ERS
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Heritage Places Strategic Initiative: Interim Evaluation Report Year One

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Quality assurance

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Executive Summary

What does the Heritage Places Strategic Initiative aim to achieve, why and how?

The Heritage Places Strategic Initiative (the 'Initiative') is a £200m, 10-year (2023-2033) investment in up to 20 'Heritage Places' across the UK. It responds to an evolving strategic context which recognises that place-based regeneration, inclusive economic growth, boosting pride in place, and heritage and cultural engagement are increasingly important components of public policy. The Initiative is one of several, targeted initiatives which address 'place' in the Heritage Fund's strategy, Heritage 2033, and it seeks to centre heritage in local placemaking to deliver long-term, place-based transformation through achievement of four aims:

- Increasing pride in place in local areas and connecting communities and visitors with heritage.
- Maximising the capacity of local heritage to contribute to places and communities.
- Creating integrated and holistic schemes across the breadth of heritage.
- Taking a people-centred approach enabling everyone's heritage to be recognised.

The Initiative builds upon prior experience from place-based programming at the Heritage Fund, including the 2019-2024 Areas of Focus programme, that demonstrates the added value of taking a targeted approach to place. By providing flexible, longer-term investment across the breadth of heritage, and encouraging collaboration locally to identify and solve place needs, the approach is expected to increase the impact and sustainability of local heritage.

The selection process for the first nine Heritage Places (the 'Places'), via a newly created Place Index, considered the balance of need, opportunity and potential in local authority areas. Whilst the Initiative intends to contribute to all four Investment Principles in the Heritage Fund's strategy, heritage condition received an additional weighting in the Index, reflecting an expectation that the Initiative will contribute significantly to the Saving Heritage Investment Principle. The selection process also included a deliberative stage, incorporating the insights of key stakeholders to reach a final decision on the selection. Up to 20 Places will be established in total, the remainder in Tranche Two.

The Places represent a mix of urban, rural and coastal local authority areas, and a spread across England and the devolved nations of the UK. In two of the Places, designation as a Heritage Place follows on directly from the conclusion of the Areas of Focus[1] programme in these areas.

Over the period of the first Heritage 2033 delivery plan from 2023 to 2026, the Initiative will be implemented in stages, led by a 'lead organisation' in each Place, and with support from the Heritage Fund's area and country teams. All grantmaking will be undertaken through the Heritage Fund's Grants for Heritage (the open programme).

- In 2023/24, £3m for planning and capacity building to develop scheme plans collaboratively with local partners and stakeholders.
- In 2024/25, £20m deployed through a range of funding mechanisms, with each Place encouraged to bid for a £250k 'development phase' grant for project planning, capacity and engagement work.
- In 2025/26, £30m in 2025/26 for delivery of projects and schemes.

What does the Initiative evaluation seek to find out, and how will it be delivered?

The evaluation will establish a framework for measuring the long-term impact of the Initiative up to the end of the current strategy period in 2033, which will be delivered collaboratively by the independent, Initiative evaluator (ERS Ltd.), together with local evaluators and partners in the Heritage Places, and the Heritage Fund's Business Insights team.

The evidence collected through the evaluation will answer a series of research questions posed by the Heritage Fund at the outset of the Initiative. These concern the impact of the Initiative but also how these

[1] A programme which invested in 13 places between 2019 and 2024, that had historically received lower levels of investment from the Heritage Fund and displayed the highest evidence of need based on data from the Index of Multiple Deprivation Areas of Focus | The National Lottery Heritage Fund

impacts arise, including the influence of both the local context and the Initiative's design on delivery approaches and outcomes across the Heritage Places. An Initiative-level Theory of Change has been produced - collaboratively with the Heritage Places - to guide evidence collection, and is set out alongside the evaluation framework at Annex A: Evaluation Design.

Key findings from the evaluation of year one about the Initiative's rationale and design

The strategic rationale for the Initiative remains robust. Despite the change in government and the increased fiscal and economic challenges facing local authority areas since the Initiative's inception, the rationale for a place-based response from the Heritage Fund remains strong. Further evolution in the respective placemaking roles of local and regional government only serves to underline the urgency and importance of the strategic activities underway in the Heritage Places. These activities will serve to develop a vision for local heritage and build sector capacity and infrastructure, which in turn strengthens the profile and position of heritage in local decision making and placemaking.

The deliberative aspects of the selection process are vital. It is the nuances in the local place context which have been most influential, in year one, in determining readiness locally to implement a place-based approach to heritage. There is much variation locally in the choice, and strength, of local policy frameworks which are perceived to best fit place ambitions for the Initiative. There are also differences between the Places in the quality of local partnership working, and the extent to which the heritage sector is sufficiently networked and capable for Places to launch an inclusive, equitable, collaborative approach to Heritage Places, and at pace. The dynamics of local politics, particularly in rural and polycentric areas, are also key influences on early delivery. These place factors cannot be measured and appraised without in-depth discussion in the Places, and the 'human' element of the selection process was regarded as a crucial exercise to ensure selection of the 'right' Places, alongside the Place Index.

The 10-year timeframe is regarded as the Initiative's strongest design feature. Described as 'thought leadership' by strategic stakeholders and a 'catalyst' for strategic development by the Places, the 10-year timeframe is providing an unprecedented opportunity in the Places to explore and address the 'root causes' of longstanding heritage issues in local areas, and to generate novel evidence and learning on how investment in heritage can generate impacts over the long term.

The Initiative is encouraged to explore a range of leadership models. There are notable advantages to working with local authorities on place-based heritage programmes, including their capacity to manage investment at scale and their statutory planning functions. However, strategic stakeholders cite successes from other heritage placemaking programmes that show the potential, and benefits, of community and third sector leadership, particularly in mobilising the grassroots community and heritage sectors.

Whilst there is limited evidence from Tranche One of the advantages of different models of Heritage Places leadership, the example of joint leadership in Glasgow also suggests some early benefits from the combined resources and expertise of the two lead partners. These encompass enhanced bid writing capacity, and the increased capability of two partners, each with distinct expertise and roles, to progress the short and longer-term objectives of the initial, development phase concurrently, and at pace.

Flexibility in the aims and design of the Initiative are not matched in the grantmaking process. The application process for the development phase of the Initiative has received a mixed response from lead organisations. Two thirds report few challenges, however the remaining third report a mismatch between the exploratory aims of this phase and the more rigid requirements of the funding mechanism. Some report challenges adapting to emerging insights from this phase, when the funding requires delivery plans to be mapped out for the full term of the award. Others felt the Investment Principles did not provide a suitable framework for articulating aims and plans for this phase. Longer-term, less prescriptive development funding was recommended by some Places to allow a more dynamic strategic phase, that can better respond to the incoming intelligence gathered from communities, partners and stakeholders.

Key findings from the evaluation of year one about the delivery, progress and success of the Initiative

The nature of year one grantmaking, activities and progress in the Heritage Places is in step with recommended practice in place-based working as well as guidance produced by the Heritage Fund. Place-based programmes typically include an exploratory phase, where 'root issues', local

systems, needs and solutions are explored collaboratively, and equitably, with partners, stakeholders and communities. This aligns with the purposes outlined by the Heritage Fund for the 'development phase grants', which are underway to varying degrees in eight of nine of the Places.

Lead organisation consultees indicate a desire for this exploratory work to go beyond the 'usual suspects' in the heritage sector, expanding further into the grassroots heritage community. This scale of engagement has not been possible before, under shorter funding programmes, and reflects the nature of local visions and ambitions for Places.

Lead organisations and area teams are satisfied with the progress that's been made in year one in relation to these strategic and sector-orientated aims. The more collaborative outlook on the ground, among the heritage community and via improved working relationships at officer and leadership levels within the local authority and with heritage organisations, is cited as an early indicator of success.

The date development phase awards were approved and the length of these awards varies substantially across the Places. Taken at face value, these Tranche One timeframes are indicative of the expected range in the timeframes required to reach a position of 'readiness' in Places, and to develop specific schemes and projects. However, the Heritage Fund is recommended to consider the extent to which this local variation reflects a locally sensitive response to Place by the Heritage Fund, or whether it is less intentional. The Heritage Fund might consider providing clearer and more consistent guidance to lead organisations on timeframes in which to develop and deliver the development phase grants.

The whole local authority area remains in scope in the majority of the Places. This broad scope necessitates significant time to reach agreement locally on priorities and plans for Heritage Places, particularly in rural and polycentric areas, and particularly when this is coupled with high levels of heritage need. However, in two of the Places, the lead organisations have narrowed their focus to particular settlements or districts. Heritage need is still relatively high in both these Places (in terms of their ranking in the Place Index), but a smaller geographic scale is instilling more confidence in the lead organisations that they can address these needs over the long-term, in collaboration with partners and communities.

Balancing short and longer-term aims of this development phase is challenging, but emerging as a priority in the later stages of year one. Some lead organisations, particularly those who are further into delivery, are starting to rebalance the short- and long-term objectives of this phase. They report a stronger focus towards the end of year one on developing capital proposals and early 'wins' for heritage assets and sector development, alongside delivery of strategic activities which position their Places for long-term success. This reflects a sense of increasing expectation from the Heritage Fund to see tangible impacts, but also chimes with strategic stakeholders call to get capital projects in the pipeline quickly, to ensure that social and economic impacts from these investments materialise before the end of the Initiative.

The administration of seedcorn grants by lead organisations is proving demanding in some of the Places, and soaking up capacity that could be directed at longer term scheme planning. Community Foundations in local areas could be approached to explore alternative mechanisms for the management of such grant programmes in local areas, to protect lead organisation capacity.

Progress in the former Areas of Focus has benefited from this prior investment. Existing posts have been extended in some Places, bypassing recruitment delays seen in some of the other Places. Mechanisms for developing and coordinating the heritage sector have also been established and embedded in these Places through five years of Areas of Focus. Strategies are also in place which can guide priorities and projects under Heritage Places. This highlights the resource and time required to build infrastructure for heritage-placemaking, and the risks of shorter-term revenue funding for key staff posts in the lead organisations. It also contextualises the progress made in year one in the other seven Places.

Success in year one is defined locally by strategic wins, but definitions of success differ within the Heritage Fund. Whilst lead organisations and area teams typically cite strategic impacts as indicators of year one success, there is an expectation at Board level that Places would be further along in delivering activity to improve the condition of individual heritage assets. Either as part of the package of activities for their development phase grant or via an additional grant, some lead organisations have been awarded funding for feasibility studies and options appraisals for specific assets during year one. In other Places, wider local partners have been awarded project delivery grants and resilience funding. The

Heritage Fund is recommended to reflect on expectations at different stages of the Initiative and learning from year one, to consider under what circumstances partners in the Places should be encouraged and supported to progress project grants alongside their development phase activity.

Budget allocations in year one were much higher than actual expenditure, and the budget profile over the 10-years should be revisited. Up to the end of December 2024, the Heritage Fund has invested £3,492,456 in 2023/4 and 2024/5 against a budget allocation of £23m for the two years, up to end March 2025. This illustrates a disparity between expectations at the Initiative's inception compared to actual investment and delivery in the Places to date. The various influences and challenges in local implementation are unlikely to account completely for this variance. This suggests that Initiative grantmaking performance reflects a combination of implementation and intervention challenges i.e. that budget allocations were not profiled realistically across the 10-year period and should be reviewed.

Key findings from the evaluation of year one about the influence of local context on the Initiative

Understanding local context is especially important in place-based evaluations, and is central to the rationale for place-based working. Differences in context and its interaction with funded interventions can describe variation in 'starting positions' for the Places, and generate learning for the Heritage Fund regarding optimal conditions for place-based investment, as well as the nature and scale of outcomes.

Local policy context for Heritage Places is highly nuanced, and steers the focus of year one activities. In two of the Places, the Initiative is viewed as a route to achieving social and economic regeneration goals, and the Initiative is framed within local regeneration plans. In the majority of Places, partnership strategies for culture, heritage and creativity provide the key policy framework for Heritage Places, however the extent to which these are regarded as fit for this specific purpose varies from Place to Place. The backbone of year one activities in three of the Places is the development of a distinct heritage strategy, while in others, this strategy work has not been deemed necessary and/or desirable in the presence of wider local, cultural strategies. This highlights the importance of dialogue with prospective places for Tranche Two around policy fit, and the need for heritage strategy development.

Polycentric and rural areas face added challenges and complexity. Alongside the complexity of reaching agreement on priorities across town and parish councils in these areas, lead organisations also report some inevitable and understandable parochialism within their heritage communities. These local place attachments need to be recognised and validated, as well as the additional time and resource demanded of lead organisations and area teams involved in brokering agreement in such contexts.

Capacity in the heritage sector, its infrastructure, and relationships between the sector and the local authority serve as key influences on delivery approaches in year one. Specifically, the extent to which smaller, grassroots organisations are capable, and can access the existing sector mechanisms in place to engage with planning for Heritage Places. Where mechanisms are already in place to reach the grassroots level, Places can mobilise an inclusive, equitable, collaborative approach more rapidly. However, all Places identified continued demand for capacity building activities to meet the ambitions of the Initiative. More intensive engagement is also needed in Places where lead organisations report ongoing, reputational challenges with communities and stakeholders they seek to engage.

Progress towards the development of specific schemes and projects depends upon emerging heritage priorities, target audiences, and the scale of heritage need. The scale of built heritage need locally is emerging as a key factor in determining how quickly specific schemes in Places are expected to come forward, as well as expertise and capacity within the local authority to explore diverse community and cultural heritage, where this is emerging as a priority for Heritage Places. The socio-economic, age and ethnic composition of local areas is also influential in determining both heritage priorities, and the extent to which established approaches, mechanisms and partnerships are deemed fit for purpose to engage different groups in the community. Where not already established, additional investment to prepare for inclusive, equitable and culturally responsive engagement of these communities is required.

Capacity in lead organisations is a barrier to delivering at scale and contributes to the focus on sector development and infrastructure in year one. This is not expected to abate in the future, and is particularly challenging in Places where the geographical scope of the Initiative remains broad, across the

whole local authority area. In most Places, lead organisations are therefore keen to build capacity throughout the wider sector so they can facilitate, as opposed to lead, the Initiative over the longer term.

Lead organisations with more experience of joint working across local authority departments and with external partners regard this as key to year one progress. The extent to which Places have experience of partnership and place-based delivery for heritage has contributed to how quickly Places can resolve the roles and responsibilities of partners in the Initiative. Within the lead organisations, close working and alignment between the local authority's culture, heritage and regeneration teams prior to the Initiative is regarded as a key factor in progress, quality, and success of the approaches taken.

Prior grantmaking in the Heritage Places, coupled with the insights from lead organisations and area teams, indicate the contextual factors that are most influential in year one. It is still early in the delivery of the Initiative and only nine of the (up to) 20 Places have been onboarded. However, analysis of data on local context for Tranche One highlights the different 'starting points' in the Places that appear to most influence delivery approaches during year one. Namely, the scale of prior experience in relation to:

- Project delivery for intangible, community and cultural heritage, and collaborative approaches to working with a range of local communities and community organisations to explore their heritage.
- Place-based project delivery, and delivery of heritage placemaking schemes via the programmes of other cultural, heritage and place funders.
- Partnership project delivery, and the strength and breadth of working relationships within the local authority, and with the grassroots heritage community.

Of the four factors in the Place Index, testimony from the Places suggests that 'Heritage Condition' and 'Previous Heritage Fund Investment' exert the most influence on delivery in year one. Heritage need, as indicated by 'Heritage Condition', was cited often by area team and lead organisation consultees in terms of the local challenges to agreeing priorities. This appears to present a greater challenge in Places which are polycentric, and those which remain at a local authority scale.

'Previous Heritage Fund Investment', whilst used as an indicator of need in the Index, also serves to indicate the strength of relationships locally with the Heritage Fund, and familiarity with its grantmaking. Where Places have historically received lower levels of investment from the Heritage Fund, navigating roles and responsibilities has proven more challenging. As well, area teams who are less well known to lead organisations have invested more time in establishing, or developing, those key relationships.

The Initiative has been well targeted at local areas where there is opportunity to increase pride in place. Levels of pride in place and place attachment are measured by different indicators across the four nations, however for most Places and for most indicators, levels of pride in place and place attachment are lower than national averages. Over time, these datasets will be revisited and updated, to track impact on pride in place at the population level across the Places.

Key findings from year one on the effect of Initiative design on delivery approaches

Flexibility in the Initiative's design is appreciated by area teams and lead organisations, but not interpreted and enacted consistently. This flexibility has enabled area teams and the lead organisations to explore local ambitions and solutions that they regard as right for their Places. This has unfolded in an approach, however, that looks broadly similar across Tranche One Places – a focus on the 'development phase' and scoping activity to produce a vision for each Place.

