number had been withdrawn pre or post-decision – see Table 2.7.

**Table 2.7: Applications for Resilient Heritage grants to October 2018**

Project Status	Percent	Number of Applications
Approved	43%	201
Complete	13%	60
Live	8%	37
Rejected	34%	160
Withdrawn post-decision	0%	1
Withdrawn pre-decision	3%	13
Total	100%	472

**Source:** DC Research, analysis of The Fund’s Resilient Heritage Data (to end October 2018)

2.12 Focusing on those applications for which a decision had been made (i.e. excluding both the live and the withdrawn applications), out of a total of 421 applications, 261 had been approved/completed (62%), whilst the remainder (38%) had been rejected. This shows that the **majority of applications to the end of October 2018 had been successful grant applications.**

**Table 2.8: Success Rates for Resilient Heritage grant applications – by size of grant requested**

	Approved/ Completed	Rejected	Number of Applications
Up to £10,000	64%	36%	136
£10,001 to £50,000	69%	31%	87
£50,001 to £100,000	60%	40%	133
£100,001 to £250,000	52%	48%	65
Average	62%	38%	421
Total	261	160	842

**Source:** DC Research, analysis of The Fund’s Resilient Heritage Data (to end October 2018). **Note:** this excludes ‘live’ or ‘withdrawn’ applications as at October 2018.

2.13 The level of success for applications by size of grant requested was assessed – and the results are presented in Table 2.8. This shows that the success rates for the smaller awards (up to £10,000 and £10,001 to £50,000) are above average, whilst the success rates for the larger awards (£50,001 to £100,000 and £100,001 to £250,000) are below average.

2.14 Table 2.9 below presents the success rate by region/nation – showing that applications from Northern Ireland (89%), East Midlands (78%), Wales (75%) and South West (74%), have the highest success rates. Conversely, West Midlands (48%), Scotland (51%), and Yorkshire and the Humber (53%), have the lowest success rates.

**Table 2.9: Summary of Success Rates for Resilient Heritage grant applications – by region/nation**

	Approved/ Completed	Rejected	Number of Applications
East Midlands	78%	22%	45
East of England	63%	38%	16
London	64%	36%	44
North East	63%	37%	30
North West	61%	39%	54
Northern Ireland	89%	11%	9
Scotland	51%	49%	47
South East	56%	44%	43
South West	74%	26%	31
Wales	75%	25%	24
West Midlands	48%	52%	42
Yorkshire and The Humber	53%	47%	36
Total	62%	38%	421

**Source:** DC Research, analysis of The Fund’s Resilient Heritage Data (to end October 2018). **Note:** this excludes ‘live’ or ‘withdrawn’ applications.

2.15 Looking at success rates for grant applications by type of heritage, Table 2.10 shows that Museums, libraries, archives and collections has the highest success rate (70%), followed by Historic buildings and monuments (67%) – with these heritage types also accounting for the highest number of applications.

**Table 2.10: Summary of Success Rates for Resilient Heritage grant applications – by type of heritage**

	Approved/ Completed	Rejected	Number of Applications
Community heritage	50%	50%	40
Historic buildings and monuments	67%	33%	187
Industrial maritime and transport	57%	43%	30
Intangible heritage	0%	100%	2
Land and biodiversity	53%	47%	73
Museums libraries archives and collections	70%	30%	83
Non-heritage	33%	67%	6
Total	62%	38%	421

**Source:** DC Research, analysis of The Fund’s Resilient Heritage Data (to end October 2018). **Note:** excludes ‘live’ or ‘withdrawn’ applications

### Current Perspectives on Resilience

2.16 The Fund provides an explanation about what The Fund’s investment should lead to in terms of resilience within the context of The Fund’s Outcomes:

#### The funded organisation will be more resilient

Your organisation will have greater capacity to withstand threats and to adapt to changing circumstances to give you a secure future. You will achieve this greater resilience through stronger governance and greater local involvement in your organisation; increased management and staff skills; fresh sources of expertise and advice; and working in partnership to share services, staff and resources.

Source: <https://www.heritagefund.org.uk/publications/outcomes-detail#heading-7>, accessed February 2019)

2.17 The heritage organisations that responded to the survey were asked to explain what resilience means for their own organisation, and the responses can be considered relative to the above explanation.

2.18 The ‘capacity to withstand threats and adapt to changing circumstances’ appears as a very common theme in the responses. Within this, there are two notable groups of responses: those that talk about it primarily in terms of **just surviving** (i.e. keeping the organisation going, not closing, keeping the doors open, surviving difficult financial climate), and those that talk about in terms of **moving from surviving to developing and then thriving** as an organisation – including the ability to both respond to threats but also to respond positively to change and be open to, and to take, new opportunities.

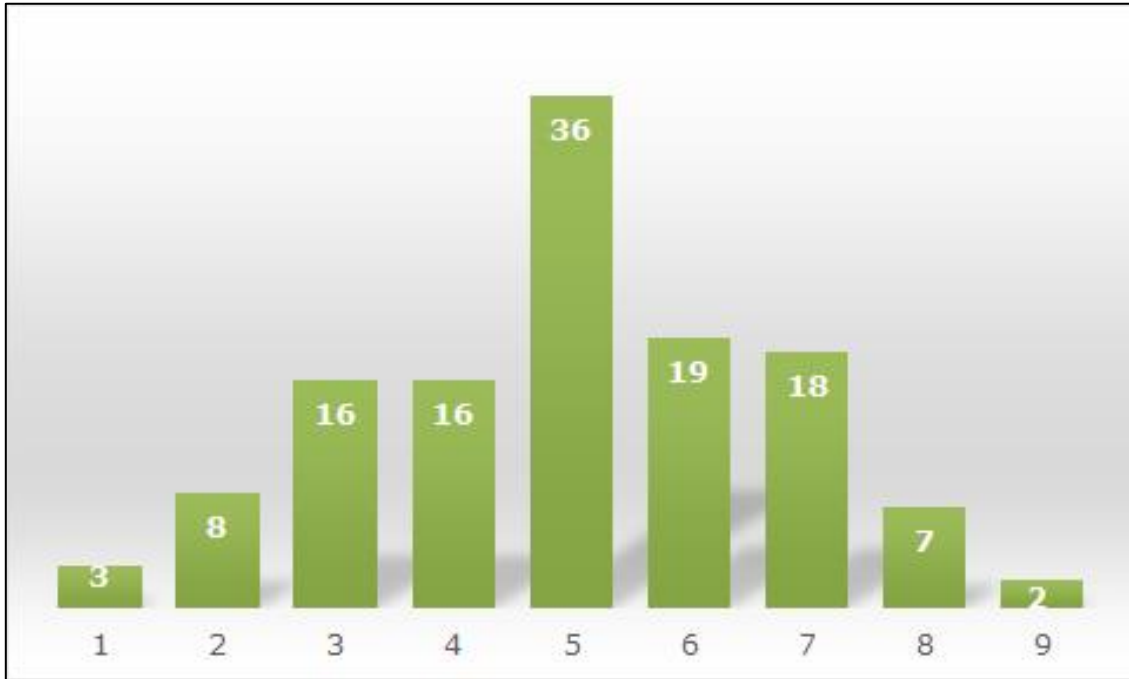
2.19 This second group therefore notes and acknowledges **a process of resilience** – the journey of moving from a survival only mindset/position towards a stronger, more positive attitude with the ability to respond positively, adapt, and be flexible and mobile enough to react to changing circumstances and develop/take new opportunities.

- 2.20 A common consideration in the responses relating the **having greater capacity was about resilience in terms of finances** – with a cohort of responses highlighting that resilience for them relates to various financial aspects – e.g. more income overall, greater diversity of income streams/sources, more financial reserves within the organisation, etc.
- 2.21 ‘Stronger governance’ is also commonly mentioned in the responses, usually within the context of strengthening the organisation in various ways through **strengthening the governance**, developing **better or more robust plans and strategies**, and introducing or improving **processes, systems and structures**.
- 2.22 ‘Greater local involvement’ is another strong theme in the responses – and this primarily emerges through mentions of **developing or strengthening the scale and level of community engagement and community involvement** by the responding organisations. This is not always about local involvement – community of interest (in the specific heritage) is often mentioned alongside community of place (i.e. local involvement).
- 2.23 ‘Increased management and staff skills’ – emerges as a very strong theme, with common categories of response including reference to **improving the skills of trustees, management and staff**. Within this, there is reference to both the **skills specific to the heritage of the organisation** and also the more organisational development skills – notably **business, financial and fundraising skills** – that organisations highlight they need to become more resilient.
- 2.24 ‘Fresh sources of expertise and advice’ is also mentioned in the responses, but it is not as commonly referenced as the other aspects above. Most commonly this is mentioned in the context of connections with networks and partners as a source of such information, knowledge and advice.
- 2.25 Whilst there is notable reference to connecting with partners in this context (as a route to expertise, advice, knowledge and information) this is not to the extent of working in partnership which is mentioned only by a very small minority of respondents (less than 5).
- 2.26 Also **notable by its absence** is that there is **no mention of working in partnership to ‘share services, staff and resources’** – the word ‘sharing’ does not appear in any responses, and ‘share’ only appears on a handful of occasions and only in relation to sharing the heritage asset with the local community/audience. As such, this aspect of resilience is notable by its absence (something that was also the case in the First Interim Report).
- 2.27 If The Fund is keen for this aspect of resilience (‘working in partnership to share services, staff and resources’) to be further developed it may be that specific support or advice on how to develop/achieve this is required. There is a broader literature and previous research on models of partnership working (including in the culture/heritage context), which highlights that this type of partnership working (sharing staff/resources) is challenging.



2.28 The heritage organisations that responded to the survey were asked to score their organisation’s current level of resilience, and Figure 2.1 below summarises the findings graphically, showing that the average score (as well as the median and the mode scores) across all respondents was 5, with responses ranging from 1 through to 9.

**Figure 2.1: How resilient would you say your organisation is at the current time (0 = low, 10 = high)**



**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=125

2.29 These scores can also be analysed against other characteristics, to consider if there are any patterns – e.g. by region; by engagement with the Resilient Heritage programme (i.e. awareness and use of the Resilient Heritage Strength Checker, submitting a grant application); etc. The results of analysis by such characteristics are presented in Annex 2 (Tables A2.22 to A2.27) and the main findings are summarised below<sup>2</sup>:

- There are **variations in terms of the average score by region** – with the South West (3.87), the North West (4.56) and Yorkshire (4.63) all reporting below average scores (i.e. compared to the overall average of 5.0). Those regions reporting the highest averages include North East (6.0), and West Midlands (5.88).
- The **average score for those not aware of the Strength Checker is higher** (6.3) than for those that are aware of the Strength Checker (4.9). In addition, the **average score for non-users of the Strength Checker is very slightly higher** (5.0) than for those that have used it (4.9).

<sup>2</sup> In some instances, the number of respondents in a particular group is low – e.g. the number of respondents from Northern Ireland. As such, caution should be used when drawing any conclusions from these results.



