Organisational sustainability and resilience good practice guidance

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See all updates

Organisations that are sustainable and resilient are better able to adapt to changing circumstances and take advantage of new opportunities, leading to greater impact and stronger legacies for heritage projects.

By reading this guidance you will be prompted to think about the factors that influence the sustainability of your organisation, what needs to change and what you might want to factor into your project. It also includes links to further information and resources.

Organisational sustainability is one of the four investment principles that will guide all our grant decision making under Heritage 2033.

A sector that is adaptive and financially resilient, with sufficient skills and capacity, helps encourage new investment in heritage and brings benefits to communities and economies.

Organisational sustainability is an important part of making the heritage at the centre of your project more resilient. It enables organisations to achieve more, plan for and confidently navigate change.

How to think about sustainability

Sustainability and resilience will look different for different organisations depending on individual needs and the heritage focus of your project.

It can be helpful to think about the factors that influence your organisation's sustainability to better understand the relevant elements to prioritise for your project.

You might need to acquire new skills or knowledge, explore new models of operation or governance, consider help from external consultants or review your approach to income generation.

- **Finances and strategy**: review and develop your fundraising plans to diversify income sources and create a longer-term plan for your organisation, research audience and heritage needs and bring people together to develop a clearer strategy for your future.
- **Human resources**: analyse the skills, abilities and capacity of the people you need to make your project a success, including staff, volunteers and key dependencies such as any expert external advice.
- **Systems**: does your organisation have the governance and decision-making approach required to make the most of your project? Can you manage, lead and communicate effectively to achieve your desired impact?
- **Built environment and infrastructure**: is the physical and digital infrastructure required for your project sound and fit for the future? As well as the heritage focus of your project, you might consider things that are vital for your organisation and audiences' ability to engage, like transport, energy and the supply chains your organisation relies on.

- **Social networks**: what do you need to ensure you have the networks, communication and trust with your audiences and stakeholders to make a success of your project? Will your project require new relationships to be formed and managed?
- **Professional networks**: developing networks, partnerships or other collaboration strategies with peer organisations with similar goals and challenges enables the sharing of expertise and resources.
- **The environment**: how can your project reduce negative environmental impact and support your heritage to adapt to the climate crisis?

With an understanding of your organisation's current situation – your strengths and weaknesses – and how it has developed, you will be in a good position to plan how you can improve your organisation's sustainability through your project.

Inspiration

The following list sets out broad examples of the type of development work that might be relevant to your organisation. It is not an exhaustive list of what we can fund – it's intended to provide inspiration to get you thinking about what might be appropriate for your circumstances:

- Acquire resources, skills and capability to address identified gaps in your organisation's resilience and sustainability.
- Progress the early stages of a project development, including options appraisals, feasibility studies and consultation.
- Undertake organisational development as part of a project with a broader purpose to maximise the impact and sustainability of that project.
- Explore and establish consortia and peer support within a group of organisations with identified common challenges, which might involve networks, partnerships and new strategies to collaborate.
- Increase the skills and capacity of organisations who own and manage heritage sites and assets.

Our Heritage 2033 strategy is based on a flexible framework of investment principles designed to allow you to develop projects with a focus that is right for your organisation and heritage. We recommend you discuss your individual circumstances with your local Heritage Fund team before applying.

More information and resources

Business plans

Our business plan good practice guidance takes you through developing and writing a business plan for your project step-by-step.

Digital skills

Explore the resources produced through our Digital Skills for Heritage initiative which can help heritage organisations get the most out of digital and understand the foundations of working online, from security and safety to accessibility and AI.

To increase your project's impact and reach, we require any digital outputs you produce to be available, accessible and open. Find out more about open licencing in our digital good practice guidance.

Strategy and planning:

- NCVO's guidance on strategy and business planning
- Nesta's DIY Toolkit on how to invent, adopt or adapt ideas that deliver better results
- Arts Council England's business planning guidance for arts and cultural organisations
- Business planning resources from the Scottish Council for Voluntary Organisations

Business development support:

- Rebuilding Heritage resources on topics including fundraising, communications and business development
- Business development resources from Culture Hive (hosted by the Arts Marketing Association) covering topics including managing teams through change, measuring social impact and diversifying revenue streams
- AIM's success guides for museums cover subjects including cafes and retail, negotiating business rates and donation boxes

Fundraising:

- The Fundraising Regulator's code of fundraising practice
- Association of Fundraising Professionals ethical standards and principles
- Northern Ireland Council for Voluntary Action's resources to help with fundraising
- Top tips and how tos for fundraising

Governance:

- AIM's golden rules for good governance for boards of trustees
- The Charity Governance Code
- Toolkits and guides from Scotland's Third Sector Governance Forum

Social investment:

- Good Finance helps charities better understand social investment
- Explore Social Investment Scotland's investment readiness tool