In some Places, area teams and lead organisations indicate that more substantive proposals for local heritage are not likely to emerge until development phase work is complete i.e. a staged approach. The Heritage Fund is recommended to reflect on the extent to which this more mechanistic, staged approach is intentional. Internal Heritage Fund policy consultees indicated this may, instead, reflect a lack of central policy resource for the Initiative, to guide implementation locally and encourage more fluidity in the approach.

The 10-year time frame is helping to overcome the limitations of shorter-term funding, but there is a lack of clarity regarding what this means in practice. The 10-year investment has allowed Places to take a more 'warts and all' approach in year one, that balances local capacity, resilience, risks and

realism, with ambition. This contrasts with their experiences of shorter funding programmes, which they see as limiting ambition, partnerships, and opportunities to delivery meaningful, transformational change.

There is a lack of clarity internally at the Heritage Fund, however, regarding the 10-year timeframe and whether Places may achieve their goals earlier or later than 2033. Policy consultees stated that it 'takes as long as it takes', but area teams are interpreting the timeframe strictly, encouraging Places to make use of the full 10-years and manage expectations post-2033. The Heritage Fund is recommended to reach agreement on this issue and communicate this accordingly; internally and to the Places. In addition, it will be important moving forwards that the language used by the Heritage Fund is consistent in setting expectations for the Tranche Two Places, who will have less time to deliver their ambitions i.e. that they will be able to access Initiative investment 'up to 2033'.

Project delivery in the Places is not yet delivering tangible impacts towards the Saving Heritage Investment Principle. The Place Index was weighted to prioritise local authority areas where the level of risk to heritage is significant. However, policy area consultees report concerns that year one activity focuses heavily on gaps in infrastructure and capacity. The Heritage Fund is recommended to reflect on the extent to which Saving Heritage ought to feature more substantively in development phase activity. If this is the case, Places will need support to balance identified needs in infrastructure and developing heritage's strategic position locally, with expectations to deliver early impacts for heritage.

Lead organisations' and area teams' experience of the year one process

Year one processes and support from the Heritage Fund have encouraged local ownership of the Initiative, but there is appetite in the Places for more boundaries, guidance, and peer-to-peer knowledge exchange. At the outset of Tranche One, the overall ambition of the Initiative remained broad – a long-term commitment to investing in places – with the four, specific aims defined later. While this created some initial challenges for area teams in communicating the Initiative, lead organisations and area teams describe the process positively, in the spirit of the Initiative, as an 'open invitation to engage'.

As lead organisations moved further into developing their first applications, some felt more boundaries and guidance from the Heritage Fund would have been beneficial, to help sharpen the focus of their development phase grant proposals and get to grips sooner with what Heritage Places 'means' to the Heritage Fund. This was felt most keenly by lead organisation consultees where the whole local authority area remains in scope, and the heritage need is high relative to other Places.

Lead organisations also reflect that it would be useful to exchange ideas with each other much earlier in the process, to support with project planning and initiation, and for the Heritage Fund to source feedback on challenges and solutions from the Places, and share advice and insights on grant process, the national evaluation, and any other central support mechanisms. For Tranche Two, the Heritage Fund should consider introducing peer-to-peer learning earlier to address these interests and concerns.

Support and guidance from the Heritage Fund has been highly praised by the Places but this has not been delivered consistently across all nine Places. Area teams have demonstrated empathy and tenacity in their support to lead organisations, and have worked to find solutions to local challenges. For example, Provision of RoSS consultants, funding exclusively for staff posts, the extension of single stage grants, flexibility with process requirements to expedite permission to start, and the separation of staffing from project funding to extend the staffing budget over two years.

Guidance on the scope of Heritage Places has also varied from Place to Place. Some area teams recommended that the lead organisations focus on a smaller geographic scale from the outset. The Heritage Fund is recommended to facilitate learning across the organisation from this early stage in the process and to consider whether the range of advice given to Tranche Two Places would benefit from a more standardised 'menu' of guidance, support and solutions.

The grant application process in year one has not been straightforward for many of the lead organisations, although there are some factors which appear to streamline this process. Developing first applications have generally been smoother in former Areas of Focus, in Places where there is greater familiarity between local partners and the Heritage Fund, and where there has been a narrower geographic focus. Challenges encountered in the preparation of development phase grants relates back to wider capacity constraints in many lead organisations, and in relation to expectations for

community and stakeholder input into the process. A lack of familiarity with Heritage Fund grantmaking was also a challenge in some of the Places.

The combination of long decision-making timeframes at the Heritage Fund and short delivery timeframes for the development phase is regarded by some Places as detrimental to a longer-term strategic approach, and as limiting responsiveness to emerging learning. It also places a high demand on lead organisation capacity to prepare multiple bids to maintain momentum and sustain key posts. However, this was not reported by lead organisations with a longer term for the development phase grant. This also underscores our recommendation that the Heritage Fund reflect on the variation in timescales for the development phase in Tranche One.

Maintaining a lower public profile for the Initiative is proving helpful in the early stages of delivery. 'Micro communications' focused on local partners and stakeholders have been reported as helpful in building collaborations while managing broader expectations, and allowing space for early phase strategic work to follow its natural course. It is recommended that the Heritage Fund communications focus, at this time, on key audiences for Places' strategic work, rather than the wider public.

Recommendations

Here, we set out six key recommendations to the Heritage Fund, based on insights and learning from year one. The full suite of recommendations is set out in the final chapter of the full year one evaluation report.

- Maintain the Initiative's **10-year commitment** to place-based transformation, and carry forward learning, from the full course of the Initiative, about the benefits of a longer time frame, into future place Initiatives. The 10-year timeframe is opening up new possibilities in the Places, to tackle the 'root causes' of the challenges facing local heritage, and gather evidence on long-term impact. This should be commended and continued.

- Continue to invest in an **inclusive, equitable and collaborative development phase** that involves wide-ranging partners, stakeholders and communities in the Places. This reflects recommended practice in place-based working, and evidence from previous place-based programmes highlights the added value of this foundational work, in terms of long-term impact and sustainability.

- **Take stock of progress and emerging delivery approaches** in the Tranche One Places. The objectives of such an exercise would be to revisit the drivers for the delivery approach and whether these are sufficiently demarcated to encourage local approaches that fit with the Heritage Fund's expectations and ambitions for the Initiative in its early stages. This would encompass **further scoping of the drivers for delivery,** including:

  - The **geographical scale** for local implementation – and under what circumstances Places might be encouraged to focus on a lower geographic scale from the outset.
  - The **timeframe for delivery**, both in terms of how the 10-year timeframe is to be understood, communicated, and any legacy investment beyond 2033, and the expected timescales and success criteria for different stages of the Initiative, particularly in the initial exploratory stages.
  - Any requirements that need to be satisfied, and recommended approaches, to establish a **holistic and comprehensive approach** to local heritage. This should provide a clearer definition of the term holistic and whether this indicates to Places that the full breadth of heritage should be included, as well as the circumstances under which Places would be encouraged to focus down on a particular theme or forms of heritage from the outset.
  - The quality and standard of evidence to demonstrate that priorities and plans are **responsive to local needs**, and the circumstances in which Places can 'fast track' capital projects while exploratory work to understand local needs is an ongoing priority.

- Give further consideration In the **Tranche Two selection process** to local heritage infrastructure, in terms of the strength of mechanisms that convene heritage partners at all levels, and capacity for collaborative delivery of more ambitious schemes. The strength of this infrastructure and capacity emerges as a key feature of local context that influences delivery and progress in year one.

- Review the **grantmaking process for the development phase,** and the range of tools and workarounds that have been found to overcome challenges, in order to ascertain whether the open

programme funding mechanism can be improved to better respond to the opportunities of place working during this phase. In particular, this would explore scope within the open programme processes and procedures to offer longer-term revenue funding to lead organisations.

- Consider **reprofiling the Initiative's funding allocations** across the 10-years, to respond to evidence from Tranche One that demand for funding is lower than anticipated during the development phase of delivery. Only 15% of the two-year funding allocation has been awarded to date. Testimony from the Tranche One lead organisations highlights limited capacity within their organisations, and among local partners, to deliver more while their development phase projects are still underway. Any adjustments to implementation in 2025/26 are therefore unlikely, on their own, to generate an uplift in grantmaking that would warrant maintaining the original allocations for the 2023-2026 period. The Heritage Fund is recommended to apply the learning and insights from the first two years of Tranche One, to revise the Initiative's funding allocations over the remaining eight years of the initiative.

1.1 Introduction

1.1.1 The Heritage Places Strategic Initiative

The Heritage Places Strategic Initiative (the 'Initiative') is a £200m, 10-year (2023-2033) investment in up to 20 'Heritage Places' across the UK. The Initiative is one of a suite of targeted National Lottery Heritage Fund (the Heritage Fund) interventions, which seek to fulfil the 'place' focus enshrined in its strategy, Heritage 2033. Specifically, the Initiative aims to improve the condition of heritage, increase the pride people take in their local area, and deliver long-term, place-based transformation.

It intends to place heritage at the centre of local approaches to boost pride in place, and deliver the changes people want to see in their local areas. An explicit focus on place and heritage is expected to galvanise relationships in the funded areas, to an extent which would otherwise not occur organically. Moreover, it is hoped this commitment to heritage-led transformation will signal the Heritage Fund's place ambitions to external audiences and public stakeholders across the UK.

The Initiative aims, as put forward in the Heritage Fund's Business Case, are as follows:

- Targeted place-based investment that increases pride in place and connects communities and visitors with heritage.
- Increase the capacity of local heritage to maximise its contribution to places and communities and enhance the wide-ranging benefits it can bring.
- Create integrated and holistic schemes across the breadth of heritage, including, for example, anchor institutions, cultural heritage, and the natural environment.
- Take a people-centred approach enabling everyone's heritage to be recognised.

In pursuit of the above aims, the Heritage Fund is not prescriptive regarding the specific outcomes or activities in each Heritage Place. The Initiative will instead lend flexibility, allowing opportunities for dialogue with local organisations and leaders, local assessment and definition of need, and locally identified schemes and solutions. It is hoped this flexible, open approach will ensure sustainability of interventions and outcomes.

1.1.2 Background to the evaluation

In March 2024, the Heritage Fund commissioned ERS Ltd. (ERS) to undertake an independent evaluation of the Heritage Places Strategic Initiative, and to share insights and learning with key evaluation stakeholders. The evaluation aims to establish a framework for measuring the long-term impact of the Initiative up to the end of the current strategy period in 2033. This encompasses a period from March 2024 to January 2027 during which ERS is commissioned to create, deliver and embed the evaluation framework, in order to support the Heritage Fund to continue impact measurement beyond the contract period.

The Heritage Fund identified a series of evaluation questions to guide the framework and research:

- What has been the impact of the Initiative in relation to its original aims (separated into four sub-questions covering each of the strategic aims of the Initiative)?
- What are the benefits and challenges of working to a 10-year commitment both for the Heritage Fund, and for the Heritage Places? Where does this method complement or duplicate existing place work funded through our open programme as well as other strategic initiatives highlighted in the Heritage 2033 strategy?
- Is the way Heritage Places have forged partnerships and implemented their projects true to the assumptions made at the start of the initiative?
- What are the circumstances needed to allow the strategic initiative to work?
- What wider conditions support the aims to boost pride in place and support people's connection to where they live, work and visit?
- What are the benefits and challenges of using a strategic initiative? Where does this method complement, or duplicate existing place work funded through our open programme as well as other strategic initiatives highlighted in the Heritage 2033 strategy?

- Have the projects allowed the Heritage Fund to engage with new community organisations which it may not otherwise have reached? Has the strategic initiative allowed the Heritage Places to engage and collaborate with diverse local sectors in addition to heritage and cultural institutions?

In addition, the Heritage Fund set out a proposed approach to the evaluation, organised across four key strands:

Strand 1: Evaluation Strategy, Framework, Project Plan and Timetable, to define the strategy and framework for evaluating the Initiative. Specifically, the scope and methods, timings, benchmarking, how complexity and attribution will be considered.

Strand 2: Initiative-Level Theory of Change, to produce an Initiative-level theory of change, which aids in identifying the quantitative and qualitative data needed to evidence impact at the Initiative-level, and develop tools to support data collection.

Strand 3: Benchmarking, Data Collection and Analysis, to collate, interpret, and synthesise secondary data and gather primary evidence on the impact and performance of the Initiative.

Strand 4: Peer-to-Peer Network, to facilitate learning between the Heritage Places as well as gather and record evidence to disseminate learning and the Initiative's impact.

1.1.3 The aims of this report

This report is the first of three reports which will be produced – one each year - during the contract period. In this first interim report, we set out the evaluation design and framework (at Annex A: Evaluation Design), alongside the context for the Initiative nationally and locally, as well as findings from the first year of implementation. Later reports will explore emerging impacts across the Heritage Places ('the Places') and at the Initiative-level, once the Places are further into delivery, and the evaluation framework and research tools are embedded within the Heritage Fund and in the local areas.

The report proceeds as follows:

- **Chapter 1.2: Strategic Context**, outlining the national strategic context for the Initiative, and the need and rationale for a place-based intervention.

- **Chapter 1.3: Design of the Initiative**, describing the key design features and drivers of the delivery approach, alignment with the Investment Principles, and funding allocations for the Initiative over the first three years of delivery, alongside reflections on the Initiative's design from local and national stakeholders.

- **Chapter 1.4: Delivery and Progress in Year One,** the first of four chapters presenting evaluation findings from year one, highlighting key areas of progress and challenge in year one as well as how success is understood at the local level.

- **Chapter 1.5: Key Contextual Factors in Year One,** identifying the key contextual factors that have influenced delivery to date, and in what ways, as well as exploring the potential of quantitative measures of local context to benchmark the starting positions of the Places.

- **Chapter 1.6: Key Design Features in Year One,** identifying how features of the Initiative's design have influenced delivery to date in the Heritage Places.

- **Chapter 1.7: Experience of the Year One Process,** highlighting the experience of area teams and lead organisations in year one, with regards to the initial designation as a Heritage Place and subsequent steps and processes to move Places forwards on their journey.

- **Chapter 1.8: Conclusions and Recommendations**, responding to the key themes and findings from implementation in year one in order to draw conclusions and make recommendations for Tranche One and Tranche Two initiation and delivery.

1.1.4 Methodology

The methodology for the whole evaluation is set out in full Annex A: Evaluation Design. In summary, this encompasses:

Primary qualitative research:

- Semi-structured interviews with representatives of the lead organisations (12 local authority officers and one CIC lead officer, responsible for delivery of the Initiative) at two intervals: September 2024, to inform the evaluation design, and January 2025, to gather primary evidence from implementation of Tranche One.
- Semi-structured interviews with senior staff from the Heritage Fund in January 2025 (3 members of staff, including a Head of Engagement, a Head of Investment and a Policy Head), to collect primary evidence from implementation of Tranche One.
- Semi-structured interviews with representatives of strategic stakeholders in January 2025 at national and regional level (3 strategic stakeholders), to gather primary evidence on strategic context and rationale for the Initiative, evaluation design and implementation.
- One workshop with senior leaders at the Heritage Fund in June 2024 to confirm evaluation priorities and discuss expected impacts, measures and timeframes for data collection.
- Nine theory of change workshops in each of the Heritage Places between October and December 2024, to guide production of the Initiative-level theory of change and evaluation framework set out in Annex A.

Secondary evidence, review and analysis:

- Documentation and data provided by the Heritage Fund, including but not limited to: the Initiative Business Case and studies which informed the delivery approach; internal resources which guide the delivery approach; the Place Index methodology; the Heritage Fund's Place Frameworks, and successful funding applications from the Places.
- Wider literature on place-based approaches, heritage placemaking and pride in place.
- Review of project monitoring returns up to January 2025 (3 monitoring returns received from the projects to date).
- A learning paper from Tranche One implementation, produced by the Heritage Fund's Heads of Engagement in September 2024.
- Information management system (IMS) data pertaining to Heritage Fund grantmaking.
- The Heritage Fund's budget tracker for the Initiative.

In each of the report chapters, we indicate which of these data sources have informed their preparation.

1.2 Strategic Context

1.2.1 National policy context and strategic rationale at the Heritage Fund

1.2.1.1 Strategic and policy context

The Initiative sits within, and grew out of, an evolving strategic context; one which recognises that place-based regeneration, inclusive economic growth, boosting pride in place, and heritage and cultural engagement are increasingly important components of public policy. This occurs amidst a backdrop of funding programmes which aim not only to achieve physical regeneration and economic benefits, but also which increasingly recognise the role arts, culture and heritage can play as a vehicle for place-based transformation with wide-ranging benefits.