- Whilst some of these groupings are small in number (i.e. those that are not aware of, or have not used, the Strength Checker) these results do suggest that the **Strength Checker is more commonly being used by those reporting lower levels of resilience** – with those reporting higher scores less likely to use, or even be aware of, the Strength Checker.
  - Whilst it is worth noting that those **organisations reporting a positive change in their resilience in recent years have higher scores than those that report a negative change, the divergence in scores between these groups is not as pronounced as it was in the same analysis for the First Interim Report, especially for those reporting mid-level changes.**
  - The average score for those that have submitted a Resilient Heritage grant application is higher than for those organisations that have not (5.1 compared to 4.8), whilst the average score for successful applicants is higher than for unsuccessful applicants (5.4 compared to 4.5). This suggests that those applying for Resilient Heritage are more resilient than those that have not applied (in terms of their own self-assessment of their resilience), and also that once applications have been submitted, those with higher scores are more likely to be successful – this is an issue that will be given further consideration in the final stage of this evaluation. It may be that there is a group of heritage organisations being 'left behind' – i.e. they are reporting lower levels of resilience, and are either unable to submit an application, or are submitting applications that are unsuccessful.
  - Finally, it is also worth noting that the overall scores around resilience are lower in this report than the same measures were in the First Interim Report (e.g. overall average of 5.0 compared to 5.64). It will be interesting to consider, in the final stage of the evaluation in late 2019 whether this pattern continues, and if so, what issues may underpin this.
- 2.30 Organisations responding to the survey were asked to explain why they gave their organisation that score, and a number of common themes emerged, when the results were assessed in relation to the scores given.
- 2.31 For those reporting high scores (8 or more) some of the common themes were around:
- **Security of income, good financial management, and financial prudence** – alongside/underpinned by a sustainable operating model.
  - **Implementation of recent reviews** – around governance, organisational development, structures, processes, and systems that have boosted or enhanced the resilience of the organisation.
  - The **strong governance** arrangements, **quality of trustees, alongside an appropriate organisational culture.**

- **Recent activities and experiences**, confirming the ability of the organisation to react flexibly to and adapt to external challenges and opportunities.

2.32 For those respondents reporting low scores (2 or less), the common themes in the responses included the following:

- Most commonly (by far), the **lack of funding** (especially any secured or ongoing funding) as well as **recently losing main sources of income** underpinned low scores. A number noted that they rely on grant income rather than having any core income streams.
- For others, **issues around their premises** were causing concerns which affect their resilience – lack of premises, issues with the current location, lack of public access, etc.
- Some organisations are currently going through **wider transitions and developments** which results in their current low score.
- Other organisations (including those that scored themselves as a 3) also highlighted **governance issues** and a **lack of capacity** (including **over-reliance on a few individuals**) as the main factors underpinning their low score.

2.33 The survey also asked organisations whether the level of resilience in their organisation had changed in recent years and, as Table 2.11 below shows, **three-quarters of respondents report that it has changed.**

**Table 2.11: Has the level of resilience of your organisation changed in recent years?**

	Percent	Number
Yes	74%	93
No	19%	24
Don't Know	6%	8

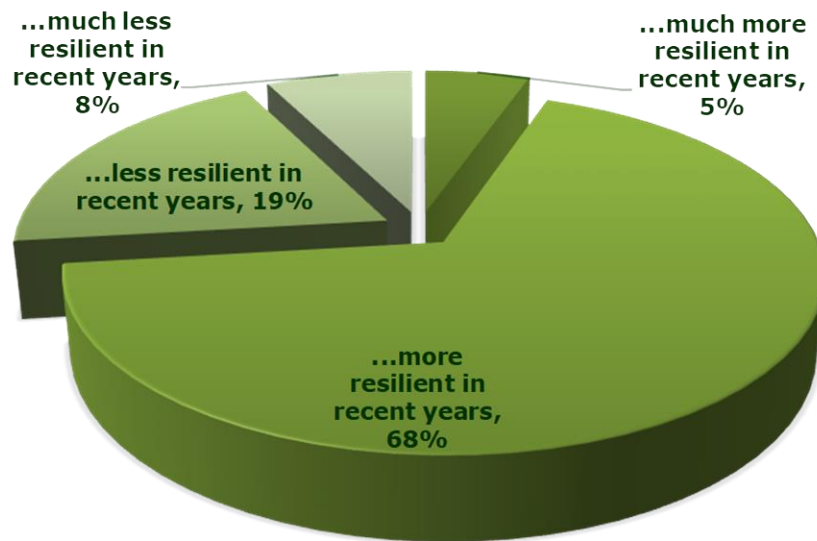
**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=125

2.34 For those that reported a change, the organisations were asked what type of change has occurred and the results are included in Figure 2.3.

2.35 **Almost three-quarters (73%) of respondents stated a positive change in their organisation’s resilience**, with just over one-twentieth (5%) reporting that their organisation has become much more resilient in recent years.

2.36 Conversely, more than one-quarter stated that their organisation has become less resilient in recent years, with close to one-fifth (19%) describing themselves as less resilient, and 8% stating they have become much less resilient in recent years.

Figure 2.3: Change in level of resilience in recent years



**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=93

2.37 Overall, this is a generally positive picture in terms of increasing resilience, however, more than one-quarter report a worsening position. In addition, it should be noted that the organisations responding to the survey are those engaged in some way with resilience through either registering/using the Strength Checker and/or applying for a Resilient Heritage grant, and as such, it could be anticipated that many would already have taken steps to, or would be currently taking steps to, increase their own resilience.

2.38 In terms of increasing resilience, organisations were asked what type of changes they would expect to see if their organisation was to become more resilient in the future. The most common issues were:

- **Income and funding** – increasing core funding and self-generated income in particular, as well as taking positive steps around diversifying income sources, to reduce reliance on small number of funding sources. Also, **increasing the financial reserves** of the organisation was often mentioned.
- Developing more of a **focus on income generation and fundraising**, including the development and implementation of fundraising strategies and business plans as well as having the **capacity to dedicate to fundraising**.
- Development of **trustees and governance arrangements** – increasingly around attracting ‘professional’ trustees with relevant skills, knowledge and experience – with specific issues for some around diversity of trustees and a lack of younger trustees. In some cases, restructuring or improving current governance arrangements was highlighted.
- **Increased staff capacity and capability** – i.e. more staff and, in particular, skilled and experienced staff. **Increasing volunteer**

**capacity** was mentioned by some as a route to addressing capacity and thereby helping to improve resilience.

- **Audience development, diversification of audiences, as well as increasing and diversifying membership** (where relevant) and boosting the wider support base for the organisation – including enhancing the profile of the organisation with audiences, key stakeholders, and potential funders.
- Introducing, or **improving the strategies/plans as well as the supporting systems and processes** to make the organisation more effective and better managed.

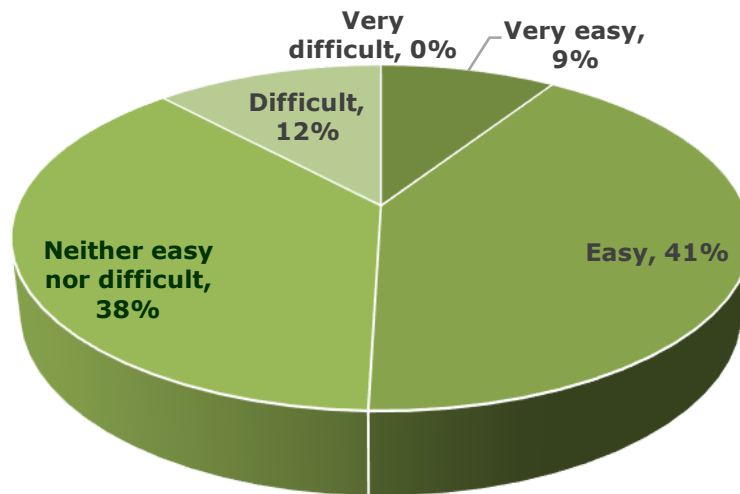
### 3. RESILIENT HERITAGE STRENGTH CHECKER

This section focuses on the Resilient Heritage Strength Checker and looks at the level of awareness and use of the Strength Checker, as well as issues around the process of using the Strength Checker, the benefits to organisations from using it, as well as the types of changes made by organisations as a result of using and applying the Strength Checker.

#### Awareness and Use of the Resilient Heritage Strength Checker

- 3.1 The survey results show that survey respondents have a high awareness of, and high levels of use of, the Resilient Heritage Strength Checker.
- 3.2 Table A2.5 in Annex 2 shows that the **vast majority (95%) of respondents are aware of the Resilient Heritage Strength Checker**, with the subsequent table (Table A2.7) showing that **more than nine out of ten respondents (91%) have made use of the Strength Checker**.
- 3.3 Taking these results together, the vast majority of respondents (86%) are aware of, and have made use of, the Strength Checker, 9% are aware of the Strength Checker but have not used it, and the remaining 5% report not being aware of (and therefore not using) the Strength Checker.
- 3.4 The small minority of organisations that are aware of, but have chosen not to use the Strength Checker, were asked to explain why they had not used it. Most of the reasons provided were about individual circumstances of the organisation – the only common theme was around a lack of time for the organisation to be able to dedicate to it.
- 3.5 The survey also asked organisations how they became aware of the Strength Checker, and Table A2.6 shows that the **most common route (by far) has been through the Resilient Heritage grant application process**, with 70% becoming aware via this route.
- 3.6 The next most common routes were via The Fund – with just over one-fifth becoming aware from The Fund’s website or email communications from The Fund (21%), and others (17%) via direct discussions with The Fund’s staff.
- 3.7 In terms of the process of using the Strength Checker, Figure 3.1 shows that the most common response was ‘easy’ (41%) followed by ‘neither easy not difficult’ (38%). Just over one in ten organisations (12%) reported any level of difficulty with the process of using the Strength Checker (and no-one described it as very difficult), whilst 9% described the process of using the Strength Checker as very easy. These findings show that, for those that have used the Strength Checker, there are no major issues with the processes involved.

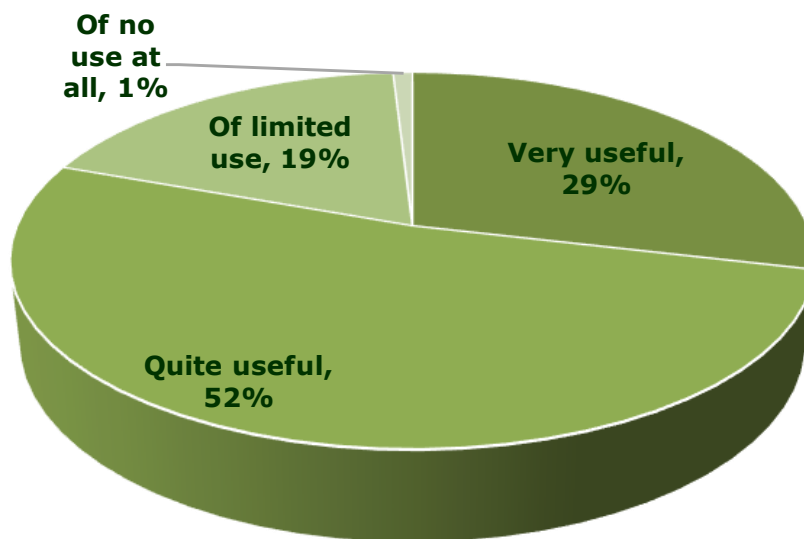
**Figure 3.1: How easy or difficult did you find the process of using the Resilient Heritage Strength Checker?**



**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=109

3.8 The survey asked organisations about the **usefulness of the results from the Strength Checker, and the results are strongly positive with more than 80% reporting that they found the results useful** – 29% found the results very useful, with more than half (52%) reporting the results as quite useful. Less than 1% described the results as being of no use at all, and 19% found the results to be of limited use.

**Figure 3.2: How useful did you find the results from the Resilient Heritage Strength Checker?**



**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=108

### Benefits and Impacts of the Resilient Heritage Strength Checker

- 3.9 Those organisations that reported having used the Strength Checker were asked about the benefits and impacts from having done so.
- 3.10 In terms of the Strength Checker providing benefits to the organisation in terms of improving resilience, **the majority of respondents (61%) report that using the Strength Checker did provide benefits in terms of improving resilience** – see Table A2.10 in Annex 2.
- 3.11 Organisations were asked what the main benefits of using the Strength Checker had been for them. A number of common themes emerged in the responses.
- The Strength Checker **highlighted the weaknesses and challenges** for the organisation to address.
  - The Strength Checker **supported or reinforced the organisation’s understanding of their current strengths and weaknesses**.
  - The Strength Checker provided an **independent source of evidence and review** about the issues to address for the organisation.
  - Linked to this, the Strength Checker was described as **‘usefully uncomfortable’** for trustees in making them consider the results.
  - The Strength Checker helped to **clarify thinking** for the organisation going forward.
  - For many, the Strength Checker helped inform/**develop their Resilient Heritage grant application or highlighted the need to apply**.
- 3.12 For those that stated there had been no benefits from using the Strength Checker so far, the main reasons offered included:
- A **lack of capacity within the organisation** to address the issues raised.
  - Having only relatively recently completed the use of the Strength Checker, some respondents felt it was **too early to say** if there were/would be any benefits.
  - A reflection that the Strength Checker **had not told them anything that they did not already know** about their organisation.
  - A feeling that the Strength Checker was **not suitable to their type** of organisation (e.g. a local authority) **or to their size of organisation**.
- 3.13 Organisations were asked whether they had made any changes to how they operate due to using the Strength Checker, and more than one-third (36%) of organisations report that they have made changes to how they operate – see Table A2.11. Whilst this does mean that the **majority of respondents (64%) have not made any changes to how they**

**operate due to using the Strength Checker**, it is useful to consider the types of changes that have (or have not) been made.