Such programmes include, for example:

- Historic England's High Streets Heritage Action Zones (2020-24), supported by the Heritage Fund, which incorporated a cultural programme;
- The Great Place scheme (2016-21), a partnership between the Heritage Fund and Arts Council England (ACE), which sought to pilot ways to harness local investment in arts and culture towards delivering place-based outcomes for the economy, education, and health;
- Heritage Fund programmes i.e. Townscape Heritage Initiative, Landscape Partnerships, Future Parks Accelerator (with The National Trust), and Areas of Focus, which have each bestowed learning to the Heritage Fund with regard to place-based approaches; and,
- The Heritage Development Trusts programme, a partnership between the Architectural Heritage Fund and The Heritage Fund, with a similar place-based focus to the Initiative, providing resources to charities and social enterprises to make a positive and lasting impact on built heritage.

In combination, these programmes have yielded evidence that combining targeted place-based investment alongside cultural and heritage programming can lead to increased social and economic outcomes, in places of both need and opportunity.

In addition, the Initiative took account of the broader heritage and cultural landscape, for example: DCMS' Cultural and Heritage Capital work, as well as its review of the Heritage Fund as part of the Public Bodies Review Programme; the Department for Environment, Food and Rural Affairs' (DEFRA) Natural Capital Approach; and, initiatives such as Core Cities UK and Cities of Culture. Together, these demonstrated an evolution in heritage and place policy, as well as practice. The Heritage Fund is poised to respond (and continue to contribute) to this evolving landscape as it begins its new strategic period.

Further, in developing the Initiative, the Heritage Fund responded to calls from central and the devolved governments. For example, the Secretary of State, DCMS, and devolved administrations, have emphasised variously in communication with the Heritage Fund that: Arm's-length bodies (ALBs) should increase their focus on place and improve collaboration with local authorities; contributions to place and the levelling-up agendas should be prioritised; and, there should be an increased focus on distribution of funding to under-served areas, with the Heritage Fund asked to place increasing emphasis on these factors as part of their decision-making processes.

Although, as of 2024, the "levelling-up" terminology has been retired by the Labour Government, reverting the department back to the Ministry of Housing, Communities and Local Government (MHCLG), there is continued ambition to address regional inequality, and to support communities and places across the UK.

1.2.1.2 Need, rationale and Heritage Place selection

Taking account of the broader internal and external context above, as well as learning and evidence established via prior programmes and wider research, the Initiative delivery approach is rooted in the following drivers, as identified by the Heritage Fund:

- Proactively targeted geographical investment;
- Long term commitments;
- Taking a holistic and comprehensive approach to all heritage; and,
- A responsive approach to local needs.

The Heritage Fund's Place Index was used as the basis for selection of the initial tranche of nine Heritage Places. The Index sought to identify local authority areas where there was a balance of need, opportunity and potential. In support of this, the Heritage Fund commissioned an external, independent review of the availability and coverage of indicators linked to these three principles across all four UK nations. Following this review, four factors that indicate need and opportunity in local areas were identified as suitable for national level analysis. This data was used to rank geographical areas, according to these principles and factors. The four factors and their indicators are:

- Heritage at risk or in poor condition – measured by a modified RSA Heritage Index.
- Social and economic deprivation – measured by Indices of Multiple Deprivation.
- Low levels of prior funding in heritage – measured by the time series of Heritage Fund investment.
- Non-heritage specific infrastructure, cultural, creative public funding – measured by the presence of other place-based investment.

Prior to the analysis, a process of data normalisation was carried out by indexing indicators on a 0-100 scale, to account for different units of measurement. Some indicators within the Place Index were indexed against a percentile in order to reduce the impact of outliers. Indexed scores were then weighted, based on the importance attributed to each factor with heritage condition weighted at 75%. This then provided the final scores for each Place. It is important to note that due to the differences in data available across the four nations, Places are ranked within their own national context. As such, direct comparison across the whole cohort is not possible.

Heritage Fund staff, Committees, and Board, as well as external stakeholders provided further scrutiny of the indexed scores, as well as qualitative insights from the field to account for limitations in the scope of the index in relation to potential and opportunity factors specifically. Committees further considered:

- **Evidence of local leadership:** whether, for example, the local authority actively included heritage within local plans relating to the area, and/or whether it had cultural, heritage or green space strategies that aligned with the Heritage Fund's own ambitions (opportunity).
- **Strength of local infrastructure**: the strength of local infrastructure and partnerships to support successful heritage investments in the next three years (potential).
- **Extent of heritage and heritage adjacent ecosystems:** alignment with cultural and tourism activities or investment that created the opportunities for the Heritage Fund's investment to have greater impact and reach over time, and particularly within the next three years (opportunity).

In May 2023, the first tranche of nine Heritage Places (Tranche One) was announced, namely:

- Neath Port Talbot (Wales);
- Stoke-on-Trent (Midlands & East);
- Leicester (Midlands & East);
- County Durham (North);
- North-East Lincolnshire (North);
- Torbay (London & South);
- Medway (London & South);
- Glasgow (Scotland); and,
- Armagh City, Banbridge and Craigavon Council Area (Northern Ireland).

The second tranche of Heritage Places (Tranche Two) will be confirmed in June 2025.

1.2.2 Strategic stakeholder reflections on the rationale for the Initiative

The three strategic stakeholders consulted for the report saw a clear rationale for the Initiative. Specifically, there was agreement that the benefits of targeted investment in a place hold potential to be greater, in accumulation, than equivalent funding directed towards heritage assets in isolation. This clustering of improvements within a place, one stakeholder related, is likely to improve footfall and 'place perceptions' to a greater extent than developing a single asset. The stakeholder further suggested that capital restoration of historic spaces, when combined with cultural programming in said spaces, such as was seen in Historic England's High Streets Heritage Action Zones (2020-2024), can generate success in bringing people to places.

“I think there is a growing understanding that interventions in heritage can achieve more when made at the level of place, as opposed to made at the level of individual assets. But when you do engage in a place, you are able to kind of shift the dial - if you will - for that place, in a way you can't do by just working with an asset.” – Strategic stakeholder consultee

Moreover, at a strategic level, there was consensus that the chosen approach for the Initiative was grounded in a recognisable rationale; one which feeds into wider policies and agendas nationally, as well as particular to the Places supported.

“Whilst the temptation is (often) to centralise things, communities thrive on their own unique identity and, in particular, their heritage gives them that identity.” – Strategic stakeholder consultee

Also, it was noted that Heritage Places aligns strategically with the Architectural Heritage Fund’s Heritage Development Trusts programme, a successor programme to a pilot, which emerged via a solicited bid from the Heritage Fund. As a result of close working, there is some co-location of the designated Heritage Development Trusts and Heritage Places.

1.2.3 Summary: Strategic Context

- The Initiative sits within, and grew out of, an evolving strategic context; one which recognises that place-based regeneration is an increasingly important component of public policy.
- The approach to combining place-based investment with heritage and cultural programming is well-evidenced, and illustrative of an evolution in place policy and practice over recent years.
- The broader strategic landscape is in alignment with the Heritage Fund’s own strategic ambitions.
- Heritage Places were selected via the Heritage Fund’s Place Index. This Index sought to identify local authority areas where there was a balance of need, opportunity and potential. This was achieved via a combination of quantitative indicators and deliberative discussion.
- In October 2023, the first tranche of nine Heritage Places was announced. The second tranche of Heritage Places will be confirmed in June 2025.
- Amongst stakeholder consultees, there was consensus that the rationale was robust, and that the chosen approach for the Initiative fed into wider agendas nationally and at a Place-level.

1.3 Design of the Initiative

1.3.1 Background, key principles and features

The Initiative is grounded in research commissioned by the Heritage Fund to inform its strategic approach to working in place. It highlights the complexity involved in both defining the term 'place-based' as well as operationalising new place-based funding programmes amid the variety of models employed in place-based working.

Notwithstanding this complexity, some hallmarks of effective place-shaping emerged from the Heritage Fund's research: understanding the system of a place and how it is working; agreeing a vision and measures for success; forming a delivery plan, delivery group, projects and programmes; and celebrating success. The research also considered the selection criteria for identifying areas for place-based investment, recommending that broader considerations of 'potential' ought to be included alongside evidence of 'need' and the likely prospects in any given place of achieving system change, additionality and sustainability.

The research reviewed previous place-based funding programmes at the Heritage Fund, revealing some prior success factors for working in place. These corroborate the findings from wider research into place-working, that change at the level of the place system is crucial to achieve additionality and sustainability from place working.

In previous programmes, this has manifested through stronger partnership working and collaboration, improved data and intelligence sharing to understand the local context for place-working, and greater alignment with wider policy and strategic frameworks. Key challenges and barriers related to the strength of local leadership, gaps in skills and knowledge, and the paucity of locality-specific evidence on the contribution of heritage to place-shaping priorities.

The Initiative has been designed in response to this evidence base on effective place working, and the four key drivers outlined in Section 1.2.1.2, repeated here:

- Providing targeted geographical investment in a small number of places.
- Making a long-term investment for the duration of the Heritage 2033 strategy.
- Taking a holistic and comprehensive approach to all heritage.
- Enabling a responsive approach to local needs.

Over the period of the first Heritage 2033 delivery plan from 2023 to 2026, the Initiative will be implemented in stages, with specific budget allocations and expected timeframes:

- Developing scheme plans – a £3m allocation in 2023/24 for planning and capacity building to develop scheme plans collaboratively with local partners and stakeholders.
- First year of delivery – £20m in 2024/25 deployed through a range of funding mechanisms including project planning grants, development grants, fast track delivery grants and others. Each place will be encouraged to bid for £250k through the delegated decision route, to focus on project planning, capacity and early engagement work, although in some areas larger grants are expected where Places are building on existing activity.
- Second year of delivery - £30m in 2025/26 for delivery of projects and schemes.

All Heritage Places grantmaking will be undertaken through the National Lottery Grants for Heritage (the open programme). The open programme is a flexible funding mechanism, providing grants from £10k up to £10m. Applicants must also demonstrate how their project fits within the Heritage Fund's Investment Principles, alongside the broader aims of the Initiative. Applicants will continue to have access to open programme funding that is not awarded through Heritage Places. However, it is expected that these grants will only be awarded to local Heritage Places partners in 'exceptional cases', e.g., if an award would result in the Initiative budget being overstretched for that budget year.

The relationship envisaged between the Initiative and the Investment Principles is set out in the Business Case as follows:

Saving heritage – The Initiative's long-term commitment and joint vision will give multiple managers of heritage assets the time needed to build partnerships, learn from each other and tackle longstanding heritage condition problems together. By using the Place Index, which is weighted 75% to heritage in need and uses at risk data to determine the Places, the Initiative will provide additional investment to make a significant contribution towards this Investment Principle.

Protecting the environment – The Initiative will increase local government and stakeholders understanding of the importance of natural heritage recovery within place transformation. Access to natural heritage policy expertise will allow best practice in carbon footprint reduction and conservation to be followed.

Inclusion, access, and participation - The long-term commitment to places will give the Heritage Fund an opportunity to understand the barriers to heritage access facing under-served communities and encourage strategic solutions. The Initiative's commitment to place-based working principles will mean that inclusion, access, and participation in local heritage and with the local community will be integral to all place-based solutions. Strategic aims relating to pride in place will mean that the recognition of everyone's heritage will also be key.

Organisation and financial sustainability – There will be opportunities to target Places to consider long term needs of the local sector in terms of skills and capacity, and to target investment accordingly. Governance reviews and mentoring will be available to organisations in need of support.

In order to facilitate a place-based approach, each Place has been invited to designate a lead organisation or lead partnership that can act as a primary contact, apply for funding, and endorse applications from wider partners in each Place. It was envisaged in the Business Case that some partners would be local authorities' culture and heritage teams but that final decisions would be led by the requirement to find 'the right partners to meet the needs of the place'.

After Business Case approval, responsibility and accountability for delivery of the Initiative has moved to Business Delivery (area teams), supported by Business Insight and Innovation staff and including a six-month, temporary Place Policy Manager acting as coordinator and policy expert to aid transition from the agreed approach into delivery. Area/Country Directors and Senior Management teams therefore lead the delivery of the Initiative, 'to ensure a flexible and strategic place-based way of working and that project types and outcomes are led by places themselves'.

Resources which support engagement and investment teams in taking a place-based approach have been added to the Heritage Fund's Knowledge Hub. Among these are:

- A Heritage Places Strategic Initiative Proforma, which guides initial discussions in the selected Places with prospective lead organisations and stakeholders.
- Guidance on taking a place-based approach to investment.
- A summary of the decision-making process for Heritage Places funding applications.
- Place Frameworks for each area and country which signpost teams to statistical data sources and provide an overview of local/regional government and policy context, economic partnerships etc.
- My Places dashboards which provide insights on grantmaking and key statistics about local authority areas.
- An Initiative dashboard which provides summary information about grantmaking.

Questions for area teams to consider at assessment illustrate how the overall approach might be expected to take shape and result in place-based investment that differs from 'siloed' projects funded through the open programme:

- Does the project draw links to the needs or priorities of a place? Is the need well-evidenced?
- Does the project demonstrate a connection to wider place priorities?
- Does the project identify whether the project connects with other heritage attractions/projects in an area?

1.3.2 Alignment of the design with wider evidence and research

The Initiative design also speaks to wider evidence and research on place-based approaches and heritage placemaking. Creative and humanitarian approaches to working in place are explored in the Arts and Humanities Research Council (AHRC) Place-Based Research Programme. A central finding is that impactful arts and humanities place-based work derives from **working creatively and collaborating with a range of partners**. In its review of place-based approaches (PBAs) and evaluation methodologies, the Centre for Evidence and Implementation employs a definition of PBAs which aligns with the Initiative's **targeted, long-term, holistic and responsive investment** and provides further encouragement to work collaboratively with local partners and stakeholders:

'Collaborative, long-term approaches that are based in a geographically bound location, focus on local needs, local solutions, and the unique attributes of a place, involve more than one statutory agency … and demonstrate meaningful engagement and involvement of local communities … in the design and/or delivery of the approach.'

The review, in line with the Heritage Fund's own research, draws attention to the **complexity of place-based approaches**, attributing this to several factors: their focus on deep-rooted problems in localities that are themselves inherently complex, the involvement of multiple organisations and individuals, their long-term, adaptable nature, and the fact that they defy the application of a fixed design, emerging instead through interactions in a place. The Initiative's **flexible, place-led approach** and **focus on 'root' problems** - the long-term needs of the sector, longstanding challenges for the condition of heritage assets, and the barriers to access among under-served groups – embrace this complexity.

The Initiative's **holistic approach** meanwhile reflects the vast body of literature concerning the contribution of heritage to placemaking. In 2021 DCMS launched the Culture and Heritage Capital Programme to review the evidence and start building an economic valuation approach for calculating the full value of cultural and heritage assets to people and places. The Culture and Heritage Capital Framework (CHC) provides the starting point for the development of assets, services and benefit flows definitions, which will evolve over time. The framework identifies the **condition of heritage assets** as a key variable which impacts the flow of services from these assets, reinforcing the close relationship envisaged between the Initiative and the Heritage Fund's **Saving Heritage Investment Principle**. These assets and services produce a multitude of outcomes for places and place-based relationships, including place character, attractiveness, brand and distinctiveness, community identity, sense of belonging, and pride in place. The more holistic and dynamic approach to heritage opened up by the Initiative is therefore promising for unlocking this wider array of benefits and exploring how and under what conditions they arise.

The rationale for **local, place-led delivery** of the Initiative is also supported by evidence on the factors which shape people's sense of place, summarised in Townscapes: Pride in Place. The quality of the built environment features prominently in much of this research as a determinant of levels of pride, as well as the role of community spaces which provide amenities and where heritage can be celebrated. Conversely, abandoned and neglected sites act as powerful symbols of lost, former glories, which undermine positive sentiments towards places and their future prospects. **Involving local communities** in identifying the heritage that matters to them is therefore a crucial step to unlocking pride in place.

Many of these studies also highlight the two-way interaction between physical environments and how they are actually lived in and shaped by communities, in unique ways, and in different places. This **'emotional geography' of a place** calls for the involvement of people as 'agents who can tell their own stories about a place, make sense of its histories and meanings, and devise aspirations for its future.' Similarly, the Feeling Towns project, one of nine Knowledge Exchange Projects of the AHRC's Place-Based Research Programme, advocates for a people-centred, place-led approach that, 'holds the lived, felt, geographic, and economic dimensions of place together … to ensure that the intimate, everyday, and embedded relationships that people have with their places are centred within place-based policies and practices'. The Initiative's **locally-led response to low and declining pride in place** chimes with this evidence base, since sources of pride in place are distinctive to individual people and places, and local policymakers must tailor interventions accordingly.

The interaction between physical and emotional geographies is a prominent theme in Heritage and Civic Pride, commissioned by Historic England to explore the role of historic buildings, industrial heritage, and

historic parks in fostering civic pride. It finds that town centres and landmark historic buildings make people's sense of civic identity tangible, and that this effect is especially strong when these buildings have a connection to everyday life, such as department stores, stadiums, or pubs. However, while the assets themselves and their role in the rejuvenation of local places was important to people's sense of pride, the intangible heritage associated with them was also crucially important i.e. the stories, family history, and folklore surrounding them. The Initiative's wide scope, encompassing the **breadth of tangible and intangible heritage,** provides opportunities to activate these connections.

Figure 1.1 Leicester Cathedral (Leicester Heritage Place)

1.3.3 Reflections on the design of the Initiative

1.3.3.1 Selection process

Area team representatives consulted for the report agreed that the Place Index provides a transparent methodology for shortlisting local areas, which is needed to justify a targeted approach. When coupled with the local insight from area teams, they generally viewed the Tranche One selection process as positive. According to consultees, it has resulted in pragmatic, evidence-based decisions in their respective areas, which reflect: the scale of need in the Places; the distinctiveness of the local heritage; the opportunity for impact; as well as the appetite of lead organisations to engage in heritage-led placemaking.

However, consultees felt the process could be improved with more time and encouragement for area teams to explore appetite and capacity to engage in the local areas, within the prospective lead organisation but also among local stakeholders, as well as the strength of vision in the shortlisted Places. They welcomed the longer decision-making timeframe for Tranche Two and the opportunity to engage in more in-depth discussions with shortlisted Places before arriving at their recommendations.

This reflects concerns shared by policy consultees that the Tranche One process appears to have drawn short of identifying Places where the infrastructure is strong for a place-based approach; with the current focus on capacity building in many of the Places suggestive that infrastructure was not sufficiently developed at the outset in these areas. However, area team consultees reflected that delivery progress in the areas may also be the outworking of a selection process which they suggest favours larger, urban areas where it may be more difficult to achieve early impact.

Comparing this to placemaking investment by the Heritage Fund at a smaller, settlement level, which has emerged organically through the open programme, some area team consultees felt there may be learning from these 'organic' place-based case studies for this, and future, place-based initiatives. In the examples shared, these consultees highlight the role of grassroots organisations in galvanising heritage

placemaking in the town, their understanding of their Place and links to communities, and the availability of active and skilled volunteers in these organisations to advocate for, and lead, change efforts collaboratively. They suggest this may offer a different perspective on place working, and the characteristics of a Place that may be important influences on successful heritage placemaking.

"It might be worth us looking not just at the ones that were selected as Heritage Places, but a bit of a broader range of places where we know we've had an impact. How did it happen there? We've kind of engineered this work in place to do it in these [the Heritage Places], but it's happened naturally over here. How did that happen? So, it's that convening, I think, that either happens organically, or we're doing it [the Heritage Fund] in the Heritage Places." – Area team consultee

Strategic stakeholder consultees were also invited to share their reflections on the selection methodology and process. One strategic stakeholder felt that selection criteria should have been tied more strongly to the target outcomes sought. For example, they reflected on the Initiative's pride in place objective, stating that if this is a core goal, it would have made sense to focus on selecting places where low baseline levels of pride could be observed. It was considered this would allow greater impact as well as tracking of impact over time.

Placing greater emphasis in the selection weighting on the condition of the historic fabric of areas, this stakeholder shared, would suggest this Initiative primarily sought to improve the condition of heritage in and of itself, as opposed to delivering broader aims via heritage. This stakeholder shared that placing more emphasis on broader conditions of place, and need, such as levels of deprivation, might better align with the change being sought.

Criteria that were reflected to have been appropriate were those looking at historic areas of underinvestment, as well as to those areas which were considered to have existing "infrastructure" in place to be able to support successful delivery of the Initiative's aims. This was felt to minimise risk for the Fund in terms of its investment; however, on the flipside, one stakeholder wondered whether there was an argument for purposefully supporting those places that do not have the existing infrastructure, and which therefore may be places most in need. The consultee also reflected that the long-term nature of the Initiative may have presented an opportunity to take greater risks in selection.

Positively, some stakeholders mentioned having been involved in the discussions regarding the selection methodology and supporting the process. They praised the discursive, deliberative element of the process, indicating that the "human" element was necessary, and suggesting that a quantitative set of measurements alone would not have told "the whole story".

1.3.3.2 Targeted, flexible investment in places

Where strategic stakeholders felt sufficiently informed to comment, they praised the targeted investment through Heritage Places, highlighting that in open programmes, the same organisations may have success again and again with grant funding due to skilled bid writers, regardless of need. In this sense, these open programmes may fail in directing funding to where it can make the biggest difference. The "flexible" approach taken by the Heritage Fund, i.e. in terms of heritage focus, lead organisation, timescales, as well as project type and delivery mechanisms, was also seen as a positive, and one stakeholder cited that this same approach had garnered success in a previous place-based initiative delivered by their organisation.

Finally, the place-based approach was well-understood by the stakeholders consulted.

"I think that the place based work makes a lot of sense. I think it makes sense to work where you have local authorities and local government and regional systems and things set up in a way that everyone is moving in the same direction. Everyone strategically understands what the goal is for that area. I think you're going to make a lot more difference." – Strategic stakeholder consultee

1.3.3.3 10-year timeframe

There was strong consensus among strategic stakeholder consultees that the ten-year timeframe of the Initiative was its greatest strength. Respondents variously termed this "exciting", "brave" and "positive". Moreover, one individual felt the Heritage Fund was demonstrating "thought leadership" in delivering to a

ten-year period, and that making the case for longer-term investment in the sector is valuable given it is harder for smaller organisations to operate similarly.

"(It's) helping make the case for that longer-term investment, because it's really hard for smaller organisations like ours to (…) because our funding comes from government and Government has short term priorities; so, if you can take an organisation that has its own funding and they can demonstrate the value of that longer- term investment, I think that's really valuable. So I think that's it for me. That (the timeframe) is the single, most exciting aspect of what they're trying to do." – Strategic stakeholder consultee

One stakeholder approached consideration of the Initiative timeframe via the typical length of physical heritage regeneration projects. The stakeholder observed that, according to evidence from prior funding programmes, projects might typically take between five and ten years to move from start to completion, with only around a third of funded capital works completed by the five-year mark. The consultee relayed that the ten-year timeframe is therefore particularly interesting in terms of capital projects, as within that period, "you are actually seeing the building coming online". They expressed that it is valuable for heritage sector organisations to be able to both observe and to measure the impacts once capital-funded spaces are up and running, so that the full scope of benefit can be captured, as well as to support learning around potential "danger points" which may greet organisations as they transition to this new phase of operation.

"We know that the first few years of operation is a really dangerous time period, because maybe you've got the right skills for delivering a capital project, and you don't have the right skills for running an operational organisation. Where are the danger points and what can be done to mitigate for them and for me, and what is the result on the ground?" – Strategic stakeholder consultee

Another stakeholder related that the Initiative should be "congratulated" for its long-term approach. They signalled that working with places for a prolonged period of time is "the way to go". Moreover, they suggested that other organisations across the sector may wish to take that long-haul approach, but that they can often by constrained by short-term funding cycles; especially Government-led funding.

"I think being able to work with a place for that period of time has a huge amount of benefits. But of course, you need to pick the right places because you're in there for the long haul (…) The Fund should be congratulated for having the bravery to take that long term approach because that's how you do change places. I like to talk in terms of "sticky" outcomes, essentially outcomes that stay once you leave (…) and I think ten years gives you the opportunity to really embed that benefit and change in a place and in the communities that live in that place." – Strategic stakeholder consultee

Another stakeholder agreed that the longer investment timeframe was positive, pointing to the opportunity it offered to develop and train people, and to embed skills in a place to a greater extent than would be possible in a shorter-term intervention. Specifically, the stakeholder saw the potential to develop individuals' skills in heritage project management and funding management, bid writing, and practical skills in liaising with contractors. They cited that this may become a potential legacy of the Initiative, and may generate greater impact from allowing those skills to develop in place, as opposed to having shorter-term initiatives where personnel move around, not allowing the skills to be harnessed to their full potential.

In terms of the phasing of implementation over the 10 years, stakeholders agreed that activity centred on community engagement was important activity for the Places to undertake in the early phases of the Initiative. It was considered important that people and communities feel a "part" of the activity and have a true opportunity and sufficient influence to shape and direct it, rather than having something which is "done to them". Supporting this, a couple of stakeholders emphasised the success prior programmes have enjoyed when combining capital work with cultural programming, involving communities and bringing them into the historic spaces, and in turn, shaping the way they interact with and advocate for future plans around place.

"I like the way that they're going about it in a very people-centric way and it's not heritage for heritage's sake. It's not heritage 'on high' and elite. One of the questions they (a Heritage Place) asked in their survey was something about 'what does heritage even mean to you'? So they're really trying to widen it

out - not just to the usual suspects in the heritage world. They're genuinely asking people who probably don't realise that they interact with heritage every day, you know?" – Strategic stakeholder consultee

One stakeholder advised that although the timeframe of the Initiative is considerable, and that this provides greater room for consultation, development and planning, that there is a strong imperative for those Places intending to undertake capital projects to start early. They related that, given the equally long timeframe typically involved in bringing capital restoration and regeneration projects to completion (i.e. achieving operational spaces), it is imperative that the Places commence their capital activity soon in order to realise outcomes within the span of the Initiative – importantly, so that results can be observed and captured within the timeframe also. Further, sustainability was seen as key, in terms of Places' projects being capable of generating revenue funding in the longer-term.

"I do think sustainability needs to be very, very important. We're in a very difficult economic environment with high interest rates, low public funding available, and there's not really any indication that that's going to change in the next couple of years. And yes, the Heritage Fund can be there with capital funding, that's great. But who's looking after the long-term revenue?" – Strategic stakeholder consultee.

1.3.3.4 Lead organisations

Area team consultees felt that there were significant advantages to working with local authorities in the lead organisation role, in terms of the structures, resource flows and systems in place to manage public money at scale. The risk profile of smaller organisations when taking on larger grants is usually much higher, which can prohibit work at greater scale, although there are various mechanisms the Heritage Fund can deploy to help mitigate these risks.

Consultees balanced the advantages of local authorities taking on the lead role in the Places against the potential benefits of working with smaller, third sector organisations (or partnership organisations) such as Heritage Development Trusts. These organisations can prove more agile and creative in their delivery, and have strong grassroots connections to the wider heritage community and local communities. Co-leadership in the Heritage Places was also discussed as well as alternative governance mechanisms such as Cultural Compacts. This was viewed positively as a model which could result in greater impact and quality of delivery, assuming the co-leads have strong processes in place to resolve issues and conflicts, that roles and responsibilities are agreed, and there are clear lines of reporting and communication.

Stakeholder consultees were positive that there is flexibility in the approach to the choice of lead organisations. Stakeholders pointed specifically to Historic England's High Streets Heritage Action Zone programme, which operated the same criteria, reflecting that the two locations widely considered the most "successful" were the only two which were not local authority led.

Stakeholders recognised, therefore, that limiting the criteria to local authorities as lead organisations may therefore have unnecessarily constrained success, had this been implemented. That was not to say that local authorities are not expected to be successful. It is recognised they can bring many positives to such interventions. Rather, some limitations on local authority capacity and resource are observed, alongside the positive potential of community-led organisations to create change in place. That said, it was noted that local authority approval would likely be required in all cases, due to presiding over functions such as planning, of relevance to this form of place-based, heritage-centred Initiative.

Figure 1.2 Gladstone Pottery Museum (Stoke-on-Trent Heritage Place)

1.3.3.5 Grantmaking process

Overall, while the Initiative was regarded by lead organisations as highly flexible in its design, aims and approach, some consultees felt this was not mirrored in the grantmaking process. One lead organisation reported that the grant funding system has proven to be more rigid than anticipated in delivery, requiring detailed pre-planned activities for the year with limited flexibility to adjust priorities based on emerging insights from sector consultations and evidence gathering. A key takeaway for the local authority is the need to better structure and describe future funding bids to allow for greater flexibility and adaptability. This consultee felt that three- or four-years' worth of funding would be a better timeframe to agree a delivery plan against, while retaining this flexibility. They also expressed concerns that while the first grant has been successful so far in allowing them to explore the needs and priorities of the sector, a delivery response to these needs may take up to 18 months due to funding cycles and their processes.

A number of consultees felt there was not enough information about the application process and grant management mechanisms at the outset. Similarly, they also viewed the administrative demands of the applications process as disproportionate to the scale of funding, and the application requirements as not fitting comfortably with the nature of these early development projects, perhaps requiring their own bespoke process separate from the open programme.

"By the very nature of the first part of the strategic heritage places, it's about going, 'we don't know'. So actually, what we want is the money to find these things out. And these are where our gaps are." – Lead organisation consultee

1.3.3.6 Measurement and evaluation

All stakeholders agreed that the ten-year timeframe provides a unique opportunity to track and establish impact of the Initiative (generating learning for similar and potential future interventions), and that this was important to focus on. Typically, shorter programmes i.e., three-years or similar, will need to rely on projections of future impact, whereas the Initiative may have time to trace the full journey from inception to impact.

Stakeholders had varying perspectives in terms of where this measurement should focus, according to their individual perspectives and organisational interests. For example, one stakeholder highlighted the importance of calculating the tangible economic and monetisable benefits, as this was felt to be of

continued importance at the (UK) Government-level, and point to clear economic advantages. However, it is noted these types of measures would only be applicable to certain projects and Places in the Initiative portfolio i.e. those involving regeneration of built heritage. As well, given that this form of measurement would require specialist economic knowledge, it may not be appropriate or align with overall Heritage Fund evaluation ambitions.

Another stakeholder spoke about tracing the "golden thread" through the project in terms of pride in place. Another reflected that it can be difficult to "justify" heritage projects, and that the evidence base generated by the Initiative holds potential to showcase what can be achieved, particularly in terms of pride in place. Having said this, stakeholders were also keen to hear learning, and the "surprises" which emerge. It is anticipated that a lot of useful learning will be generated as approaches are trialled, reconsidered, and developed.

1.3.4 Summary: Design of the Initiative

1.3.4.1 Initiative design

- The Initiative design is grounded in research commissioned by the Heritage Fund to inform its strategic approach to working in place. This research highlighted: common challenges to working in place, hallmarks of effective place-shaping, and recommended selection criteria for place-based investment. The research further revealed that achieving system-level change is crucial to sustaining the effects of a place-based intervention.
- Wider evidence on place-based approaches (PBAs) and heritage placemaking supports the rationale for Initiative design. Broadly, it emphasises: a need for a collaborative, holistic, and locally-led approach; the complexity of PBAs; and, the contribution of heritage to place-shaping.
- The Initiative will be implemented in stages over the period of the first Heritage 2033 (2023 to 2026). Specific budget allocations and expected timeframes have been defined.
- All Initiative grantmaking will be undertaken via the National Lottery Grants for Heritage (the open programme). This is a flexible funding mechanism, providing grants from £10k up to £10m.
- The envisaged relationship between the Initiative and the Investment Principles is set out in the Initiative Business Case, demonstrating alignment.
- In order to facilitate a place-based approach, each Place will be invited to designate a lead organisation or lead partnership that can act as a primary contact, apply for funding, and endorse applications from wider partners in each Place.

1.3.4.2 Reflections on Initiative design

1.3.4.2.1 Selection Criteria

- Internal consultees reflected on the selection process for establishing the Places. Broadly, the selection process and criteria were felt to have been effective, adequately combining quantitative elements and "human" decision-making, and leading to pragmatic, evidence-based decisions.
- Where the selection process could be improved, this might include offering more time and encouragement for area teams to engage with decision-making, and to check circumstances (infrastructure, capacity) "on-the-ground".
- Consultees felt learning might be gleaned from localities where PBAs have emerged organically.
- One strategic stakeholder felt selection criteria should have been tied more strongly to the target outcomes sought, i.e., a focus on selecting places with low baseline levels of pride in place.

1.3.4.2.2 Ten-year timeframe

- There was strong consensus among strategic stakeholder consultees that the ten-year timeframe of the Initiative was its greatest strength; this was termed "exciting" and "brave".
- In terms of the phasing of activity, stakeholders agreed that community engagement is important activity for the Places to undertake in the early phases of the Initiative. However, capital projects were encouraged to begin "soon" to take full advantage of the timeframe and given the nature of typical regeneration timelines.