- 3.14 The most common response to the follow-on question about what changes had (or had not) been made, was an overall reflection that **no changes had been made yet as it was either too soon** to have done so **or there is a lack of capacity** within the organisation to do so.
- 3.15 Other organisations noted that to be able to make any of the changes would require additional funding/resources, and that they have not yet been able to do so due to a lack of such funding/resources as well as a lack of staff time or capacity.
- 3.16 Those that did report a change referred back to the benefits of using the Strength Checker outlined above - i.e. supporting an application for the Resilient Heritage grant.
- 3.17 Other aspects mentioned as changes already made by organisations include:
- Changes in **governance** to address the issues highlighted by the Strength Checker (e.g. appointing new trustees, creating new committees/structures).
  - Changes to **financial management and reporting**.
  - Change of **organisational model/status**.
  - **Additional resources** for facilities management or other operational aspects.
  - **Addressing skills gaps** by undertaking training courses/programmes for staff and/or governing body.
- 3.18 **For this cohort of organisations (more than one-third of survey respondents), the Strength Checker has already led to, or contributed to, actual changes in the ways in which the organisations operate.**
- 3.19 Organisations were asked whether or not they would recommend the Strength Checker to other organisations, and **more than nine out of ten respondents (91%) report that they would recommend the Strength Checker** – which can be regarded as a strong, positive finding about the overall experiences of using the Strength Checker.



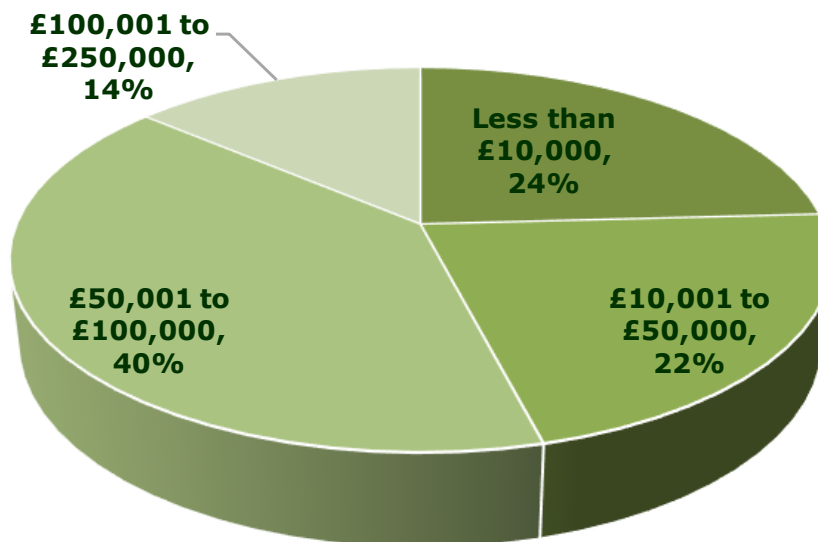
#### 4. RESILIENT HERITAGE GRANTS – EMERGING IMPACTS

This section focuses on those organisations that have been involved in the Resilient Heritage grant programme (and in particular, those that applied for a Resilient Heritage grant between March 2018 and October 2018) – and looks at the feedback on the application process and progress reporting, the types of activities and projects that have been funded, and the achievements and impacts so far.

##### Overview of Resilient Heritage Grant Applications

- 4.1 Table A2.13 in Annex 2 shows that the **majority (70%) of organisations that responded to the survey had submitted an application for a Resilient Heritage grant.** It can therefore be inferred that 30% of respondents to the survey have engaged with Resilient Heritage through only using the Resilient Heritage Strength Checker.
- 4.2 In terms of the level of award applied for, Figure 4.1 shows that there has been a mix of award scale, with most applications falling within the £50,001 to £100,000 category (40%), followed by the almost one-quarter (24%) of respondents that submitted applications for grants of less than £10,000. Just over one-fifth applied for awards between £10,000 and £50,000 and the remaining 14% applied for awards in excess of £100,000.

**Figure 4.1: What level of The Fund’s Resilient Heritage grant did you apply for?**



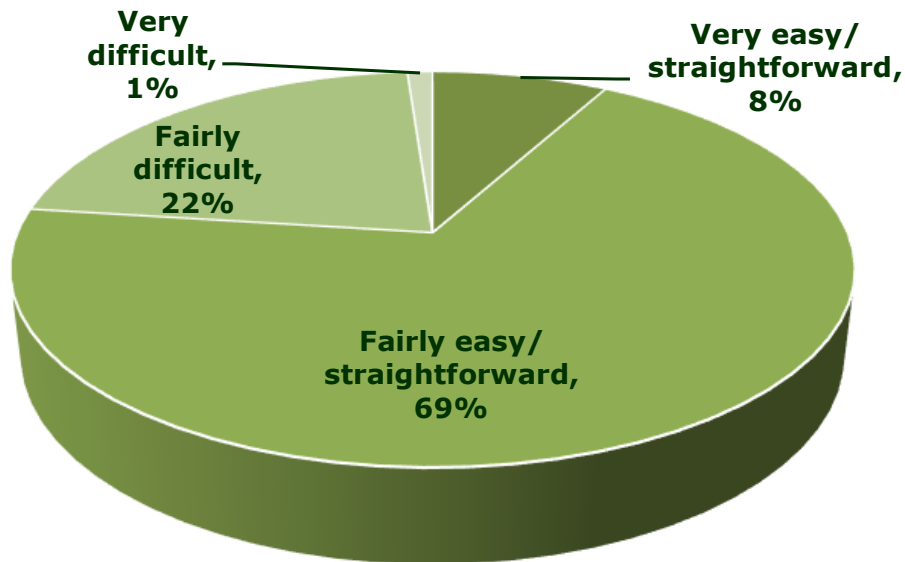
**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=87

- 4.3 In terms of the grant application process, more than three-quarters (77%) of organisations found the process very or fairly easy/straightforward – with 8% describing it as very easy/straightforward, and the other 69% describing it as fairly easy/straightforward – see Figure 4.2. These results

also show that more than one-fifth of respondents (23%) found the grant application process fairly or very difficult.

4.4 An assessment of the characteristics of the one-fifth of organisations that found the application process fairly or very difficult does not identify any strong patterns of particular types or locations of organisations that fall into this category.

**Figure 4.2: How did you find the Resilient Heritage grant application process?**



**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=87

4.5 Comparison was made between the level of ease/difficulty reported about the application process and the size of award applied for – to assess if applicants for larger awards reported different levels of difficulty. The results are in Table 4.1 and show that there is a fairly consistent pattern, with the exception of those applying for awards between £10,000 and £50,000 where there is a higher than average proportion of respondents describing the process as easy.

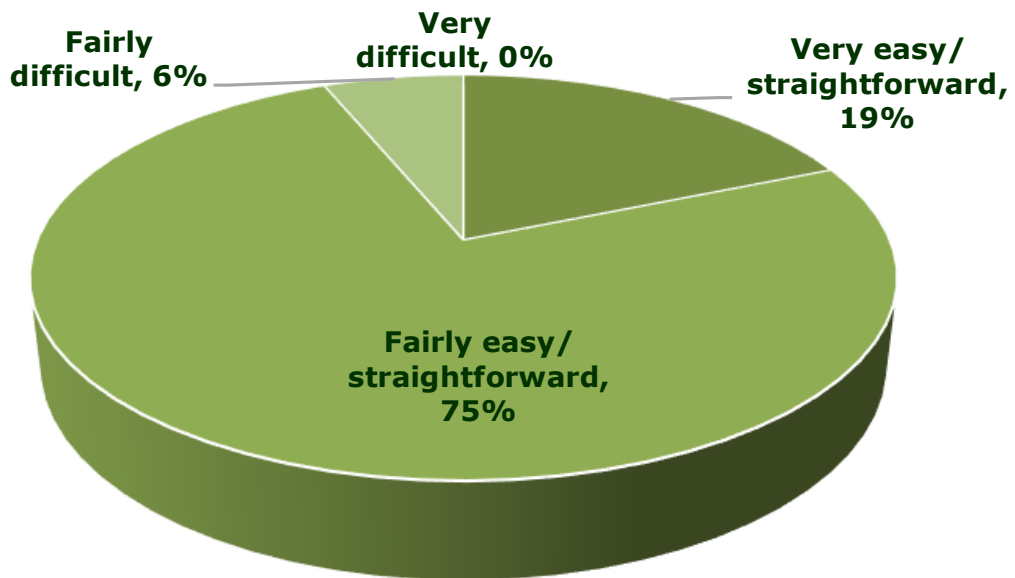
**Table 4.1: Size of Grant Applied for and level of ease/difficulty of application process**

Level of grant applied for	Very or fairly easy/straightforward	Very or fairly difficult	Number of Replies
Less than £10,000	76%	24%	21
£10,001 to £50,000	84%	16%	19
£50,001 to £100,000	74%	26%	35
£100,001 to £250,000	75%	25%	12
Average	77%	23%	-
Total Replies	67	20	87

**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=87

4.6 For those applicants that reported they had used the progress reporting and claims/payment processes (Table A2.16), Figure 4.3 shows that **the overwhelming majority (94%) described the progress reporting and claims/payment processes as straightforward** – with three-quarters reporting it as fairly easy/straightforward and a further 19% reporting it as very easy/straightforward.

**Figure 4.3: How do you find the Resilient Heritage progress reporting and claims/payment processes?**



**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=32

4.7 The **majority of organisations (74%) responding to the survey reported that they did make use of the Strength Checker in the development of their grant application** – see Table A2.17 in Annex 2.

4.8 For those organisations that did not make use of the Strength Checker, the reasons offered are consistent with the explanations (see Section 3) about not using the Strength Checker generally – i.e. a lack of awareness of the Strength Checker, or the Strength Checker not being appropriate or relevant to the organisation (or the specific project for which funding was being sought).

**Resilient Heritage Projects – Activity, Progress & Emerging Impacts**

- 4.9 In terms of success rates for those that responded to the survey, Table A2.18 shows that more than half (52%) of organisations that submitted a grant application report that their application was successful, 13% were unsuccessful, and one-third of respondents were awaiting a decision at the time of the survey (34%).
- 4.10 For organisations that were not successful in their grant application, the survey asked what had happened to the project for which they had sought Resilient Heritage funding:
- Most commonly, organisations reported that they have **plans to resubmit** an application to The Fund, based on the feedback they received to their unsuccessful application.
  - Others reported that, at the current time, the **project is on hold, or has stalled**, with the organisation not being in a position to progress it at this time via any other routes.
  - Finally, a small number of responses noted the **use of other funding/resources** – either the organisation’s own funds, or from another funder – to take forward parts of the planned project – but with changes commonly having occurred in the scale or range of activity being reduced as a result of the application being unsuccessful.
- 4.11 For those organisation’s that were successful in their grant application, they were asked to **summarise the main activities that they are carrying out as a result of the Resilient Heritage grant**.
- **Training** is a key part of many of the projects and is the most often reported activity – this includes providing training to trustees, management, staff and volunteers across a range of activities.
  - **Plan development** is the next most commonly reported activity – and this includes high-level, strategic planning, business plans, fundraising strategy, marketing plans, organisational development plans, transition plans, project plans, asset management plans, etc. In some instances, this is in-house activity, but on many occasions external consultants are being brought in to support the organisations in this plan development.
  - **Increasing staff capacity** – a number of projects have used their funding to appoint staff at various levels of the organisation. This includes core activities, development activities, and support activities. In addition, capacity issues have also been addressed through the use of consultants – including on commercial activities, marketing, fundraising, IT, HR, and governance. Additionally, some organisations are reviewing their volunteering arrangements, looking to address capacity issues through recruiting new volunteers and volunteer development.
  - **Organisational reviews** – including organisation-wide reviews as well as reviews of specific aspects of working procedures, processes,

systems, governance, management, IT, resourcing, accountability, building condition.