1.3.4.2.3 Lead Organisations

- Area team consultees felt that there were significant advantages to working with local authorities in the lead organisation role, in terms of the structures, resource flows and systems in place to manage public money at scale. Challenges cited included reduced local authority capacity.
- However, consultees were positive that a local authority lead is not mandated.
- Further, the potential benefits of community or third sector lead organisations were emphasised, which has proven successful in prior Initiatives. Co-leadership models were also regarded as having potential.

1.3.4.2.4 Grantmaking process

- Overall, while the Initiative was regarded by lead organisations as highly flexible in its design, aims and approach, some consultees felt this was not mirrored in the grantmaking process, which was experienced as more rigid than expected.
- It was recommended that the Initiative may require its own application and grantmaking processes, separate to the open programme, that better fit development phase ambitions and activities.
- As well, lead organisations expressed that, especially in this early phase of “finding things out”, agreeing delivery plans so far in advance can limit their ability to adapt to emerging insights.
- Longer-term, development funding for lead organisations would allow for a more adaptive, strategic plan to be developed.
- Speedier decision making on bids by the Heritage Fund would also help to maintain momentum in the Places.

1.3.4.2.5 Measurement and evaluation

- All stakeholders agreed that the ten-year timeframe provides a unique opportunity to track and establish impact of the Initiative (generating learning for similar and potential future interventions).

1.4 Delivery and Progress in Year One

This chapter begins with a brief overview of each of the nine Heritage Places before sharing reflections from lead organisations and area team consultees on early progress delivering the Initiative. It also reports on the performance of the Initiative, comparing grants and amounts awarded against budget allocations up to end March 2025. Finally, it shares the perspectives of consultees on success and success criteria in the early stages of the Initiative, as well as evidence of early, wider impacts.

The evidence presented is drawn from interviews with the lead organisations and Heritage Fund area team staff, as well as the Tranche One learning paper, prepared by the Heritage Fund's Heads of Engagement. This paper summarises the reflections of the six Heads on early implementation and, in referring to 'area team consultees', we include the perspectives of these Heads as well as those interviewed for the preparation of this report. Grantmaking data in Section 1.4.3 was supplied by the Heritage Fund, from its Information Management System (IMS).

The section summary signposts readers to key findings, which inform the conclusions and recommendations presented in Chapter 1.8.

1.4.1 Overview of the Heritage Places

The nine Tranche One Heritage Places were announced in October 2023. Following this announcement and in line with the staged approach described in Section 1.3.1, lead organisations in each Place were encouraged to bid for a 'development phase grant' of up to £250k to work collaboratively with local partners and stakeholders to explore and develop their plans for Heritage Places. Alongside this, bids for individual heritage projects and assets have been submitted and approved in some of the Places.

Table 1.1 we provide a brief pen portrait of each of the Places to contextualise the findings in the remaining chapters of the report. These portraits detail the lead organisations in each Place, summarise the emerging vision, indicate the geographical scale of the Heritage Place, and also whether the Place is a former Area of Focus. We also list projects funded to date, providing the decision dates of the awards, with the portraits ordered from earliest to latest first application. In-depth profiles of each of the Heritage Places are provided at Appendix 1.

Table 1.1 Overview of the Heritage Places

Heritage Place	Lead Organisation	Emerging Vision for Heritage Places	Projects to date
Neath Port Talbot (former Area of Focus)	Neath Port Talbot County Borough Council (NPTCBC)	Heritage Places will contribute to NPTCBC's Culture and Heritage Strategies and Corporate Plan. By 2030, NPT will be a nationally recognised destination for its high quality, accessible and varied offer of heritage, culture, arts and sport. This will contribute to improved wellbeing for local residents, helping to deliver all seven wellbeing goals of the Future Generation's Act. The culture of NPT and the Welsh language will thrive, and heritage, arts and sport will create skilled and satisfying jobs.	Dec-2023: A feasibility study into the restoration of the canal structure (NPTCBC, 01/01/2024-01/01/2025). Jun-2024: Working with heritage organisations to co-produce a model for volunteering between citizens and heritage sites (Tempo Time Credits Ltd., 06/01/2024-31/05/2026).

Medway	Medway Council (MC)	Medway will create and deliver a 10-year strategy for heritage which empowers local communities and the heritage sector with the skills and resources to lead sustainable heritage initiatives. The strategy and subsequent initiatives will reflect Medway's diverse place identity, drawing upon its rich and nationally significant maritime, military, and working-class heritage, along with its natural landscapes.	Feb-2024: Development phase grant (MC, 02/01/2024-31/03/2025) Feb-2024: Exploring the 'hidden' music / punk / DIY creative / LGBTQ+ heritage of Medway and specifically, the old high street Chatham Intra, focusing on engagement of young people (Electric Medway CIC, 06/05/2024-19/12/2025).
Stoke-on-Trent	Stoke-on-Trent City Council (SOTCC)	Stoke-on-Trent will be a vibrant, world-class city celebrating its unique heritage and ceramics legacy; recognised locally, nationally, and internationally. Heritage Places will champion community-led decision-making, entrepreneurship, and inclusive heritage, empowering residents to shape policies and initiatives. Young people will feel proud of their heritage, connected to their city, and inspired to stay, work, and lead positive change.	Feb-2024: Development phase grant (SOTCC, 01/04/2024-31/03/2026). Oct-2024: A place-oriented advanced leadership development initiative for mid to senior level leaders in the heritage sector (Staffordshire University, 01/01/2025-30/03/2028).
Torbay	Torbay Council (TC)	Heritage will contribute to Torbay becoming a healthier and happier place. Local residents, particularly young people, will be more strongly connected to Torbay's heritage, increasing pride in place and inspiring the next generation to take ownership of its heritage. The heritage sector will be more collaborative and resilient, and heritage-led regeneration will lead to wider appreciation of the value of heritage to the local economy and placemaking.	Feb-2024: Development phase grant (TC, 02/04/2024-31/03/2025). Apr-2024: Resilience funding to ensure the museum's sustainability (Torbay Museums Trust, 01/04/2024-31/05/2025). Jul-2024: Organisational resilience, audience and partnership development, (The English Riviera Geopark Organisation Ltd., 22/07/2024-30/04/2027).

Sauchiehall Street Culture and Heritage District (Glasgow City)	Culture and Sport Glasgow (Glasgow Life) and Glasgow City Council	Sauchiehall Street Culture and Heritage District Heritage Place (SSCHD HP) aims to restore, regenerate and celebrate the built and intangible heritage of the area. Through designation of the area as a dual culture and heritage district, SSCHD HP will leverage the street's cultural institutions, communities, and historical assets to boost pride in place, support the district economy, and make SSCHD a vibrant place to live, work and visit. SSCHD will align with the City Development Plan, and generate new models and approaches for heritage/culture-led regeneration.	Mar-2024: Development phase grant (Culture and Sport Glasgow, 01/04/2024-01/10/2025).
Armagh City, Banbridge and Craigavon Council Area	Armagh City, Banbridge and Craigavon Borough Council (ABCBC)	Armagh City, Banbridge and Craigavon Council Area Heritage Place will increase understanding, awareness and appreciation of the borough's diverse tangible and intangible heritage, by bringing new and established communities together to recognise and celebrate the borough's heritage as well as the distinctive cultural and community heritage of individual communities. It will strengthen the heritage sector, building capacity among local organisations across the borough.	Apr-2024: Development phase grant (ABCBC, 01/06/2024-30/11/2025)
North East Lincolnshire (former Area of Focus)	North East Lincolnshire Council (NELC)	Heritage Places will contribute to the delivery of North East Lincolnshire's Creativity Strategy, connecting communities to local heritage, and increasing pride and optimism within the area. A thriving and sustainable heritage sector will help to position NE Lincs as a heritage destination, where residents and visitors can explore stories and experiences that thread through its natural heritage, bridging natural heritage with North East Lincolnshire's rich cultural and built heritage.	Jun-2024: Development phase grant, building on the legacy from Area of Focus (NELC, 01/07/2024-31/03/2027) Nov-2024: Exploring options to protect the coastline's conservation sites, and increase access, inclusion and participation for local communities and visitors through an activities and education programme. (NELC, 01/01/2025-31/12/2026)

Shildon and Newton Aycliffe (County Durham)	Durham County Council (DCC)	The Shildon and Newton Aycliffe Heritage Place will recognise and celebrate the emotional and physical connection of local people with heritage: the transport heritage in both towns as well as the emerging heritage in Newton Aycliffe as a Post-War New Town. At the end of the 10-years, Shildon, the world's first railway town, will be on the journey to World Heritage Site status, children and young people and others will have access to heritage professions and skills, and sustainable heritage-led regeneration will have boosted the local economy.	Oct-2024: Development Phase Grant (DCC, 01/12/2024-30/06/2025)
Leicester	Leicester City Council (LCC)	An inclusive approach to heritage will strengthen shared identity, foster community pride, and enhance accessibility to Leicester's rich cultural history. The initiative will leverage Leicester's diverse heritage sites, traditions, and historical narratives to connect residents and visitors to its heritage.	Nov-2024: Development phase grant (LCC, 01/11/2024-30/11/2026)

1.4.2 Reflections on year one progress

The Heritage Fund area team consultees are satisfied with the progress being made in their Heritage Places, describing it as a 'slow burn', but nevertheless in line with their expectations and the way that the teams have communicated the Initiative to leads and stakeholders in the Places. Lead organisations have been encouraged to view the Initiative as a long-term commitment by the Heritage Fund to their local areas, and to take their time to scope plans with local stakeholders. Consultees accept that developing ideas at this scale, over this timeframe, and in collaboration with local stakeholders does not happen quickly; especially in areas where relationships between the local authority and local stakeholders are starting from a less established position.

This chimes with the views of the lead organisations about their own progress. Many describe their current position as one of 'getting started' and 'getting to grips' with what it means to be a Heritage Place. This reflects the open and flexible nature of the Initiative, and the focus on stakeholder and community engagement in the majority of the Places. Some consultees reflected that more guidance from the Heritage Fund on what Heritage Places means to them, and their stakeholders, would be beneficial; although all embraced the opportunity to explore this internally, and with local partners and stakeholders during their development phase projects.

"Still struggling a bit to find a new methodology. How do you put some boundaries around it in order to get something focused enough to make a difference? But, that's worth it because we get the chance to blur the lines and do something different, because that's what we need for this particular problem. So heritage as a regeneration tool. This is a really interesting thing for us to find a different way of working." – Lead organisation consultee

"It is about us getting to grips with what we are trying to get out of this." – Lead organisation consultee

Getting the right resource in place to deliver the first programmes of activity has delayed progress in some of the Places, with recruitment and appointment of staff and consultants taking more time than anticipated. This appears to have been less of a challenge in the former Areas of Focus where Heritage Places has come along at the right time to continue some of the existing posts. However, across all the

Places, staff and consultants are now either in post or will be in post imminently, and lead organisation consultees felt that these processes have resulted in strong appointments.

In general, consultees emphasised that development phase work is about the journey, as much as the output - building relationships and capacity within sector, with communities, and across local authority departments. This was viewed as crucial to achieving long term sustainability. The specific activities underway include establishing governance models, mapping heritage assets and opportunities, developing strategies for heritage and frameworks for Heritage Places delivery, mapping wider initiatives and their alignment with Heritage Places, and undertaking community consultation. This also includes establishing internal mechanisms within the local authority, such as officer steering groups, to improve alignment between key teams and departments.

"All of this sets really, really strong foundations for the kind of relationship that we want to encourage the heritage community to have with each other." – Lead organisation consultee

"Heritage Places has enabled really good cross working between planning, historic environment, culture and events. I almost feel like they're my team and the way that the Council structures culture and heritage is like they're in two separate directorates. So yeah, I think Heritage Places has really enabled us to work more efficiently across those different departments in order to be able to deliver." – Lead organisation consultee

Whilst this strategic work is ongoing, some lead organisations are already starting to plan and develop solutions to the issues they are uncovering, including creating programmes and funding opportunities to support skills and sector growth, programmes and toolkits which support groups interested in community asset transfer of historic buildings and spaces, and undertaking feasibility studies and business plans for specific assets. Establishing a visible presence for Heritage Places in local areas has been a focus in two of the Places, with plans in motion to establish local hubs in Stoke-on-Trent in the five towns, and Glasgow taking on a temporary let on Sauchiehall Street to act as a 'shop front' for the project. The management of seedcorn grants is proving challenging for capacity in some places, reducing time for strategic planning and internal team development and therefore delaying delivery of the longer-term objectives of the development phase.

In Glasgow, the two leads are delivering activity via a two-pronged approach, to progress both short and longer-term objectives and maintain momentum. Glasgow Life (Culture and Sport Glasgow) has established project visibility via branding, communications and marketing, its 'shop front' on Sauchiehall Street, cultural and heritage programming of the district, and has commissioned the University of Glasgow to map intangible heritage as the basis for future programmes of activity. Glasgow City Council is driving some forthcoming quick wins through the restoration of small-scale, but culturally significant, heritage assets, while working with partners to map physical heritage assets and opportunities for capital investment. This has identified a large capital project that the city council believes it can drive quickly alongside development phase activity.

Consultees in Glasgow report a stronger desire now coming from the Heritage Fund to see visible changes quickly. Whilst Glasgow is responding to this positively and enthusiastically, and is keen to be an exemplar Place, they highlighted that moving on capital projects with partners is slow, each of whom have their own governance mechanisms, risk analysis, and decision-making processes to clear.

"We've taken a bit of time to define it, put boundaries on it – now the Heritage Fund want us to get on with it .... In a positive way – they want us to be an exemplar as an early starter." – Lead organisation consultee

In terms of local partnerships, local universities are emerging as key partners, with funding awarded in two Places for research projects focusing on digital participation, digital archives and storytelling, and heritage skills, while others are also considering how to access university expertise as a means to growing the evidence and skills base. Finding partners and models to support engagement with young people is also a focus where this target group has emerged as a priority.

In the former Areas of Focus, consultees report a more 'business as usual' approach, building on the strategies, evidence and mechanisms established through Areas of Focus to think about specific projects

to deliver their ambitions as a Place. However, one lead organisation in the Areas of Focus expressed concerns that there was not yet a joined-up approach to the Initiative funding process, and was unaware of what other projects were being funded, or in the pipeline, in their area and the 'triage' process for applications.

"We haven't been given this money [the local authority]. This is a notional amount of money for a Place. So, there's no sort of project plan if you like, you know, it goes back to that, action plan … there's been no real discussion yet about how we're embedding it locally and how we're making those discussions and those links; that hasn't happened really. That does need to happen." – Lead organisation consultee

In terms of solutions to some of the challenges the Places are encountering, one Place with low prior experience of the Heritage Fund is continuing to access RoSS consultant support to help navigate roles and responsibilities of staff. Another suggested that the Heritage Fund consider offering new Tranche Two Heritage Places a starter grant, to appoint a freelancer who can keep establish and maintain momentum with communities and stakeholders while the lead organisations focus on strategic activities.

Some places are thinking about wider impact already, and how Heritage Places projects can provide insights in place-based approaches that can be used elsewhere. The opportunity to trial new ways of working was welcomed in the context of wider place policymaking.

"Moving our practise on that, that's what the lottery's done for us throughout the years. We'll move the practise on and that will help us with all the rest of the city centre as well." – Lead organisation consultee

1.4.3 Grantmaking performance

Up to end December 2024, the Heritage Fund has awarded 15 grants in Tranche One over 11 months, between 5th December 2023 and 8th November 2024, with Neath Port Talbot (a former Area of Focus) the first to apply and receive an award, and Leicester the last. Six of the nine Places have had more than one award, with Torbay representing the highest share of awards, standing at three of the 15. Collectively, these awards represent an investment of £3,492,456 in 2023/4 and 2024/25 against a budget allocation of £23m for the two years, with three months remaining of year two.

This illustrates a disparity between expectations at the Initiative's inception compared to actual investment and delivery in the Heritage Places so far. The various influences and challenges in local implementation are discussed further in Chapters 1.4 to 1.7. However given the difference in the actual and forecast expenditure, these influences are unlikely to account completely for the variance observed. This suggests that grantmaking performance reflects a combination of implementation and intervention challenges i.e. that the investment has not been profiled realistically across the 10-year period at the outset.

Table 1.2 Overview of Heritage Places Strategic Initiative grants awarded up to 1st January 2025

Decision Date	Place	Organisation Name	Grant Awarded	Organisation Type	Heritage Area	UK Area
05/12/2023	Neath Port Talbot	Neath Port Talbot County Borough Council	£113,850	Local authority	Industrial, Maritime and Transport	Wales
07/02/2024	Medway	Medway Council	£249,900	Local authority	Other	London and South
15/02/2024	Stoke-on-Trent	Stoke-on-Trent City Council	£249,332	Local authority	Other	Midlands and East
19/02/2024	Medway	Electric Medway CIC	£89,250	Registered company or CIC	Cultures and Memories	London and South
22/02/2024	Torbay	Torbay Council	£244,800	Local authority	Other	London and South

Decision Date	Place	Organisation Name	Grant Awarded	Organisation Type	Heritage Area	UK Area
27/03/2024	Glasgow City	Culture and Sport Glasgow	£350,000	Other public sector organisation	Areas, Buildings and Monuments	Scotland
02/04/2024	Torbay	Torbay Museums Trust	£250,000	Registered charity	Museums, Libraries and Archives	London and South
29/04/2024	Armagh City, Banbridge and Craigavon Council Area	Armagh City, Banbridge and Craigavon Borough Council	£238,798	Local authority	Areas, Buildings and Monuments	Northern Ireland
04/06/2024	Neath Port Talbot	Tempo Time Credits Ltd	£249,938	Registered charity	Areas, Buildings and Monuments	Wales
10/06/2024	North East Lincolnshire	North East Lincolnshire Council	£250,000	Local authority	Cultures and Memories	North
03/07/2024	Torbay	The English Riviera Geopark Organisation Ltd	£249,935	Registered company or CIC	Landscapes, Nature and Parks	London and South
11/10/2024	County Durham	Durham County Council	£250,000	Local authority	Industrial, Maritime and Transport	North
11/10/2024	Stoke-on-Trent	Staffordshire University	£206,658	Other public sector organisation	Museums, Libraries and Archives	Midlands and East
07/11/2024	North East Lincolnshire	North East Lincolnshire Council	£250,000	Local authority	Landscapes, Nature and Parks	North
08/11/2024	Leicester	Leicester City Council	£249,995	Local authority	Cultures and Memories	Midlands and East

1.4.4 Defining success in year one

Success, at this early stage, was understood by area team consultees in terms of the increased awareness of the Heritage Fund in local areas, the mapping of key stakeholders, and the preparatory work that is now underway in each of the Heritage Places as a result of successful first applications by lead organisations. In Leicester, designation as a Heritage Place and the relationships forming with the Heritage Fund, have encouraged the local authority to apply to the open programme for a major capital project which was not in the Heritage Fund's pipeline prior to the Initiative. This is considered an important indicator of success in this Place, where investment by the Heritage Fund has been particularly low historically.

Success is invariably described by the lead organisations in terms of early strategic wins and impact. The evidence they provide of success includes changing narratives about heritage both within the senior leadership of the local authority as well as more widely, among communities and stakeholders in the Places. Medway attributed greater involvement of the leader and portfolio holder in heritage and regeneration discussions to the Initiative, while Glasgow reported a positive response in the press to the Sauchiehall Street Culture and Heritage District (SSCHD) after a period of public disquiet and negativity in the media about the street's declining fortunes.

Many of the Places described improved strategic alignment and relationships, internally between local authority teams and departments, as well as with the wider heritage community and stakeholders.

“It is the opportunity [the Initiative] that's done it. It's given us the thing to gather around to make that happen. I think that's been massive.” – Lead organisation consultee

“Heritage Places is the thing that's working best here. It really feels like a lifeline, if I'm honest. The team, we've got the right team of people in place, we've got the right attitudes. It's like turning a tank around, but we are shifting attitudes towards engagement and what heritage is and what it can do.” – Lead organisation consultee

Medway’s skills development programme for the sector is starting to demonstrate measurable impact, in terms of confidence and capacity and new applicants coming forwards for funding. Developing resilience and a partnership approach was regarded as especially important in the context of changes to local government’s placemaking role arising from the change in government, and the need to manage any transitions and changes in the structures for local and regional governance of placemaking and delivery of services.

In most places, community engagement has not yet begun in earnest, however consultees felt this would be a key success measure of this initial development phase, raising awareness and understanding of the Initiative and heritage more generally, and strengthening the local evidence base to inform subsequent strategy development and project proposals. Some Places are aligning with forthcoming celebrations in their areas, such as major city and town anniversaries, to leverage these ‘tentpole’ moments to engage communities more broadly in heritage conversations for Heritage Places.

Generally, reaching a point by the end of this phase where the priorities and opportunities for investment are more clearly mapped out was considered the key success criteria:

“I'd always seen this first stage of setting up as a strategic, ‘here's where we are, here's the big opportunities’. It wasn't for me thinking about which ones we’re going to prioritise right now, but we're sort of saying here's the ecosystem. Here's all the stuff that's good. And actually, these things work together well ... So I think we're doing that.” – Lead organisation consultee

Figure 1.3 Cleethorpes promenade and beach (North East Lincolnshire Heritage Place)

Throughout this phase, lead organisations have been getting to grips with how to balance the short-, medium- and long-term goals that all add up to the Initiative’s strategic aims and ensuring a steady stream of investment and activity. Glasgow reflected that their outlook towards the investment has changed since starting to deliver their first project. Having initially envisaged applying for a large grant after their development phase to encompass the full programme of work up to 2033, they are now

adopting a more fluid approach to maintain a steady momentum in SSCHD, viewing this as critical to success. Likewise, in the Areas of Focus, success was understood as maintaining the momentum and engagement from this prior initiative, including the extension of key posts, and continuing with the direction of travel regarding sector development.

However, all area team consultees recognised that expectations of progress and success may not be shared across the organisation, reporting expectations from the Board that the Places would be further into delivery by this point in time and that the geographical scale of some of the Places may present a heritage need that is too great for the Initiative to achieve meaningful place impact.

"There was a feeling that things would happen very quickly, but of course it does take time, working in places, it does take time. You don't get immediate impact … It takes time in order to plan that and programme that, get all the stakeholders and everyone involved in that." – Area team consultee

1.4.5 Wider impacts

Consultees reported some wider impacts at this stage from the process. In Medway, an indirect impact of the process has been the identification of the need to reevaluate the visitor economy and tourism infrastructure, which emerged strongly from sector engagement, even though it was not initially a top priority. Stoke-on-Trent spoke of strengthened strategic relationships with other NDPBs that are working in a place-based approach, such as Historic England and ACE, as well as local philanthropic networks in the area, where the local authority has been using the emerging strategy and prospectus to build the case for investment. The network now has a rationale and investment opportunities to promote. Glasgow reports interest from other local authorities and organisations in the models and approaches that are emerging from SSCHD, and how they can learn from and potentially replicate these.
Increased collaboration and understanding between local heritage organisations have been observed in County Durham, and new organisations are approaching the local authority with an interest in heritage and the Initiative.

"Already they're starting to support each other and go, 'Yes, you need this, or this would help you.'" – Lead organisation consultee

1.4.6 Summary: Delivery and Progress in Year One

1.4.6.1 Overview of grantmaking

- All nine places have been awarded at least one grant to date. The number of grants in each Place ranges from one to three.
- Eight of the nine lead organisations applied for a 'development phase grant' in year one, and are working collaboratively with local partners and stakeholders to explore and develop their plans for Heritage Places as described in the Initiative design. These range in length from seven months (County Durham) to 33 months (North East Lincolnshire). The average length is 19 months.
- Alongside the development phase grants, seven bids for individual heritage projects have been submitted and approved, in five of the Heritage Places.
- In total, there have been 15 awards spanning December 2023 to November 2024.

1.4.6.2 Reflections on year one progress

- Area team and lead organisation consultees are satisfied with the progress made in year one, which they agree reflects the time needed to prepare for such a long-term investment. Lead organisations value the opportunity to work at their own pace, in collaboration with local partners and stakeholders. They emphasise that long term sustainability depends on the quality of the foundational work they do now during their development phase.
- Development phase activities have focused on the governance of Heritage Places, heritage mapping, stakeholder and community consultation and evidence gathering, internal departmental alignment within the lead organisations, and strategy or framework development to guide delivery of Heritage Places over the longer-term.
- Alongside these strategic activities, some Places are starting to respond to known or emerging issues for heritage, delivery of the Initiative, in their areas. Sector capacity building, feasibility studies, options appraisals and establishing physical premises and visibility for Heritage Places have been the focus of these projects and activities.

- Challenges with recruitment and appointment of staff and consultants have been responsible for most of the delays encountered in the Places, although this has presented less of a challenge in the former Areas of Focus where some of the existing posts could be extended.
- Some Places are reporting a perceived shift in the Heritage Fund's expectations of progress, with greater encouragement to start developing capital proposals now, which deliver tangible benefits for heritage.
- The need to balance short and longer-term objectives is therefore being increasingly prioritised in some of the Places, with quick wins to improve the condition of heritage assets an important component of activities in these Places alongside investment in longer term scheme planning.
- The administration of seedcorn grants by lead organisations is labour intensive in some places. Community Foundations in local areas could be approached to explore alternative mechanisms for the management of such grant programmes, to protect lead organisation capacity.
- The former Areas of Focus are building on previous investment in capacity-building, infrastructure and strategy development, to drive forward their heritage priorities. While these areas are in the minority in Tranche One, the Heritage Fund should remain in step with their journeys and consider how bids from other, non-lead applicants in these Places are joined up with, and communicated to, lead organisations.
- Additional support to Tranche Two Places could include ongoing RoSS support during the development phase, and the provision of 'starter grants' which can be processed quickly to resource ongoing stakeholder and community engagement, and safeguard resource in the lead organisations for strategic work.
- The opportunity to trial new approaches through Heritage Places has been welcomed, as an opportunity to push forward the practice of lead organisations.

1.4.6.3 Grantmaking performance

- Initiative grantmaking up to end December 2024 amounts to £3.5m compared to an allocation of £23m up to end March 2025.
- Local delivery challenges are unlikely to fully account for a variance of this magnitude. This suggests that the Heritage Fund's profiling of the budget across the 10-years needs to be revisited, in order to account for a 'slower burn' during the development phase of delivery.

1.4.6.4 Defining success in year one

- For area team consultees, success in year one is indicated by increased awareness of the Heritage Fund in local areas, mapping of key stakeholders, and the commencement of development phase activities by the lead organisations.
- New applications to the open programme during year one, prompted by designation as a Heritage Place, also indicate success in strengthening relationships where the Heritage Fund has low levels of prior investment.
- Early strategic wins are cited by lead organisations as the primary indicators success. They provide examples of changing perceptions of heritage – among local leaders and communities – as well as greater internal alignment between teams and departments within the local authority, and improved relationships with local stakeholders.
- Impacts on the wider heritage sector are emerging in some places, in terms of the benefits of skills development programmes.
- Most Places are yet to embark upon widespread community engagement, but many identified this as a key milestone, and the impacts anticipated in terms of awareness and understanding of local heritage and Heritage Places.
- Alongside other strategic activities in the development phase, community engagement will contribute to what is regarded as the key success criteria for this stage in the journey by many of the Places – the mapping of priorities and opportunities for investment for the remaining period of implementation.
- Successfully balancing the short, medium and long term objectives of the development phase was also regarded as key to success, to ensure that momentum and engagement with the Initiative is not interrupted.
- Definitions of success are not necessarily shared however throughout the Heritage Fund, with Board expectations of progress ahead of the actual pace of progress in the Heritage Places.

1.5 Key Contextual Factors in Year One

Exploring the role of context is particularly important in place-based evaluations, since variation in local contexts and how they interact with interventions is central to the rationale for taking a place-based approach. Differences in local context also account for the variation in 'start positions' for the Heritage Places, and can generate learning for the Heritage Fund regarding the optimal conditions for place-based investment as well as helping to explain variation in the nature and scale of outcomes over time.

In this chapter, we share the findings from interviews with lead organisations and area teams on the dimensions of local context that are considered to have shaped delivery approaches at this early stage of the Initiative. We combine these insights with secondary, quantitative data to identify those aspects of local context which have been most influential on implementation in year one.

These dimensions of context encompass observable features of places (e.g. population characteristics or the scale and condition of local heritage) as well as relational and dynamic features (e.g. narratives and attitudes to place). They also encompass the inner context of organisations (e.g. of the key partners in each Place) as well as the outer context in which interventions occur (e.g. place networks, policies, funding, leadership).

1.5.1 Reflections on context from the Heritage Places

1.5.1.1 Local policy context

Heritage Places has been welcomed in all the Places, as a delivery vehicle for a variety of local strategies and plans. For some, the formulation of a specific heritage strategy is regarded as a necessary building block before specific proposals can come forward, and this will be the primary output of the development phase grant where strategies are not currently in place. In one Place, the lead organisation has found having separate culture and heritage strategies unhelpful prior to the Initiative, and a new joint strategy is being commissioned which will inform Heritage Places investment. In others, broader cultural and creativity strategies are considered sufficient to guide a delivery plan or framework for Heritage Places. Regeneration plans for particular settlements or districts provide another key policy framework in two of the Places, where, from the outset, the lead organisations have focused their Heritage Place at a smaller geographic scale.

In all of the Places, lead organisations report that the processes for developing these founding strategies have, to varying degrees, helped to align key internal and external stakeholders around shared ambitions for the place and its heritage. City of Culture bids were also identified as positive processes in this respect.

1.5.1.2 National political and economic context

Area team consultees acknowledge that changes in external conditions may be holding back more ambitious activity. The economic climate, the deteriorating position of local government finances, and the change in government, were regarded as contributing to uncertainty and caution in the Places in pressing forward with larger capital projects, than otherwise may have been expected when the Initiative was first conceived.

1.5.1.3 Partnership working and infrastructure

Area team consultees regarded experience and infrastructure from previous area-based schemes, such as Area of Focus, as beneficial in expediting progress since ways of place working are established and the heritage community has benefited from five years of capacity building investment.

Consultees also highlighted the influence of the local political context, in terms of the relationships between different tiers of local government and with local stakeholders, particularly in polycentric and rural areas, and the added complexity this can entail in reaching agreement on initial priorities and plans. Political change at the local level has also been disruptive in one of the Places, although this was considered to offer a positive opportunity to 'reset' some difficult relationships locally between the local authority and the heritage community.

Lead organisations reported that relationships with larger, anchor heritage organisations have been strengthened by previous initiatives and cultural and heritage policymaking. However, this prior engagement has often not reached as deeply into the 'grassroots' level, in order to be able to move forwards confidently yet with specific proposals. In some places, relationships with grassroots organisations are quite fragile, owing to the political context in the Places and/or prior local authority initiatives and decisions that have not had support from these organisations.

There is infrastructure in place, or emerging, in some of the Places, to support these grassroots stakeholders to participate in the design, visioning and delivery for Heritage Places. Heritage Development Trusts and Cultural Compacts were among the mechanisms highlighted, alongside more informal networks and fora. Where no such, or weaker, mechanisms exist, the Places are at the start of a longer journey to build these relationships as well as the capacity of these organisations to engage. Where strong mechanisms do exist, invariably the lead organisations continued to identify a strong need for further capacity building to prime these wider partners for co-delivery of Heritage Places, indicating that even where mechanisms are in place, the Initiative is raising the level of ambition and expectation.

Figure 1.4 Berry Head (Torbay Heritage Place)

1.5.1.4 Wider local initiatives

In terms of wider initiatives, investments and levers in the Places which frame the Heritage Places programme, the broader cultural ecosystem is a significant driver of emerging plans and priorities. Designation as an Arts Council England (ACE) Priority Place, ACE's Place Partnerships programme, the legacy from City of Culture bids and more localised cultural infrastructure are providing the outlines for early thinking in these Places and how synergies between culture and heritage can be harnessed by Heritage Places. In Glasgow, an ongoing programme of public realm improvements on Sauchiehall Street is improving the physical infrastructure to support Heritage Places in establishing a Culture and Heritage District along and adjacent to its route. Experience from Heritage Action Zones and Townscapes Heritage are also formative in some of the Places.

In some places, Shared Prosperity Fund (SPF) funding was being deployed to support local heritage ambitions prior to Heritage Places. However, one lead organisation highlighted challenges in aligning SPF investment with Heritage Places due to asymmetry in the funding timeframes. This consultee highlighted projects which have been funded through SPF which, in the absence of SPF, would have likely formed proposals for Heritage Places, but that more streamlined funding processes have positioned SPF as the preferred funding vehicle.