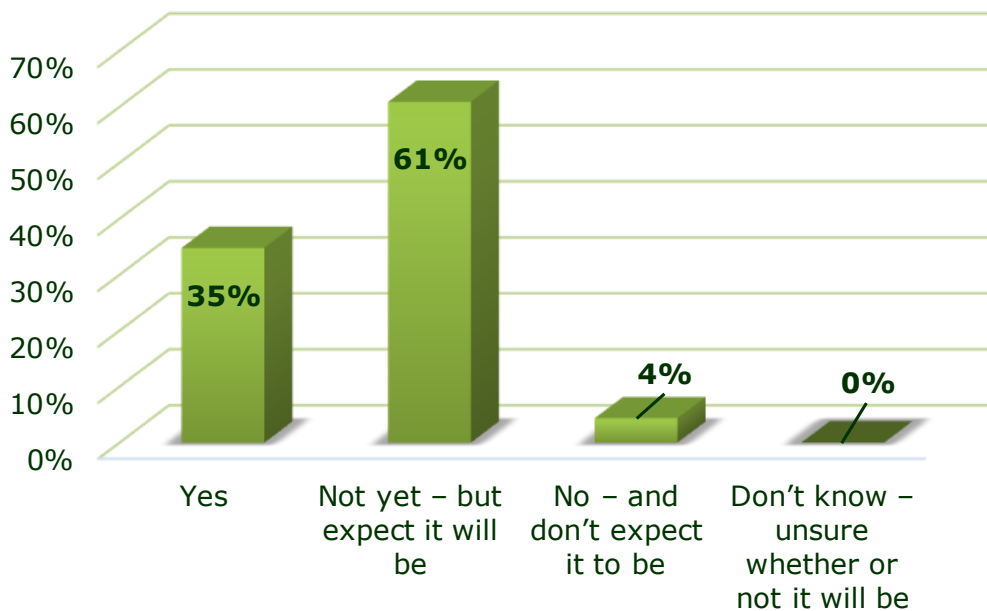
- **Fundraising** – a range of activities around fundraising also feature for a number of projects, including the development of specific fundraising initiatives, fundraising strategies, drawing on external fundraising consultant expertise, appointing staff in specific fundraising roles, and offering fundraising training to staff.

4.12 In terms of the emerging achievements and impacts (and noting that the survey was sent to currently active rather than completed projects), organisations were asked about the impact the grant has had on their organisation in relation to the three main outcomes of The Fund – heritage will be better managed; people will have developed skills; and organisations will be more resilient.

**Better Managed...**

4.13 Figure 4.4 shows that just over one-third (35%) of organisations already report that their organisation is better managed following their Resilient Heritage grant, with a further 61% reporting that whilst this is not yet the case, they do expect that this will be so in the future. In total, an overwhelming **96% of respondents report that their organisation is already better managed or expect it to be so in the future.**

**Figure 4.4: Would you say your organisation is now (or will be) better managed following your Resilient Heritage grant?**



**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 46

4.14 Looking at the responses in more detail, the most common examples of improved management relate to:

- **Strategy** – with key examples including the production of strategic and key documents; having a clear(er) strategy to follow; being able to focus

on strategic issues; working towards the same strategic plan; enabling and supporting the trustees to focus on strategic management; developing the skills and strategies to manage the organisation well.

- **Clear objectives** – examples here build on the strategy issues above and have led to better management through being able to focus on the organisation's objectives; having an agreed vision throughout the organisation; and through the development of clear objectives and related actions.
- **Training** – whilst issues around training naturally link to the skills outcome below, training provision was also given notable mention in examples from respondents around better management – relating to improved management resulting from the provision of staff, volunteer and trustee training; the offer of training and guidance to individuals in the organisation; as well as specific delivery of training for, and the development of, volunteers (as well as sessional staff).
- **Addressing skill gaps** – organisations have been able to identify skills gaps; acknowledged such lack of skills and related management issues; and take steps to address them – resulting in improved management for the organisation.
- **Volunteer recruitment** – a notable number of examples relate to the improved management around better recruitment of, development of, and management of volunteers.

4.15 In addition to the above, other common themes of note around examples of better management included:

- **Development and enhancement of (more robust) systems** to gather data and produce meaningful outputs.
- Implementation of **stronger governance arrangements**, and changes to/improvements to governance structures and committees.
- Development of **more collaborative working within the organisation**, including examples of inter-connected teams working more effectively.
- **Recruitment of new directors, managers, and other staff** – enhancing the management of the organisation, as well as leading to better management knowledge, improved structures and better support.

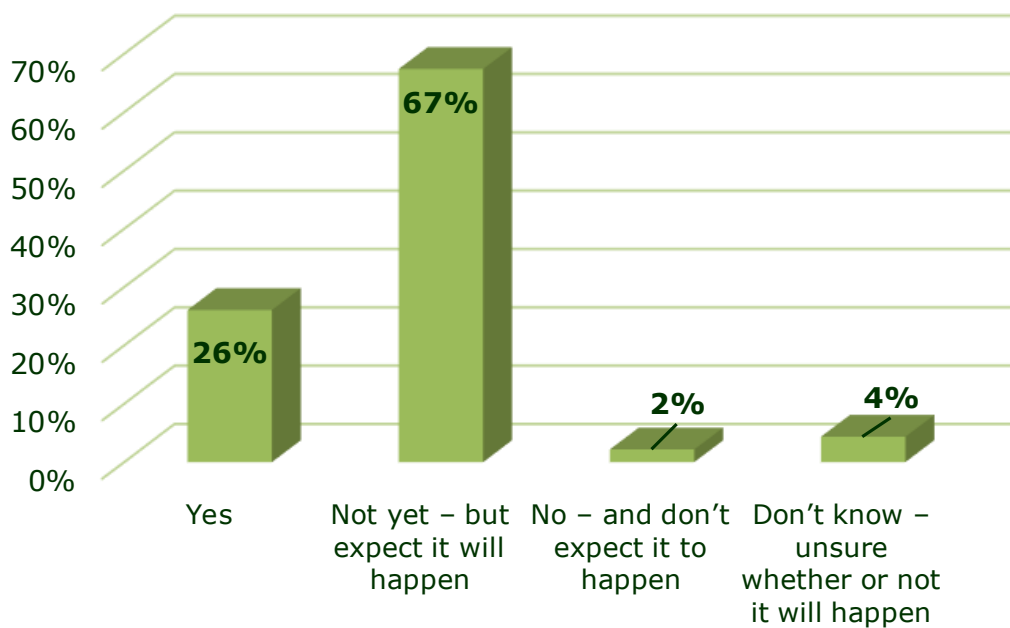
### Case Study Examples of Better Managed...

- The **Chestnuts House** project **identified business and governance models that will revitalise** Chestnuts House, and in the long term improve public access, to **enable it to become a sustainable and resilient heritage asset** in the heart of Waltham Forest.
- For the **Guild of St Mary's Centre**, Lichfield, the Resilient Heritage grant helped prepare a **series of documents to plan for the long-term future** of the building and its collections and **make the case for investment in the Church**.
- For the **Bishop Meadow's Trust**, the activities that resulted in the **production of a report about long term planning and management** also **increased the capacity and capability of the Trust to manage** the Meadow, and whilst changes to the Meadow itself may not be noticeable for several years, the Trust reports **positive changes in the vision, approach and composition of the Board** of the Bishop's Meadow Trust.
- Also for the Bishop Meadow's Trust project, some **volunteers were involved** in the evidence gathering process, learning how professional wildlife surveys are conducted and gaining experience in species identification.
- **Shambellie House Trust's** project included the **production of a Business Plan** for the future of the House, building on the various other strands of work (outline plans and costings; market research; programme of board development; and community workshops). The Plan has **helped the Trust to move from 'idea' to 'development'** – and they now believe they have a comprehensive, robust, detailed plan covering all aspects of the ambitions for the House.
- The **Norman Nicholson Society** used their Resilient Heritage grant to carry out a survey, feasibility study and concept development for Norman Nicholson's home. Through the project, members of the Society have received professional insights into the challenges and processes associated with such a project which will **enable judgements and decisions to be reached from a much more informed position** as it looks to develop and deliver the Norman Nicholson House project.
- **Pope's Grotto Preservation Trust** used their project to carry out a range of activities that have all **supported better management by improving the knowledge and understanding of trustees about the heritage asset** – including developing a fundraising strategy; an audience development plan; a digital survey of the grotto; mapping the location of defects in the chamber; and other investigative work.

### Skills Development...

4.16 Figure 4.5 shows that just over one-quarter (26%) of organisations report that their staff, trustees, board or volunteers have already developed skills following their Resilient Heritage grant. An additional two-thirds (67%) report that they expect this to happen, although it has not yet happened. In total, an overwhelming **93% of respondents report that staff, trustees, board, or volunteers have already developed skills or expect them to do so in the future as a result of their Resilient Heritage grant.**

**Figure 4.5: Would you say the staff/trustees/board/volunteers in your organisation have already developed (or will develop) skills following your Resilient Heritage grant?**



**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 46

4.17 Looking at the individual responses and drawing on the case studies, it is clear that **training opportunities have been provided, and skills have been, or are being, developed for trustees/governing body representatives, staff** of various levels, and volunteers.

4.18 The skills development activity covers a **wide range of subjects** – with the most common areas of skills development identified by survey respondents being:

- Fundraising
- Marketing and Communication
- Volunteers/volunteer management
- Planning (including business planning as well as strategic planning)
- Governance



- Financial management
- Capital project management
- Other forms of specific training (e.g. GIS mapping software; financial software (e.g. Sage); First Aid training; training for filming and editing videos).