1.5.1.5 Local heritage

The scale and condition of built heritage was also regarded as a contributory factor in determining how quickly viable schemes for physical heritage might come forward, and the varying degree of challenge facing local partners in coming forward with specific proposals that are agreed as priorities by local stakeholders. The ethnic, age and socio-economic profile of the Places also influences the focus for heritage in the Heritage Places, as well as the level of established capacity and capability locally to explore diverse community and cultural heritage, and what this means for place identity and attachment.

The extent to which local heritage has currency with local people was also regarded as important in prioritising schemes in Glasgow. SSHCD was described as 'making sense' to local people as a location for a culture and heritage district. There is also a functional social, economic and cultural geography in SSCHD within which a culture and heritage district can take shape. Designation of the district as a dual culture and heritage district allows partners to explore where Initiative investment can maximise impact amid this interplay, and density, of heritage, cultural, social and economic activity.

1.5.1.6 Local authority relationships and reputation

The public image of the local authority among communities and stakeholders, and thus the association of any new initiative with the local authority, may also be a factor in the initial approaches being taken in some of the Heritage Places. Intensive 'bridge building' activities with stakeholders and the appointment of specialists to carry out consultation and audience development activity are among the approaches being taken in some of the Places to improve relationships and work through these relational challenges between the local authority, stakeholders, and communities.

1.5.1.7 Resource and capacity

Capacity in the lead organisations was identified by area team consultees as a key barrier to delivery. Even under business-as-usual conditions, new local authority-led projects and initiatives take considerable time to launch and embed. Add to this the financial challenges local authorities currently face, and it is not unexpected that project proposals for specific assets have not yet been forthcoming. Some of the lead organisations also have large, capital projects in the open programme pipeline which dilutes already limited capacity. Staff churn and constraints on recruitment are also impacting local authority capacity, and their ability to recruit and clear permission to start processes.

This was also a key theme in our consultations with the lead organisations. Lead organisations expressed fundamental concerns about their capacity to lead the Initiative long-term given the scale of local heritage needs, particularly in Places where the geographical scope of the Initiative remains very broad. Local authorities highlighted that they cannot always carry the risk of larger projects, especially with the size of the teams currently in place. They regard Heritage Places as an opportunity to provide capacity-building support to widen the pool of viable organisations that can lead more ambitious projects. This also reflects the broader perspective of the leads, that they are ultimately the facilitators of Heritage Places, and a conduit for a place and partnership-led, rather than local authority-led, response to the investment.

1.5.1.8 Political commitment

Reflecting on the differences between lead organisations in their Places at this early stage and the progress that has been made, area team consultees highlight the importance of political leadership and commitment to heritage, and recognition of both its intrinsic and extrinsic value to placemaking. Consultees suggested that the scale of investment in heritage by the local authority can provide a useful proxy for the strength of this leadership.

The level of local political support and endorsement for heritage and the Initiative across the Places was generally described as high however by lead organisation consultees, although the level of national government support was highlighted as a critical issue to influence in one Place. Where Places report more local challenges in this respect, these relate to awareness of the breadth of heritage and its value beyond high profile, built heritage assets.

1.5.1.9 Heritage roles, responsibilities and relationships

Where partnership delivery for heritage is less well established, area team consultees report greater challenges initially in resolving roles and responsibilities between partners. More importantly however are

the individual people in the lead organisations, their skills and experience to establish traction and make progress, and whether there are key posts and teams in place with a track record of delivery in conservation, community engagement ,and the types of heritage emerging as priorities in the Places.

Within the lead organisations, the strategic leads for Heritage Places are invariably the culture and heritage teams of the local authority although in Glasgow this service is delivered at arms-length by a Community Interest Company (CIC) spun out of the local authority's former culture and leisure service. In one place, the lead sits within the regeneration team. The extent to which culture, heritage and regeneration are integrated and aligned to deliver for places varies. Where there are established working relationships and common values or approaches to placemaking across these teams as well as a track record of joint delivery, consultees viewed this as a key success factor in the progress being made and the place-based delivery models that are emerging.

1.5.2 Place features and characteristics

In Section 1.5.1, qualitative testimony from lead organisations and Heritage Fund staff is presented to explore the influence of local context on implementation. This section presents quantitative analysis and interpretation of the Heritage Fund's IMS data[2], Place Index scores and rankings, and local area statistics on pride in place and place attachment, to further probe how, and to what extent, the differing 'starting positions' of the Places influence implementation in relation to the aims and drivers of the Initiative. Place Index scores and rankings, and local area statistics on pride in place and place attachment, to further probe how, and to what extent, the differing 'starting positions' of the Places influence implementation in relation to the aims and drivers of the Initiative.

At this early stage, it is only possible to draw out tentative conclusions about the influence of wider conditions on the Initiative's implementation and success in the Places. The evaluation will revisit these datasets over time, together with primary evidence gathered through the evaluation, to build a richer picture of how place features and characteristics influence delivery approaches and outcomes at different intervals over the 10-years of delivery.

It should also be noted that using quantitative measures of place context confronts many of the same limitations as those encountered in the development of the Place Index, which are set out comprehensively in the Heritage Fund's Place Index methodology and summarised in Annex A: Evaluation Design.

The development of quantitative measures of local context is an evolving area of interest and learning from the evaluation. As the Heritage Fund increases its understanding of what success looks like at different stages of the Initiative and the conditions for success in the Places at these stages, the purpose served by any additional measures can be explored and tested. Beyond the data sources included below, in Annex A: Evaluation Design we discuss how ERS might work with the Heritage Fund to further progress this component of the evaluation, and support learning at the Heritage Fund about how wider conditions in Places influence delivery and impact.

1.5.2.1 Place capacity for place-based, collaborative delivery at scale

In this section, we explore the 'starting positions' or 'readiness' of the Places to work at scale, using the Heritage Fund's IMS performance data to establish proxy measures which benchmark the Places at the outset of their Heritage Places journey:

- Heritage Fund investment in the Places by **size of grant** – to explore starting positions in relation to local organisational capacity and the Heritage Fund's ambition to invest at scale.
- Heritage Fund investment in **partnership delivery** – to explore starting positions in relation to the collaborative approach encouraged in the Places.
- Heritage Fund investment in **place-based delivery** – to explore starting positions in relation to place-based working and capacity.

In Figure 1.5 (overleaf), IMS data from 1995/96 to 2024/25 is used to calculate the average delivery **grant size** for each of the Places as well as for the whole Heritage Fund portfolio. Since there are no distinct

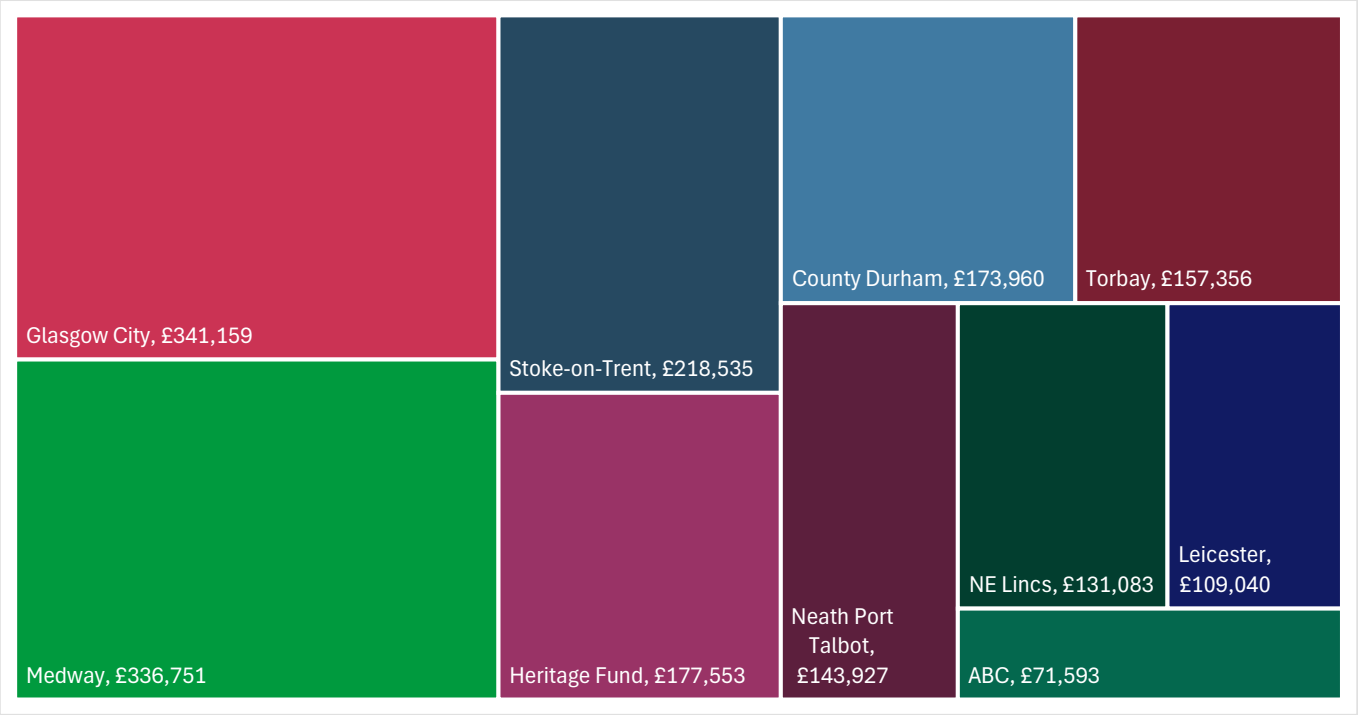
[2] Heritage Fund grantmaking performance data from 1995/96 to 2024/25

grant bands in the £250k to £10m range, we have calculated the average grant size, rather than averages for grant bands, in order to improve granularity of the analysis.

For the entire Heritage Fund portfolio, the average size is £177,553. Across all the Places, only three of the average grant sizes are above the Heritage Fund average, with Glasgow and Medway roughly double the average at £341,159 and £336,751 respectively. Stoke-on-Trent is also higher than the average at £218,535. Of the remaining six Places, County Durham maps closely to the average at £173,960, with Torbay and Neath Port Talbot coming in just below at £157,356 and £143,927 respectively. Both Leicester and Armagh City, Banbridge and Craigavon Council Area (abbreviated to ABC in figures below) are far below the average for the Heritage Fund, at £109,040 and £71,593 respectively.

Added to the qualitative contextual insights at Section 1.5.1, this provides a further indication of the starting position in the Places in terms of local capacity to work at scale, and those Places and local partners which may need more time and support to develop larger-scale projects.

Figure 1.5 Treemap showing the average project grant size of all nine Heritage Places compared to the average for the Heritage Fund.



The figures in Figure 1.6 have been calculated with Heritage Fund data as of January 13th, 2025. The number of projects that had been awarded to each of the nine Places since the 1995-96 financial year can be seen in Table 1.3 below.

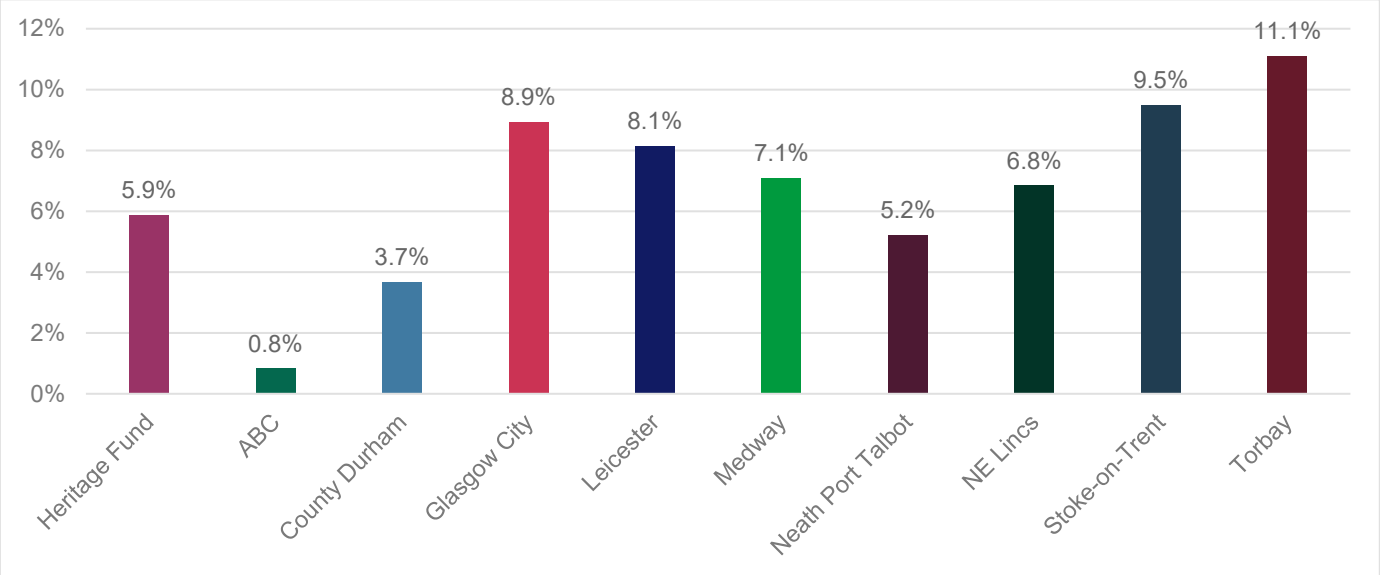
Table 1.6 The total number of grants awarded to the nine Heritage Places between 1995-96.

0	ABC	County Durham	Glasgow City	Leicester	Medway	Neath Port Talbot	North East Lincs	Stoke-on-Trent	Torbay
Number of projects	267	745	503	274	184	125	127	153	120

The percentage of **projects delivered in partnership** for each place and the Heritage Fund is outlined in Figure 1.7 (overleaf). The average percentage of partnership delivery for the whole Heritage Fund portfolio is 5.9 per cent. Torbay has a much higher percentage than the average at 11.1 per cent. This is closely followed by Stoke-on-Trent (9.5 per cent), Glasgow City (8.9 per cent), and Leicester (8.1 per cent). Medway and North East Lincolnshire were marginally higher than the average at 7.1 and 6.8 per cent respectively, with Neath Port Talbot marginally lower at 5.2 per cent. County Durham is lower still at 3.7 per cent while Armagh City, Banbridge and Craigavon Council Area has a much lower percentage of projects delivered in partnership, with only 0.8 per cent.

As an indicator of the extent to which collaborative working is embedded in the Places, this is encouraging since two thirds of the Places have a stronger track record of partnership delivery compared to the whole Heritage Fund portfolio. Armagh City, Banbridge and Craigavon Council Area is starting from a more challenging position, and this is reflected in testimony from the lead organisation regarding the strength of wider infrastructure and the history of collaborative working in the local heritage community.

Figure 1.7 Percentage of projects delivered in partnership in each Heritage Place, alongside the Heritage Fund as a whole



In terms of **place-based project delivery**, Table 1.4 below indicates the number of place-based project grants awarded historically in each of the nine Places. In defining a project as 'place-based', we adhere to the conventions used in the research report commissioned by the Heritage Fund to inform the Initiative. In line with this prior analysis, the data covers the 2013-2024 period only. Placed-based projects within the 2013-2018 period were identified through their funding mechanism i.e. whether they received funding via one of the following programmes: Future Parks Accelerator; Great Place Scheme; Heritage Enterprise (inc. Capital Kickstart); Landscape Partnerships; Parks for People (inc. Project Planning); and Townscape Heritage. From 2019 to 2024, projects are defined as place-based if they were assessed by the Heritage Fund as having contributed to one or both of the open programme's place-based outcomes (community improvement and local economy boost) during this strategic period.

When combined, there were 2651 place-based projects between 2013 and 2024. 153 of these were located within the nine Heritage Places – the distribution of which can be seen in the table below. We also indicate whether the share of place-based projects in each place is higher, or lower, than the average for the whole Heritage Fund portfolio which was calculated in the prior analysis to stand at 6.2%.

Only Torbay demonstrates a (marginally) lower-than-average proportion of place-based projects which indicates that the majority of Places are well positioned for place-based working via Heritage Places. Glasgow City and County Durham are in particularly good stead, with place-based project shares of 19 per cent and 16 per cent respectively. Interestingly, these are the two Places which have decided to focus at a lower spatial tier from the outset and which demonstrate the strongest alignment in year one with local regeneration plans. Both partners cited the achievement of meaningful, placemaking impact as the rationale for this decision. This may in part reflect cumulative experience and learning from previous place delivery among both local partners and area teams over the previous two strategy periods.