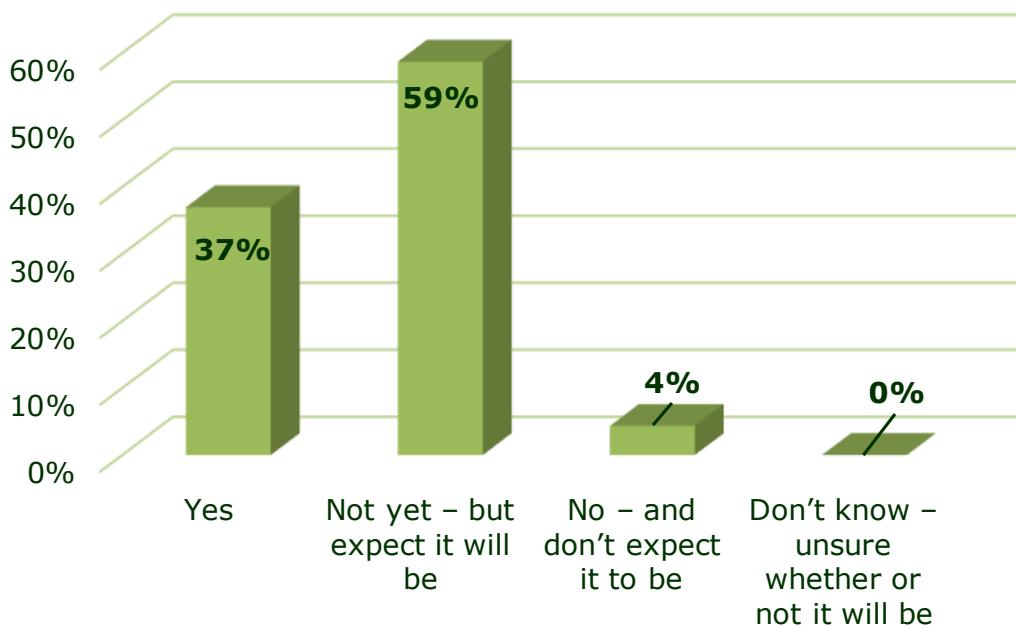
▪ **Case Study Examples of Skills Development...**

- As part of the **Chestnuts House project**, **training was delivered** to seven young people to support the project in determining how heritage can benefit young people in the LB Waltham Forest, and support innovation. It provided those involved with **practical skills and experience** in local decision making and improving services.
- For the **Guild of St Mary's Centre**, a **governance report** commissioned as part of the project informed St Mary's that Trustees need to be more proactive and work in a different way, and a **skills audit** resulted in trustee applications from new and existing trustees.
- **Shambellie House Trust** undertook a **programme of board development and training** as part of their project, including a **skills audit**, and as a result now have a stronger board. They have **recruited new trustees** to the board, **expanding the skillset** of the board – sending trustees on tailored courses to develop particular skills, addressing gaps in expertise and knowledge, and now feel that they have a very strong board with the correct mix of people involved.
- As part of the **Reclaimed Lands** project, a **range of training needs were identified** and **Groundwork North East & Cumbria signposted individuals to skills and training providers**. In addition, **training in fundraising**, researching, bid writing all took place through the project.
- **Pope's Grotto Preservation Trust** project helped to **enhance the skills of existing trustees**, as well as **furthering and advancing their knowledge**. In addition, the Trust **initiated a process of recruiting new trustees** to help address skills and knowledge gaps within the Trust.

**More Resilient...**

4.19 Figure 4.6 shows that more than one-third (37%) of organisations already report that their organisation is more resilient following their Resilient Heritage grant. An additional 59% report that whilst this is not yet the case, they expect that this will happen in the future. In total, an overwhelming **96% of respondents state that their organisation is already more resilient, or that they expect it to be more resilient in the future as a result of their Resilient Heritage grant.**

**Figure 4.6: Would you say your organisation is now (or will be) more resilient following your Resilient Heritage grant?**



**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 46

4.20 For a number of organisations, their responses about 'better managed' and 'skills development' are some of the key areas that have made their organisation more resilient, and they referred back to these previous responses in their answers to this question.

4.21 Above and beyond these aforementioned issues, there are a range of specific issues that organisations identify that have already led to increased resilience for their organisation:

- **Funding** – this, by far, is the **most common area mentioned in relation to increased resilience**, and the examples identified include: the securing of core funding; developing a clear(er) idea of where future, core and capital funds will come from; enhanced income generation plans; increases in income received; identifying new sources of external funding; identifying sources of alternative income; diversification of income streams; the organisation being more focussed on income generation; the fundraising function and capacity of the organisation being strengthened; a better understanding of sources of income that

can be utilised; individual giving fundraising strategy development; recruitment of dedicated fundraising staff (or use of dedicated fundraising consultant). As such, the funding examples include both **(i) actual, additional funding/income received so far** as well as **(ii) enhanced attitudes, capacity, knowledge and capability around all aspects of fundraising.**

- **Cost effectiveness and increased efficiency** – along with increases in income generation for organisations, increased resilience can also be achieved through improvements and efficiencies around being more cost effective - reducing costs; improving understanding of issues and financial implications of decisions; more efficient delivery of services; etc.
- **Understanding of organisational vision, strategies and plans** – the development of aspects such as a clear, shared vision; a comprehensive business plan; a future strategy – with these being understood and bought into across the organisation is a key aspect of improving the organisation’s resilience.

4.22 Other additional themes that organisations identified as examples of activity that have supported this increased resilience included:

- **Better engagement with community groups** and the wider **local community.**
- Establishing a better/stronger **presence in local and national heritage networks.**
- The organisation having a **more professional outlook**, greater **confidence**, a **stronger board/trustees** and staff team, **improved discipline** in meetings and decision making; and **robust systems and processes** to help provide meaningful data to influence future organisational management.

### Case Study Examples of More Resilient...

- **Chestnuts House** now has a long-term plan, and the London Borough of Waltham Forest has **secured Greater London Authority funding to take forward the Business Plan in more detail**. The building will play a key role in the Waltham Forest's London Borough of Culture 2019 activities.
- The London Borough of Waltham Forest have gained a lot of learning from the **Chestnut's House** project and has a **much clearer idea about the way forwards and how to realise the potential of the building**, in a way that enhances its historic significance.
- For the **Bishop Meadow's Trust**, the project provided the Board with a **clear plan to follow**, resulting in **improvements in confidence and vision**, and a willingness to plan and **fundraise** for the long term.
- The Bishop Meadow's Trust has also **reviewed and restructured its membership**, which is more active as a result, and its **profile** within Farnham **has significantly improved**.
- For the **Guild of St Mary's Centre**, subleasing the ground floor of the building to Staffordshire County Council to provide a new relocated library for Lichfield provided a **great opportunity to take forward the Resilient Heritage funded plans to restore the building and significantly improve footfall**. This **provides income to secure St. Mary's for the long term** and expand and develop its education programme with local schools.
- With the **completion of the five strands of work** supported by the Resilient Heritage grant, the **Shambellie House Trust is now resilient** and has a **good evidence base** and is in a **position to apply for capital funding**. If successful, the Trust will commence discussions with the Scottish Government concerning the transfer of ownership of Shambellie House from the Government to the Trust.
- The Reclaimed Lands project helped **Groundwork North East & Cumbria** to **strengthen their existing networks, boost their profile** with partners and stakeholders in the area, and **increased the level of partnership working** that the organisation undertakes with both national agencies and local volunteers. All of this has helped to **build and enhance the reputation** of the organisation.
- As a result of the project, the **Norman Nicholson Society** now feel they have **'fantastic knowledge' about the property**, alongside an **improved confidence** in both the specific project about the house as well as the Society more generally. The project also helped to **engage the local community** in the project, **raising awareness** about the plans and **engendering local support**.
- As a result of the activities and improvements supported through the project, the **Trustees consider that Pope's Grotto is in a much stronger position** for the long term, through **greater knowledge and understanding of the heritage, stronger financial position** through the **implementation of the fundraising strategy** and action plan, and through **raising the profile** of the project and engaging new audiences.

**ANNEX 1: KEY QUESTIONS FOR THE EVALUATION**

The Evaluation Brief for the Resilient Heritage Programme Evaluation states that the evaluation should address the following overarching questions across the course of the evaluation (i.e. between early 2018 and the end of 2019):

1. How did overall management capacities (governance, leadership, management, fundraising, financial management, communications etc.) improve as a result of capacity building engagement?
2. In what ways have the quality of grantees activities improved?
3. In what ways have grantees capacity increased (scale, reach or extent of impact)?
4. For those looking to take on the management of heritage, to what extent has the Resilient Heritage grant prepared them for this?
5. Is there evidence that the change Resilient Heritage enables grantees to achieve leads to long term sustainability?
6. How effective was the mentor support element?
7. How effective was the Resilient Heritage Strength Checker in identifying needs and priorities for project planning and improving organisational strength?

## ANNEX 2: RESILIENT HERITAGE 2018 SURVEY RESULTS

**Table A2.1: Which of the following heritage areas does your organisation work in? (please tick all that apply)**

Heritage Area	Percent	Number
Community heritage	51%	73
Historic buildings and monuments	54%	76
Industrial maritime and transport	13%	19
Intangible heritage	17%	24
Land and biodiversity	26%	37
Museums libraries archives and collections	38%	54

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 142

**Table A2.2: Which nation/region is your organisation located within?**

Nation/Region	Percent	Number
East Midlands	13%	18
East of England	5%	7
London	12%	17
North East	6%	9
North West	19%	27
Northern Ireland	7%	10
Scotland	11%	16
South East	17%	24
South West	15%	21
Wales	6%	9
West Midlands	11%	16
Yorkshire and The Humber	18%	26

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 143  
(Note: respondents could identify multiple nations/regions in their response)

**Table A2.3: Has the level of resilience of your organisation changed in recent years?**

	Percent	Number
Yes	75%	93
No	19%	24
Don't Know	6%	8

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 125

**Table A2.4: If YES, how has it changed?**

	Percent	Number
Our organisation has become much more resilient in recent years	5%	5
Our organisation has become more resilient in recent years	68%	63
Our organisation has become less resilient in recent years	19%	18
Our organisation has become much less resilient in recent years	8%	7

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 93

**Table A2.5: Are you aware of the Resilient Heritage Strength Checker**

	Percent	Number
Yes	95%	122
No	5%	6

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 128

**Table A2.6: How did you become aware of the Resilient Heritage Strength Checker?**

	Percent	Number
Through the Resilient Heritage grant application process	70%	85
From The National Lottery Heritage Fund website or email communications from The Fund	21%	26
From another website	0%	0
Via direct discussions with The Fund staff	17%	21
Via social media	0%	0
Word of mouth	4%	5
Other (please specify)	4%	5

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 121

**Table A2.7: Have you used the Resilient Heritage Strength Checker?**

	Percent	Number
Yes	91%	110
No	9%	11

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 121

**Table A2.8: How easy or difficult did you find the process of using the Resilient Heritage Strength Checker?**

	Percent	Number
Very easy	9%	10
Easy	41%	45
Neither easy nor difficult	38%	41
Difficult	12%	13
Very difficult	0%	0

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 109

**Table A2.9: How useful did you find the results from the Resilient Heritage Strength Checker?**

	Percent	Number
Very useful	29%	31
Quite useful	52%	56
Of limited use	19%	20
Of no use at all	1%	1

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 108

**Table A2.10: Has using the Resilient Heritage Strength Checker provided any benefits to your organisation in terms of improving your organisation's resilience?**

	Percent	Number
Yes	61%	66
No	39%	43

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 109

**Table A2.11: Have you made any changes to how your organisation operates due to using the Resilient Heritage Strength Checker?**

	Percent	Number
Yes	36%	38
No	64%	69

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 107

**Table A2.12: Would you recommend the Resilient Heritage Strength Checker to other organisations?**

	Percent	Number
Yes	92%	99
No	8%	9

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 108



**Table A2.13: Has your organisation submitted an application to the Heritage Lottery Fund Resilient Heritage Programme?**

	Percent	Number
Yes	70%	90
No	30%	38

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 128

**Table A2.14: What level of Resilient Heritage grant did you apply for?**

Level of Grant	Percent	Number
Less than £10,000	24%	21
£10,001 to £50,000	22%	19
£50,001 to £100,000	40%	35
£100,001 to £250,000	14%	12

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 87

**Table A2.15: How did you find the Resilient Heritage grant application process?**

	Percent	Number
Very easy/ straightforward	8%	7
Fairly easy/ straightforward	69%	60
Fairly difficult	22%	19
Very difficult	1%	1

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 87

**Table A2.16: How do you find the Resilient Heritage progress reporting and claims/payment processes?**

	Percent	Number
Very easy/ straightforward	7%	6
Fairly easy/ straightforward	28%	24
Fairly difficult	2%	2
Very difficult	0%	0
N/A - Have not used them	63%	55

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 87

**Table A2.17: Did you make use of the Resilient Heritage Strength Checker in the development/planning of your Resilient Heritage grant application?**

	Percent	Number
Yes	74%	66
No	26%	23

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 89

**Table A2.18: Was your Resilient Heritage grant application successful?**

	Percent	Number
Yes	52%	47
No	13%	12
Don't know - awaiting decision	34%	31

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 90

**Table A2.19: Would you say your organisation is now (or will be) better managed following your Resilient Heritage grant?**

	Percent	Number
Yes	35%	16
Not yet – but expect it will be	61%	28
No – and don't expect it to be	4%	2
Don't know – unsure whether or not it will be	0%	0

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 46

**Table A2.20: Would you say the staff/trustees/board/volunteers in your organisation have already developed (or will develop) skills following your Resilient Heritage grant?**

	Percent	Number
Yes	26%	12
Not yet – but expect it will happen	67%	31
No – and don't expect it to happen	2%	1
Don't know – unsure whether or not it will happen	4%	2

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 46

**Table A2.21: Would you say your organisation is now (or will be) more resilient following your Resilient Heritage grant?**

	Percent	Number
Yes	37%	17
Not yet – but expect it will be	59%	27
No – and don't expect it to be	4%	2
Don't know – unsure whether or not it will be	0%	0

**Source:** DC Research, Resilient Heritage Survey - 2<sup>nd</sup> Interim Report, n = 46

**Table A2.22: Average Scores by Region for: How resilient would you say your organisation is at the current time?**

	Average Score	Lowest Score	Highest Score	Number of Replies
East Midlands	5.56	2	8	9
East of England	5.33	4	8	3
London	5.42	2	7	12
North East	6.00	5	7	2
North West	4.56	1	8	16
Northern Ireland	5.40	1	7	5
Scotland	5.10	3	9	10
South East	5.50	2	8	16
South West	3.87	2	6	15
Wales	5.00	5	5	2
West Midlands	5.88	3	9	8
Yorkshire	4.63	1	7	19
Total/Average	<b>5.00</b>	<b>1</b>	<b>9</b>	<b>125</b>

**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=117. **Note:** multi-region organisations (i.e. those that ticked more than one region) have been excluded from analysis, reducing the total from 125 to 117 for this table only.

**Table A2.23: Average Score: Awareness of the Resilient Heritage Strength Checker?**

	Average Score	Number of Replies
No	6.3	6
Yes	4.9	119
Total	5.0	125

**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=125

**Table A2.24: Average Score: Use of the Resilient Heritage Strength Checker?**

	Average Score	Number of Replies
No	5.0	11
Yes	4.9	108
No reply (to Strength Checker question)	6.3	6
Total	5.0	125

**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=125

**Table A2.25: Average Score: Change in level of resilience in recent years**

	Average Score	Number of Replies
Our organisation has become much more resilient in recent years	6.0	5
Our organisation has become more resilient in recent years	5.2	63
Our organisation has become less resilient in recent years	5.1	18
Our organisation has become much less resilient in recent years	2.4	7
No reply (to change in level of resilience question)	5.0	32
Total	5.0	125

**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=125

**Table A2.26: Average Score: Submission of Application to Resilient Heritage Programme**

	Average Score	Number of Replies
No	4.8	36
Yes	5.1	89
Total	5.0	125

**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=125

**Table A2.27: Average Score: Was Resilient Heritage grant application successful?**

	Average Score	Number of Replies
No	4.5	12
Yes	5.4	46
Don't know (awaiting decision)	4.7	31
No reply (to success of application question)	4.8	36
Total	5.0	125

**Source:** DC Research, Resilient Heritage Survey 2018 - 2<sup>nd</sup> Interim Report, n=125

### ANNEX 3: RESILIENT HERITAGE CASE STUDIES

This annex lists the Resilient Heritage grantee case studies that were carried out during this second interim phase of the evaluation in early 2019. Each of the cases are completed projects and they provide examples of the types of activities supported by Resilient Heritage as well as the emerging impacts, achievements and lessons resulting from Resilient Heritage grant support.

The table below lists the case studies that were visited during the Interim Reporting phases of the evaluation and is followed by a case study write-up of each of the projects.

**Table A3.1: Resilient Heritage Case Studies for Second Interim Report**

Applicant	Project title	Region	Heritage Area	Grant
Groundwork NE	The Reclaimed Lands	North East	Industrial maritime and transport	£9,500
London Borough of Waltham Forest	Chestnuts House Creative Enterprise Centre Feasibility Study	London	Historic buildings and monuments	£79,700
Norman Nicholson Society	Norman Nicholson House survey, feasibility study and concept development	North West	Historic buildings and monuments	£9,900
Pope's Grotto Preservation Trust	Discovering Alexander Pope's Grotto: the pilot project	London	Historic buildings and monuments	£17,200
Shambellie House Trust	Developing Shambellie House for workshops and residential courses on photography, arts/crafts, history, environment and wildlife	Scotland	Historic buildings and monuments	£11,400
The Bishop's Meadow Trust	The Bishop's Meadow Trust -Undertaking surveys to strengthen knowledge for future planning and management	South East	Land and biodiversity	£9,500
The Guild of St Mary's Centre Lichfield	Revitalisation of St Mary's	West Midlands	Museums libraries archives and collections	£38,500

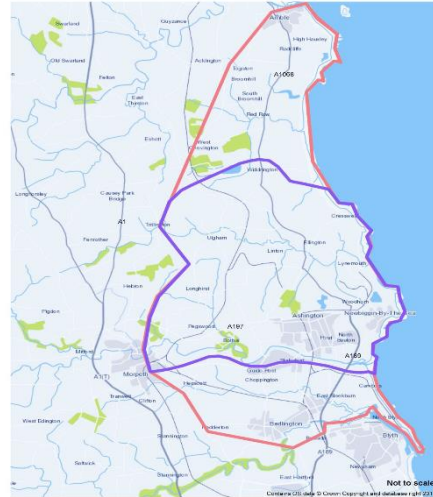
## Groundwork North East & Cumbria

### 'The Reclaimed Lands'

The **Reclaimed Lands** project for **Groundwork North East & Cumbria** grew out of a need from the woodland community groups in South East Northumberland and some of the other user groups (for instance Healthy Walks groups) to know where to go for woodland expertise and knowledge, funding, group governance, help with recruitment of volunteers, marketing information, help with tools, and reporting on a range of issues.

The project was devised by Groundwork North East & Cumbria with support from landowners, the local authority and volunteers. The main aim was to bring together the woodland volunteer groups that work on the reclaimed coal sites with Northumberland County Council and other stakeholders, including the Forestry Commission, to create a steering group to move the management, maintenance and improvement of these public sites to a sustainable future.

A secondary aim was to test the viability of working towards a Landscape Partnership Project for South East Northumberland.



The Reclaimed Lands project was funded by a Resilient Heritage grant to the value of £9,500. The project ran from June 2017 to Sept 2018 and involved Northumberland County Council, 8 volunteer groups and 28 stakeholders.

Reclaimed Lands aimed to transform the informal network of community groups, individuals and organisations into a formalised partnership with appropriate governance and a long-term management plan to better conserve, enhance and celebrate the rich industrial heritage and reclaimed landscape of South East Northumberland.

It sought to harness enthusiasm and expertise to build capacity with appropriate physical, thematic and organisational links to ensure the heritage is managed in a joined-up way, being better equipped to adapt to changing circumstances, withstand threats to the heritage and respond to opportunities to conserve, enhance and celebrate heritage long into the future.

The Reclaimed Lands project team at Groundwork North East & Cumbria were tasked with achieving a range of outputs for the project:

- engaging a range of project partners
- researching and mapping the area's heritage
- building a partnership of at least 12 partners
- making a skills audit
- running training in strategic and business planning, fundraising, research and bid writing (training in fundraising and bid writing were delivered by NCVO)

- writing a feasibility study to link sites
- running 6 community engagement activities
- creating a strategic Board of 8 members
- development of an action plan

**Many of the original elements of the bid have been achieved** - consultations with groups, community consultations, heritage and natural heritage sites mapped, access routes mapped, training needs signposted, site links explored, and draft management plan prepared. The skills audit did not happen and, most notably, the context for the creation of the strategic Board (and the wider partnership) changed at an early stage of the project.

The original idea was to create the network with a Board to steer activity and then, by gathering expertise and buy-in from all likely parties, to pull together a Reclaimed Lands Landscape Partnership bid. However, Landscape Partnerships are no longer part of The Fund's grant programmes and the intention evolved from this original plan towards a fledgling Board, led by Northumberland County Council, to consider other approaches towards reaching to a stronger and more resilient position. This element is still ongoing.



In terms of **skills outcomes**, through the Reclaimed Lands project a **range of training needs were identified**, and Groundwork North East & Cumbria **signposted individuals to skills and training providers**.

In addition, **training in fundraising**, researching, bid writing all took place through the project – delivered by NCVO.

In terms of **increased resilience** the Reclaimed Lands project helped Groundwork North East & Cumbria to **strengthen their existing networks, boost their profile and visibility** with partners and stakeholders in the area, and **increased the level of partnership working** that the organisation undertakes with both national agencies and local volunteers. All of this has helped to **build and enhance the reputation** of the organisation.

In addition, there was a significant amount of engagement with various Friends groups through the project – both individually and collectively – and this also helped to increase the level of partnership working as well as a pledge from such groups to work together in the future. The impact in terms of these aspects of increased resilience and improved opportunities is across a range of groups and is not limited to Groundwork North East & Cumbria.

For further information: <https://www.groundwork.org.uk/sites/northeast>



## London Borough of Waltham Forest

### 'Chestnuts House<sup>3</sup> Creative Centre Feasibility Study'



The 18th Century Grade II\* listed building, Chestnuts House, is one of the finest examples of Georgian architecture in the London Borough of Waltham Forest. Over time it has had many different uses including a private house, hospital, and training centre.

Since it closed following the Borough's relocation of its Adult Learning Services in 2008, it has fallen in considerable disrepair and was placed on the Historic England At Risk register in the summer of 2016.

London Borough of Waltham Forest received a Resilient Heritage Grant of £71,500 in 2017

for the "*Chestnuts House Creative Centre Feasibility Study*" project, which focused on establishing the historic and heritage significance of Chestnuts House, assessing the current state of the building, exploring viable business models to make it sustainable and resilient, and establishing a suitable governance model for the future.

The Grant had the following approved purposes:

- Commissioning a Statement of Significance, providing a thoroughly-researched history of the site and building.
- Contracting a Condition Survey, assessing the building's current state and identifying, prioritising and costing necessary repairs and restoration.
- Contracting a Community Engagement Consultant to undertake local consultation events, report on public perception and demand for the site, and ensure these views are represented in further development work.
- Undertaking a Business Feasibility Study, to produce a range of business options and models that could make Chestnuts House commercially viable.
- Commissioning a Governance Review, to explore the viability of a range of governance and legal structures.
- Creating a new Board, in accordance with the most appropriate model identified in the Review, with training then provided for attracted members.

The Chestnuts House Resilient Heritage Grant helped the London Borough of Waltham Forest and the wider community increase their understanding of the

<sup>3</sup> <https://walthamstowdiary.com/2017/10/29/chestnuts-house/>



buildings' heritage and its condition, with the aim of securing its future. The Project has resulted in the Council better understanding its challenges and plan for the future of the building.

The project identified business and governance models that will revitalise Chestnuts House, and in the long term improve public access, to enable it to become a sustainable and resilient heritage asset in the heart of Waltham Forest.



<sup>4</sup>A mixed-use governance model was identified, delivering creative workspace, a café with performance space, pop up exhibition space and events space. Areas such as the basement would be utilised for much-needed storage as well as workspace for businesses requiring little light. Public access would be concentrated on the ground floor on a day-to-day basis; however the building would be opened up to the public for Heritage Open Days or other events. The front yard could be enjoyed during activities such as pop up cinema, markets and performances, which would also generate an income.

Residents from across Walthamstow were involved in the consultation, noting the need for space for the community to come together and for creative workspace. As well as attending a number of consultation events, there was also an online consultation survey, and 120 residents and 47 businesses engaged with the consultation.

Businesses expressed support for the development of the building and the nature of the opportunities available. For example, artists and creative industries were particularly interested in basing themselves in the building, but they also gave recommendations for the other building functions that would be needed in order for it to be successful e.g. superfast broadband, café access and meeting spaces.

The project also involved Waltham Forest's Youth Advisors team, local young people who are fully trained and supported by the Borough's youth engagement services to 'youth-proof' development proposals and policy plans. This contributed towards the development of learning and heritage skills of young people and apprentices.

Training was delivered to seven young people to support the project in determining how heritage can benefit young people in the LB Waltham Forest, and support innovation. It provided those involved with practical skills and experience in local decision making and improving services.

As the project progressed, LB Waltham Forest felt it was too early to create a new board to guide the development of Chestnuts House, as public decisions about its

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<sup>4</sup> <https://walthamstowdiary.com/2017/10/29/chestnuts-house/>

future, and investment, had not been taken by the Borough's Cabinet. To address this, a shadow board was created during the Resilient Heritage project, to hold the Borough and its internal project board to account, particularly in terms of community involvement in the project. Once the London Borough of Waltham Forest has finalised its plans for the long-term future of the building, these governance arrangements will be harmonised.

The London Borough of Waltham Forest have gained a lot of learning from the project and has a much clearer idea about the way forward and how to realise the potential of the building, in a way that enhances its historic significance.

As a capital project, it reported directly to the Chief Executive on a monthly basis, raising Chestnuts House's profile with the Senior Leadership Team. The raising of the project's profile has also resulted in its inclusion in discussions about key projects for the Council. This can only increase the opportunities for the building to be better managed, more resilient and a viable future site.

As a result of the Resilient Heritage grant:

- There is greater awareness both corporate within London Borough of Waltham Forest and within the local community of the plans for and steps required to refurbish a listed building.
- Funding has enabled in depth research to determine a strategy for the building, all or parts of which can be adopted in the future.
- Local communities in Waltham Forest have been able to engage in its future.

Chestnut's House now has a long-term plan, and the London Borough of Waltham Forest has secured Greater London Authority funding to take forward the Business Plan in more detail. The building will play a key role in the Waltham Forest's London Borough of Culture 2019 activities.

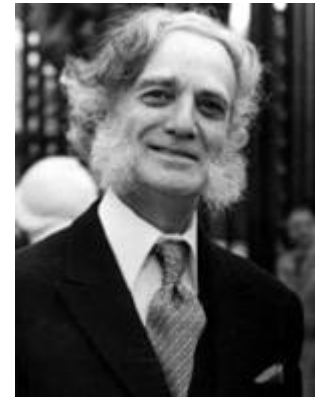
Whilst the London Borough of Waltham Forest has not yet finally decided whether to develop Chestnuts House and retain it, or establish a partnership solution to its future, the project has established viable options and a plan for the buildings use and restoration which can then be used for potential funding bids.

## Norman Nicholson Society

### 'Norman Nicholson House survey, feasibility study and concept development'

The **Norman Nicholson Society** received a Resilient Heritage grant for the project '**Norman Nicholson House survey, feasibility study and concept development**'. The Society was formed in 2006 with the aim of educating the public in, and promoting the works of, Norman Nicholson.

This project focused on the former home of the Cumbrian poet Norman Nicholson and sought to enable a **full survey, detailed costings, feasibility study and development of a concept** to purchase, renovate and extend the property. It also included a condition survey of the property.



The Society wanted to establish whether their ambition to buy and develop Norman Nicholson House was feasible, whether the ideas for the end-use of the house were viable, and to seek specialist input which would improve their own ideas. The Resilient Heritage grant allowed the Society to commission local architects to work on the project, and the architects selected had extensive experience of working on heritage properties.

The Society achieved the key (approved) purpose of the project – to carry out the preparatory work including a full survey, costings and feasibility study, and are delighted with the outcome of the project.

Specifically, the project achieved:

- A **professionally-drawn plan for the development of the house** which retains many original features and, with an eye to future sustainability, incorporates a new kitchen, a B&B facility, exhibition spaces, viewing space, and disabled access.
- An **account and evaluation of the historic interest** of the house which is of great value to the Society above and beyond this specific project.
- **Evaluation of the decorative elements of the house** which are rated as being "*of high significance*".

Members of the specific Working Group of the Society involved in the project have **received professional insights into the challenges and processes associated with such a project**. This will enable their judgements and decisions to be reached from a much more informed position as the Society looks to develop and deliver the Norman Nicholson House project.



In addition, **many local people, learning about the project through the profile it received** in the press, responded positively about the initial feasibility study project and expressed their hope

that the project would move successfully to the full application stage. The Society believes this is an indicator of the value placed on the property and Nicholson's legacy by the local community and is due in part to the power of promoting The Fund through the project and local press and media. The Society recognises that this notable increase in the public profile of the Society and their ambitions for the house is clearly due to the Resilient Heritage project.

As part of the process of the project, the Society made use of the **Resilient Heritage Strength Checker, which they found to be a helpful process** – it highlighted to the Society the need for expertise around accountancy and finance which they have now addressed.

Whilst the current status of the property changed during the project – with a new owner purchasing the house – this is regarded as a positive step by the Society as the new owner is sympathetic to the ambitions of the Society about the house. In addition, this **change of ownership was stimulated by the Resilient Heritage project itself** – so this positive step would not have occurred without the support of The Fund through Resilient Heritage.

Through using their Resilient Heritage grant, the Society recognises that the heritage is now **better managed**. Through the project, members of the Society have received professional insights into the challenges and processes associated with such a project which will **enable judgements and decisions to be reached from a much more informed position** as it looks to develop and deliver the Norman Nicholson House project.

Based on their experiences with the Resilient Heritage project, the Society identify a range of areas where they have **developed their skills** – including developing their experience of The Fund generally, specific experience around the Resilient Heritage processes, greater awareness of how architects operate, awareness of the role of specialists in property (such as experts in heritage properties), negotiating skills, communication and media liaison.

As a result of the project, the Society now feel they have '**fantastic knowledge about the property**', alongside an **improved confidence** in both the specific project about the house as well as the Society more generally. The project also helped to **engage the local community** in the project, **raising awareness** about the plans and **engendering local support**. All of this has improved the resilience of the Norman Nicholson Society.

For further information: <https://www.normannicholson.org/>

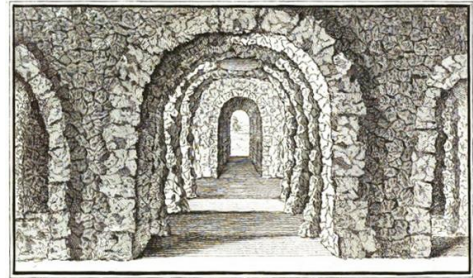


## Pope's Grotto Preservation Trust

### 'Discovering Alexander Pope's Grotto: the pilot project'

**Pope's Grotto Preservation Trust** received Resilient Heritage grant in 2017 for the project: '**Discovering Alexander Pope's Grotto: the pilot project**'.

The purposes of the Trust are to: Support the restoration, conservation and maintenance of Alexander Pope's Grotto in Twickenham; Promote interest in and knowledge of the Grotto and its significance in local and national history; and Raise funds in support of the above objects.



*A Perspective View of the Grotto.*

The Trust used The Fund's Resilient Heritage award to achieve a range of (approved) purposes:

- Recruiting a **Fundraising Consultant** to develop a fundraising strategy in consultation with the Trustees' fundraising team.
- Recruiting an **Audience Development** advisor to develop an Audience Development Plan working with 4 new volunteers, undertaking research with the public at 3 Open Days.
- Undertaking a **digital survey of the grotto** to create a tool as a basis for logging investigative findings and for future use in presenting the grotto.
- Appointing a **Conservation Consultant** to map the location of all defects in the chamber and undertake some investigation to establish areas of the floor that should be included in later works, and some trial cleaning of mineral surfaces.
- **4 visits by the Geological Society of London History Geology Group** to investigate and identify the minerals.
- Undertaking a **lighting options appraisal**, investigating the feasibility of wiring and lighting positions within the grotto, resulting in a model for the South Chamber.



The Trust used the **Resilient Heritage Strength Checker** and found that it helped to inform their Resilient heritage grant application, and that it was a '**sensible way to review**' aspects of the Trust, although given that the Trust is entirely voluntarily run, **some aspects of the Strength Checker were not relevant**. Going through the Strength Checker process also helped to develop a more collegiate and collaborative approach that underpins the activities of the Trust – this was supported by both the Strength Checker and the overall Resilient Heritage process.

**Audience Development** was a key aspect for the Resilient Heritage project – and as a direct result of the project, the Trust has discovered what visitors’ value about Pope’s Grotto, what their visitor experience has been, and what can be done to improve the visit.

The Trust expects that the **Activity Plan** developed through the project will contribute to the strengthening of the organisation through partnership working with key cultural and heritage organisations, ensuring the Trust strengthens capacity to deliver and raises the profile of the project in the local community through widening participation in the project activities.

As well as demonstrating the reasons for supporting the conservation of the Grotto, and the associated activity plan, the **Fundraising Strategy** has a detailed action plan based on trusts and foundations that have been researched in detail as real prospects for supporting the Trust’s fundraising campaign. This plan will seek to reinforce and strengthen the financial resilience of the Trust to carry out the objectives.

As a result of these improvements, the **Trust considers that Pope’s Grotto is in a much stronger position for the long term**, through greater knowledge and understanding of the heritage, a stronger financial position through the implementation of the fundraising strategy and action plan, and through raising the profile of the project and engaging new audiences, the project will be more likely to be successful.

**Pope’s Grotto Preservation Trust** have used their project to carry out a range of activities that have all **supported better management by improving the knowledge and understanding of trustees about the heritage asset** – including developing a fundraising strategy; an audience development plan; a digital survey of the grotto; mapping the location of defects in the chamber; and other investigative work.

The project also helped the Trust to **enhance the skills of existing trustees**, as well as **furthering and advancing their knowledge**. In addition, the Trust **initiated a process of recruiting new trustees** to help address skills and knowledge gaps within the Trust, thereby **widening the capacity of the Trust**. In addition, the Trust also **recruited around ten new volunteers** as a result of the pilot project.

As a result of the activities and improvements supported through the project, the **Trustees consider that Pope’s Grotto is in a much stronger position** for the long term, through **greater knowledge and understanding of the heritage, stronger financial position** through the **implementation of the fundraising strategy** and action plan, and through **raising the profile** of the project and engaging new audiences.

The Trust feels that it has benefitted enormously from the pilot project – and a **key underpinning aspect is the confidence that it has given to the Trust**.

For further information: <https://popesgrotto.org.uk/>

## Shambellie House Trust

### Developing Shambellie House for workshops and residential courses on photography, arts/crafts, history, environment and wildlife

In late 2017 **Shambellie House Trust** received a Resilient Heritage grant for the project: '**Developing Shambellie House for workshops and residential courses on photography, arts/crafts, history, environment and wildlife**'.

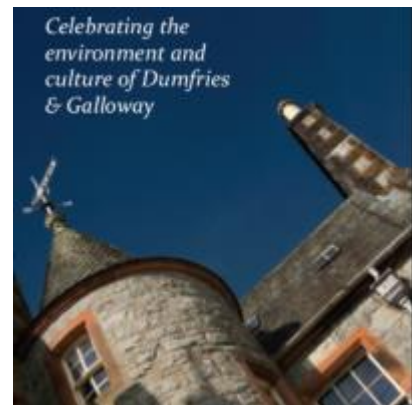


Shambellie House Trust's objectives are to:

- Arrange for the buildings and grounds to be used for the advancement of arts, heritage and culture. Providing facilities for the arts and providing heritage benefit to the community by preserving the listed building of Shambellie House (including any outbuildings or associated buildings and grounds).
- Arrange for the buildings and grounds to be used for the advancement of education, in particular arts, culture and the environment.

The approved purposes of the Resilient Heritage grant for the '**Developing Shambellie House for workshops and residential courses on photography, arts/crafts, history, environment and wildlife**' project were:

- To build the capacity and resilience of Shambellie House Trust, prepare for the transfer of ownership of the property from the Scottish Government and create a sustainable plan for conversion of the site into a centre for courses and workshops.
- To commission architects, engineers and quantity surveyors to cost out a programme of capital work and repairs to the house and gardens.
- To commission market research on the residential learning market, comparators and competitors.
- To undertake a programme of Board development and training.
- To undertake 10 facilitated community skills workshops.
- To produce a business plan for the future of Shambellie House.



In order to achieve these objectives, the Trust appointed an external consultant to work with them on the various strands of work outlined above, and also commissioned specific studies and plans for each of the key strands of work.

The Trust feels that the external project organiser (Piotr Bienkowski) was 'the making of the project' – providing the support and management which was precisely what the Trust needed at that stage of the project's development. He

helped to take the Trust from the idea/concept of the project to the development of the project.

All of the objectives of the project have been met, and **the Trust now feels in a far stronger position to move forward to the next phase** of the development of the project.

The project enabled the Trust to **improve and strengthen its board and governance** arrangements; **improve its understanding of the market** for the delivery of workshops and residential courses; to **develop a detailed understanding of the potential product development** – including the realisation that 640 days of courses could be delivered by tutors engaged in the community skills workshops (which was the ‘tipping point’ for the Trust to know that the project could work) and gave them the confidence to continue to move forwards with the development of the project; **develop an outline plan and costings** for the capital work; and develop a **detailed business plan** which the Board has taken ownership of, and are fully signed up to delivering.

In terms of the outcomes achieved, the work that will lead to **better management of the heritage includes the production of a Business Plan for the future of the House, building on the various** other strands of work (outline plans and costings; market research; programme of board development; and community workshops). The Plan has **helped the Trust to move from ‘idea’ to ‘development’** – and they now believe they have a comprehensive, robust, detailed plan covering all aspects of the ambitions for the House.



**Shambellie House Trust** made notable progress in terms of skills development, especially for their trustees, undertaking a **programme of board development and training** as part of their project, including a **skills audit**, and as a result now have a stronger board. The Trust has **recruited new trustees** to the board, **expanding the skillset** of the board – sending trustees on tailored courses to develop particular skills, addressing gaps in expertise and knowledge, and now feel that they have a very strong board with the correct mix of people involved.

With the **completion of the five strands of work** supported by the Resilient Heritage grant, the **Shambellie House Trust is now resilient** and has a **good evidence base** and is in a **position to apply for capital funding**. If successful, the Trust will commence discussions with the Scottish Government concerning the transfer of ownership of Shambellie House from the Government to the Trust.

The Trust is currently revising its plans for the redevelopment of the House, based on feedback from an unsuccessful application to The Fund for the capital costs of the redevelopment. The ambition in terms of delivery remains the same, and the Trust is currently considering how it could achieve this more efficiently in terms of the costs of capital redevelopment.

For further information: <http://shambelliehouse.org/>



## The Bishop's Meadow Trust

### The Bishop's Meadow Trust: Undertaking surveys to strengthen knowledge for future planning and management



The Bishop's Meadow comprises 34 acres of ancient floodplain meadow close to the centre of Farnham, Surrey. Floodplain meadows are a declining habitat in England.

The Bishop's Meadow Trust, established in 2009, appealed to Farnham residents to help purchase the land when it came on the market for sale to protect it for future generations. Having done this, the Trust is now focussed on land management to restore the Meadow and increase its biodiversity.

The Bishop's Meadow Trust aims to restore the land as meadow land, to ensure that it remains a sustainable

green environment for the people of Farnham and to actively protect existing flora and fauna while encouraging further wildlife to colonise the Meadow. The Trust is committed to seeking the engagement of the people of Farnham and to work with volunteers (young and old), schools and youth groups. The two main aims of the Trust are:

- To promote the conservation, protection and biodiversity of the natural environment of the meadow and the creatures which depend upon it.
- To maintain and enhance a semi-natural wild space for all in our town to experience and enjoy a greater diversity of British wildlife.

The Bishop's Meadow Trust received a Resilient Heritage Grant of £9,500 in June 2017 for the "**Undertaking surveys to strengthen knowledge for future planning and management' project**", matching it with £1,000 of the Trust's own resources. The Grant had the following approved purposes:

- Commission Surrey Wildlife Trust to carry out a range of surveys on the Bishop's Meadow site including a National Vegetation Classification re-survey, Invertebrate Survey, Bat, Reptiles, Birds and Mammals Surveys.
- Create opportunities for Trust members and wider community volunteers to support the survey work and develop skills and knowledge of both this aspect of work and in data interpretation.
- Work with Surrey Wildlife Trust to create education packs and engage local schools to develop and increase their understanding of the site.
- Develop a new sustainable Land Management Plan based on the survey data with a longer term aim to implement and create improved bio-diversity and better management of the site.

The project aimed to strengthen the knowledge and capacity of the Trust to maintain and improve the Meadow by contracting professional advice from the Surrey Wildlife Trust (SWT) to guide long term planning and management of the Meadow. A range of wildlife and flora surveys were carried out, the results of which fed into the Land Management Report and Plan

Some volunteers were involved in the evidence gathering process, learning how professional wildlife surveys are conducted and gaining experience in species identification.

The resulting 10-year management plan set out a vision for the Meadow in 2027:

- A healthy eco-system.
- A beautiful and varied landscape.
- Stunning views.
- Tranquillity and peace.
- Preservation of a part of the local history.
- Recreation.
- Education.



The development and production of the report by SWT has resulted in a land management plan that the Trust, its trustees and its members are fully signed up to, setting out how the biodiversity of the Meadow will be improved, and how greater engagement by communities in Farnham, and young people, will be achieved.

The activities that resulted in the production of the report also increased the capacity and capability of the Trust to manage the Meadow, and whilst changes to the Meadow itself may not be noticeable for several years, the Trust reports positive changes in the vision, approach and composition of the Board of the Bishop's Meadow Trust.

Following the completion of the survey work, a member of the SWT team has joined the Board, reinforcing the partnership and improving the ecological expertise of the Trust in delivering the plan.

Now that the Trust has established a baseline in terms of what lives and grows on the Meadow, and the areas that are favoured by different species, it will be possible to monitor change by carrying out future surveys and comparing the

results. This can also inform educational material for all, and visitors will have the opportunity to learn more.

In 2018, a part of the Meadow was grazed for the first time in living memory to increase the structure of the grassland and encourage a better diversity of wildflowers and grasses.

The project has provided the Board with a clear plan to follow, resulting in improvements in confidence and vision and a willingness to plan and fundraise for the long term.

The Resilient Heritage Grant has helped The Bishop's Meadow Trust transition from focussing on securing the short-term survival of the Meadow to planning for its long-term future. As a result, the Trust has built capacity and become more ambitious, unified a credible plan and evidence base that all Trustees and partners are signed up to. As a result, the Trust is now focusing on fundraising for land management and development rather than to secure the Meadow, and improved partnerships have been formed with Surrey Wildlife Trust, schools, community groups and local businesses.

The Trust feels it has reached a stage in its development when it has begun to look to and plan for the longer term rather than respond to the here and now. The grant received from the Heritage Lottery Fund was instrumental in helping this to happen by providing external professional inputs in terms of surveys and a 10-year land management plan.

The Board now has the information required to prepare a longer-term plan and budget, gain further support from its membership and hopefully increase its funding streams. The Trust is already attracting new people with relevant expertise to its Board improving overall governance.

The Trust has reviewed and restructured its membership, which is more active as a result, and its profile within Farnham has significantly improved. It is recognised as a site of importance for nature conservation and is involved with wider initiatives (such as guided walks as part of Farnham's Heritage Open Days, and through its links to the Castle and to the Bishops of Winchester).

The links between the Bishop's Meadow Trust and the Floodplain Meadows Partnership are growing and with a more evidence-based approach to land management, the BMT has the chance to share its experiences on a wider geographical scale.

Finally, the Trust felt that the Resilient Heritage Strength Checker highlighted those areas where improvements should or could be made.

For more information on Bishop's Meadow, and on the work of the Trust, please see: <https://www.bishopsmeadowtrust.com/>

## The Guild of St Mary's Centre Lichfield

### **Museum and Education revitalisation, introduction of relocated library, Training, Governance and finance planning**

St Mary's Church, Lichfield in its current form was built in 1870 and is a Grade II\* listed building. It was remodelled in the early 1980s to include community space, a coffee shop and Lichfield Museum, with the Church opening occasional services in a Chapel at the northern end.

However, by 2016 St Mary's was running at a substantial loss. With visitor numbers circa 3,000 per year and displays that were over 30 years old requiring refreshing and reimagining, the Trustees of the Guild of St Mary's wanted to look at redeveloping St Mary's to generate more income, increase visitors and become more sustainable.

St Mary's received a Resilient Heritage grant of £38,500 in 2017 for "*Undertaking surveys to strengthen knowledge for future planning and management*" project. The grant had the following approved purposes:

- Review current Governance Structure and protocols for the organisation.
- Prepare a partnership plan to better understand current and potential partners.
- Carry out audience development work to capture the views of users and visitors and understanding current usage of the archives and future access.
- Write a business plan which will explore means of revenue generation.
- Undertake a space planning and design exercise. This will aid how to redevelop the internal space so that it is more flexible, attract greater footfall and expand the learning programme to engage new and diverse audiences.
- Review the volunteering strategy to identify current skills gaps and training needs.

The Resilient Heritage grant helped St Mary's prepare a series of documents to plan for the long-term future of the building and its collections and make the case for investment in the Church.

The Business Plan set out the direction for St Mary's for the following five years, taking a consultative approach to address resistance to change but consensus that past operations were not sustainable.

The vision for the building that emerged focussed on increasing activity and footfall, and included Lichfield Library moving into the ground floor, and the development of a multi-use performance, meeting and exhibition space on the first floor.

The role and function of Lichfield Museum was reviewed, and the collection is currently in storage. A detailed interpretation plan as part of the Resilient Heritage project has been developed, which recognises the opportunity for the Museums to interpret St Mary's as a building as well as artefacts. The plan integrates the Museum on the first floor to include both permanent and temporary exhibitions,



along with a separate research room for the extensive photographic collection held by the Trust.

A governance report informed St Mary's that Trustees need to be more proactive and work in a different way, and a skills audit resulted in trustee applications from new and existing trustees.

As part of Resilient Heritage project, the Trust's charitable purposes were updated to reflect the new vision for the Centre. The revitalised Trust aims to ensure that its heritage and arts programme will be accessible to all. St Mary's want to encourage young people to take part in creative learning opportunities, forge partnerships with schools, colleges and offer opportunities for nurturing new talent through its commitment to artist development.



The Trust has a new Mission Statement to reflect its new vision: *"To make St Mary's the beating cultural heart of Lichfield's community, building aspirations and skills through engagement with the City's vibrant history and the arts".*



Subleasing the ground floor of the building to Staffordshire County Council to provide a new relocated library for Lichfield provided a great opportunity to take forward the Resilient Heritage grant funded plans to restore the building and significantly improve footfall. This provides income to secure St. Mary's for the long term and expand and develop its popular education programme with local schools.

As a result of the plans supported by Resilient Heritage funding, St Mary's in the Market Square was redeveloped during 2017 and 2018 to hold the City Library on the ground floor, completely revamping the first-floor to include a lift to allow all user groups to access the facilities, creating a 140-seater performance area and multi-use, cultural space with photographic archive & gallery area plus access to digital local records.

[BBC News covered the reopening with a feature in December 2018](#). Over 13,000 visitors came to St Mary's in the last two weeks of December and over 27,000 in January 2019, and the Trust is actively recruiting new volunteers. The Library has had more than 500 new members since opening.

The development was supported by a range of funders, including local authorities, trusts, foundations and charities, performance development partners and an active friends' group, and volunteers.



The Trust is now looking to implement the museum interpretation plan and develop a catering offer that fits with and complements its revitalised role.

Programming at St Mary's includes comedy and classical music performances to date (for details see <https://stmaryslichfield.co.uk/whats-on-booking/>), with highlights including a performance of "And This is My Friend Mr Laurel" with Jeffery Holland, written by him and Gail Lowe, and a full programme

of 'Lichfield Live @ St Mary's' classical concerts.

For more information please see: <https://stmaryslichfield.co.uk/>