Table 1.4 Place-based project history in the nine Heritage Places in the 2013-2024 period

0	Number of place-based projects	Percentage of Place-based projects (by number, out of 9 HP Places) (%)	Higher or lower than whole Heritage Fund portfolio (6.2%)
ABC	15	10%	Higher
County Durham	25	16%	Higher
Glasgow	29	19%	Higher
Leicester	16	10%	Higher
Medway	12	8%	Higher
Neath Port Talbot	20	13%	Higher
NE Lincs	12	8%	Higher
Stoke-on-Trent	15	10%	Higher
Torbay	9	6%	Lower
Total	153	100%	N/A

1.5.2.2 Place capacity to deliver across the breadth of heritage

In this section, we explore the 'starting positions' or 'readiness' of the Places to deliver across the breadth of the heritage, using the Heritage Fund's IMS performance data to establish proxy measures which benchmark the Places at the outset of their Heritage Places journey:

- Heritage Fund investment in the Places by heritage type – to explore starting positions in relation to the aim to create schemes across the breadth of heritage.

Figure 1.8 (overleaf) outlines the percentage of awards for each **heritage classification** for all the Places as well as for the entire Heritage Fund portfolio, and the Initiative (all nine Places). The Initiative data set is included in the year one report alongside the data for each Place as it has not yet been made explicit by the Heritage Fund whether individual Places are expected to develop schemes across the breadth of heritage, or whether this ambition relates only to the Initiative as a whole.

To simplify interpretation of the data, the heritage classifications have been abbreviated to include only the name of the first heritage type within the classification e.g. Areas, Buildings and Monuments will be referred to as 'Areas', and Museums, Archives and Libraries will be referred to as 'Museums'. Across the Heritage Fund portfolio, 'Areas', 'Museums', and 'Landscapes' make up 85 per cent of total funding, at 36 per cent, 26 per cent and 23 per cent respectively. The distribution of funding by heritage classification for the individual Places varies from this, reflecting their distinctive local needs and heritage.

In summary:

- **Armagh City, Banbridge and Craigavon Council Area** displays a majority of awards for Areas, making up 58 per cent of total awards. 32 per cent of prior awards is split between Museums and Industrial, with a small percentage invested in Community and Other.
- **County Durham** maps closely to the Heritage Fund average, with all classifications slightly below the average other than Landscapes, which is marginally higher at 32 per cent.
- **Glasgow City** has a large majority of awards going to Areas and Museums, with a combined 80 per cent. Of the remaining 20 per cent, 11 per cent is for Landscapes, with the rest split fairly evenly.
- **Leicester** also has a large amount of awards going to Areas, with the second largest being Landscapes. Museums comprises 13 per cent of all awards, roughly half of the average across the Heritage Fund. Community and Other constitute a larger percentage than the average, at 10 per cent and 11 per cent respectively.
- **Medway** is represented by a large percentage of awards going to Industrial at 43 per cent, most likely owing to the prominence of maritime heritage. Of the rest of the awards, the majority has been towards Areas, with the remaining three types of heritage making up a small proportion.
- **Neath Port Talbot** has a large majority of awards going towards Landscapes at 68 per cent, a figure far higher than the average across the Heritage Fund. Of the remaining awards, 20 per cent were for Areas, with the remaining types of heritage making up a small proportion. Museums, constituted only 2 per cent, far lower than the average.

- **North East Lincolnshire** has a large majority of awards going towards Areas, with 65 per cent; a figure far higher than the average across the Heritage Fund. 14 per cent of the remaining awards are towards Community, a figure also much higher than the average.
- **Stoke-on-Trent** maps closely to the Heritage Fund, with the largest proportion of awards going to Areas, followed by Landscapes and Museums.
- **Torbay** had just over 50 per cent of awards going to Areas, with a fairly even split between Museums, Landscapes, Industrial and Other. Interestingly Other makes up 12 per cent of awards, a figure much higher than the average for the fund.

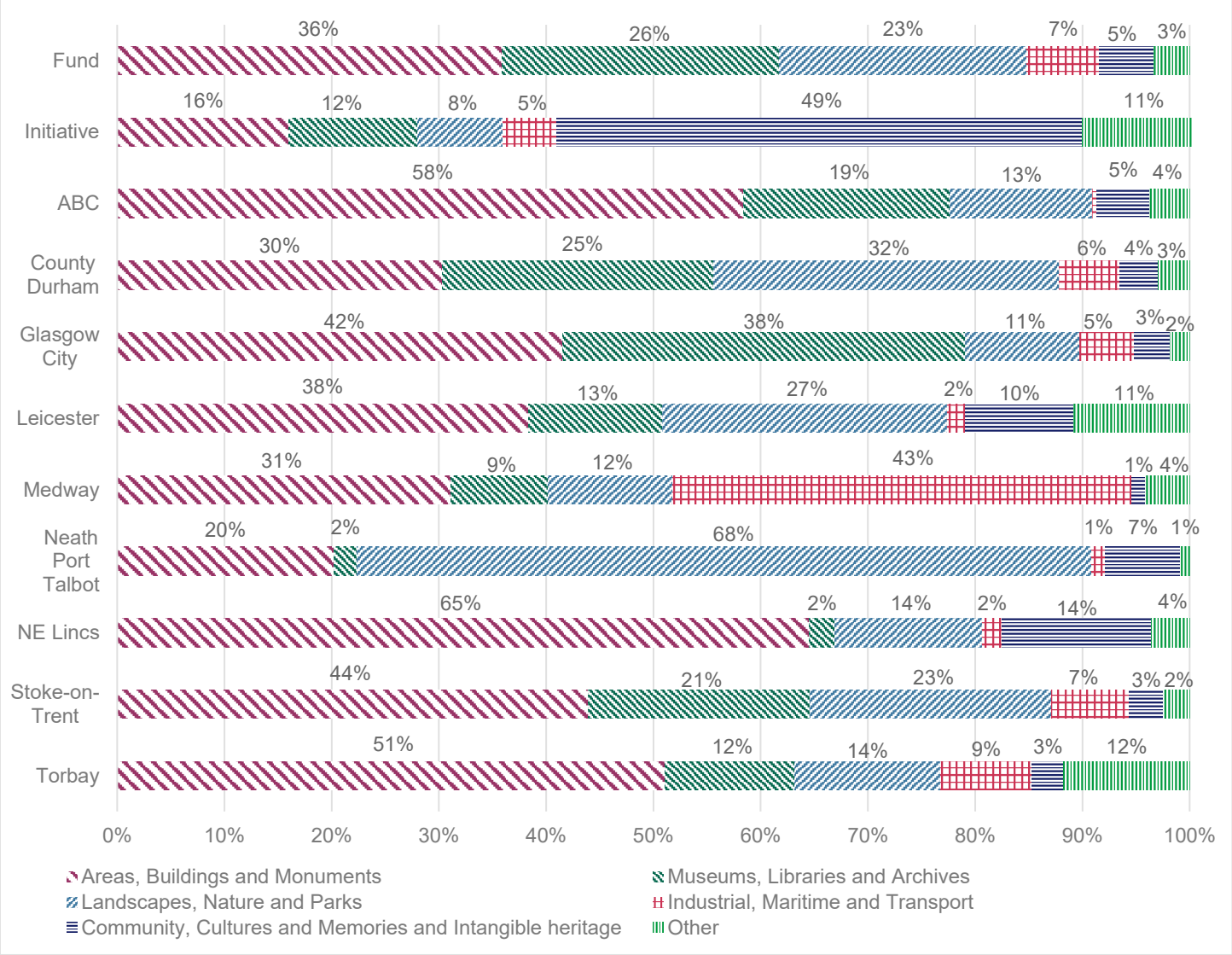
Benchmarking the distribution of heritage investment across the classifications helps to situate the local visions emerging in the Places in the context of prior investment, project delivery experience and relevant capacity. In Places where local visions and emerging priorities represent a greater departure from these historic benchmarks, this underlines the challenges reported by lead organisations and area teams in advancing their ambitions.

For example, both Torbay and North East Lincolnshire expect natural heritage to emerge as a greater priority in their Heritage Places owing to both the need to protect this heritage, and its placemaking potential locally. In both Places, 'Landscapes' represents 14 per cent of total investment since 1995/6, compared to 23 per cent nationally, which underscores both the challenges and opportunities reported in these Places in delivering their visions.

Both Glasgow and Armagh City, Banbridge and Craigavon Council Area lead organisation consultees report a strong track record of heritage-led regeneration in their areas which is reflected in higher-than-average investment in 'Areas' compared to the Heritage Fund benchmark. For Heritage Places, both Places view the Initiative as an opportunity to bridge tangible with intangible heritage to maximise the impact of heritage-led regeneration at settlement and district level.

Indeed, all the Places prioritise community engagement as a way to explore community and cultural heritage in the Places. However prior investment in 'Community' is lower-than-average compared to the national benchmarks in two thirds of the Places. North East Lincolnshire, Leicester and Neath Port Talbot are the only Places with higher-than-average investment in this heritage classification.

Figure 1.8 The breadth of funded heritage within each Heritage Place compared to the Heritage Fund as a whole



1.5.2.3 Place need, potential and opportunity

In this section, we revisit the Place Index scores for the nine Tranche One Heritage Places to explore the relative start positions of the Places in relation to local need and potential. Combining this analysis with qualitative evidence from our research interviews, highlights those contextual factors which appear most influential at this early stage of the Initiative. In addition to this, we also present population measures of pride in place across the eight Places where data is available to explore the potential of the Places in relation to the Initiative's overarching aim to boost pride in place.

1.5.2.3.1 The Place Index

As outlined in Section 1.2.1.2, using the Place Index data to compare Places across different nations is not advised. As such, the following presentation of the Place Index data shows the weighted Place Index score for each Place and a Place ranking of their weighted total within their respective nations, alongside a breakdown of indexed scores for each factor within the Place Index. In order to further aid comparability between the Places, the national ranks for the factors are also presented and discussed in the following section. This is outlined in Table 1.5 below.

In order to fully understand the Index, it is important to understand each of the composite indicators. 'Heritage Condition' is constituted from a basket of indicators which sought to cover the full breadth of heritage including historic built environment, museums archives and artefacts, industrial, maritime and transport, cultures and memories, landscapes and nature, and parks and open space. Within this, indicators such as the percentage of heritage assets at risk, and the number of blue plaques per 100k of population were used. 'Deprivation' looked at measures for deprivation within each nation, calculating the

percentage of sub-areas within the local authority boundary that were in the 20% most deprived. 'Previous Heritage Fund Investment' looked at the amount of Heritage Fund investment in each area which had been awarded in the 10-years prior to June 2022, with less prior funding receiving a higher score. Lastly, 'Other Funding' looked at the amount of investment in the area via other place-based funding schemes, such as Levelling Up Funds, with high levels of funding represented by a high score.

Table 1.5: Breakdown of final Place Index scores (weighted total), rank within national context, and indexes of each factor making up the Place Index.

Area	Place Name	National Rank (within country)	Weighted total	Heritage Condition Indexed	Deprivation Indexed	Previous Heritage Fund Investment Indexed	Other Funding Indexed
England	Stoke-on-Trent	2	64.1	42.3	81.5	17.9	91.1
England	County Durham	16	46.2	25.7	52.7	37.6	98.8
England	Leicester	20	44.0	26.4	56	11.5	70
England	North East Lincolnshire	26	42.3	20.3	59.6	13.5	80.3
England	Medway	29	41.0	26.9	35.9	18.9	73
England	Torbay	42	37.5	29.8	42.6	7.7	39.4
Northern Ireland	Armagh City, Banbridge and Craigavon Council Area	3	59.7	66.5	32.7	20.7	31.9
Scotland	Glasgow City	1	93.6	76.4	100	24.9	100
Wales	Neath Port Talbot	3	67.6	63	72.7	8.9	66.9

Revisiting the Place Index again at this juncture with the additional primary evidence collected for the evaluation helps to illuminate how these contextual factors and their relative strength in each of the Places influences progress and delivery.

Across all selected Places in England, Stoke-on-Trent ranks highest in the final analysis of all the Places. This is indicative of the high levels of heritage need and deprivation and low levels of prior funding. Both area team and lead organisations consultees working in Stoke-on-Trent, report greater challenges reaching consensus on priorities and plans amid such high heritage need, as well as added practical challenges of lower organisational familiarity with the Heritage Fund and its grantmaking systems.

Glasgow City ranks number one in Scotland in the Place Index, reflecting very high levels of heritage need and deprivation. However, it has a high indexed score for prior Heritage Fund investment. This reflects how local partners relate their start position for the SSCHD Heritage Places scheme, as one of great need but where local partners take confidence in their delivery capacity and capability from the strength of their relationship with the Heritage Fund and extensive prior experience managing and delivering Heritage Fund restoration and regeneration projects.

1.5.2.3.2 Pride in place and place attachment

In addition to the Heritage Fund data sources presented thus far in Section 1.5.2, ERS reviewed the quality and availability of measures for additional, contextual variables known to influence the outcomes associated with thriving places and communities. This included local determinants found to have a high association with thriving communities in the What Works Centre for Wellbeing's Understanding Thriving Communities evidence review. However, after review of these data sources, similar limitations were found to those encountered during development of the Place Index, principally varying data accessibility and comparability across the four nations.

Indicators of pride in place were among those reviewed to develop the Place Index methodology, but ultimately disregarded due to lack of consistency in measurement across the four nations. Since then, new pride in place measures have been adopted in England which enable improved comparison between the English Places. The remaining differences in measures across the four nations are also perhaps less

problematic when situated within the wider literature concerning pride in place and its measurement[3], which validates the use of multiple measures to reflect locally distinctive definitions of pride.

After our review, this left three shortlisted indicators, which provide direct or proxy measures of pride in place and place attachment. These indicators are listed below, and draw on data at the closest available geography to the Heritage Place's area of operation. For example, Glasgow City and County Durham level data is used, despite these Heritage Places being focused on particular settlements and neighbourhoods. At this early stage, it's not possible to forecast whether investment at these lower spatial levels will only impact residents in these settlements or districts, or whether there will be a wider impact on residents across the local authority area. Both of these Places plan to gather baseline data from the target population as part of early project activities, and will therefore be advised to include these measures in their research tools to collect evidence on impact:

- Satisfaction/rating of local area as a place to live[456]
- Sense of belonging to neighbourhood/local area[345]
- Pride to live in local area[3]

The sources of the data were different for each UK nation, and no comparable data could be sourced from Northern Ireland for all three measures, leaving a gap for Armagh City, Banbridge and Craigavon Council Area Heritage Place. Further to that, questions posed in data capture, by the respective collectors, differed slightly for indicators relating to satisfaction and belonging, with individuals in England and Wales answering the same question for satisfaction of local area as a place to live, and individuals in England and Scotland answering the same question for sense of belonging to neighbourhood. Pride in Place was only measured in England, leaving further gaps for Glasgow City and Neath Port Talbot.

Responses to the survey questions were grouped into positive/negative responses; for example, those that responded they were very or fairly satisfied are grouped into an overall percentage of individuals who are satisfied. The results of the analysis can be seen below in Figure 1.5.

All three indicators demonstrate, on average, a higher positive response to satisfaction with local area, compared to sense of belonging ratings which were generally lower, and pride in local area ratings which were lower still. Across all indicators, Glasgow City and Neath Port Talbot ranked comfortably first and second, showing high satisfaction and belonging to local areas compared to the English Places. Medway, on the other hand, ranked the lowest across all indicators, with Stoke-on-Trent performing marginally better. In both places, less than 50 per cent of residents responded they were proud of their local area. Leicester, North East Lincolnshire, County Durham and Torbay had very similar scores for each indicator.

Comparing the scores for each Place with their respective national averages, there is only one instance where an English Place scores above average, with County Durham scoring four per cent above the average for 'belonging'. In England, the national averages are 74 per cent for 'satisfaction', 61 per cent for 'belonging' and 59 per cent for 'pride'. Both Medway and Stoke-on-Trent are much lower than the national average for both 'satisfaction' with, and 'pride' in, local area.

For Wales, the national averages were 89 per cent for 'satisfaction' and 79 per cent for 'belonging'. Neath Port Talbot maps closely to the average for 'belonging' in Wales, at only one per cent below, however the average for 'satisfaction' is 9 per cent lower. Scotland has a national average of 95 per cent for 'satisfaction' and 82 per cent for 'belonging'. Glasgow City falls marginally below the average for 'satisfaction' at 92 per cent however the city is more markedly below average for 'belonging', standing at 75 per cent.

Collectively, this indicates good targeting of the Initiative at those Places where there is opportunity to increase pride in place and place attachment. Over time, this dataset will be revisited and updated, to

[3] The Bennett Institute for Public Policy, Townscapes: Pride in Place, and the Southampton Institute for Arts and Humanities Feeling Towns project (part of the AHRC's Place Programme)

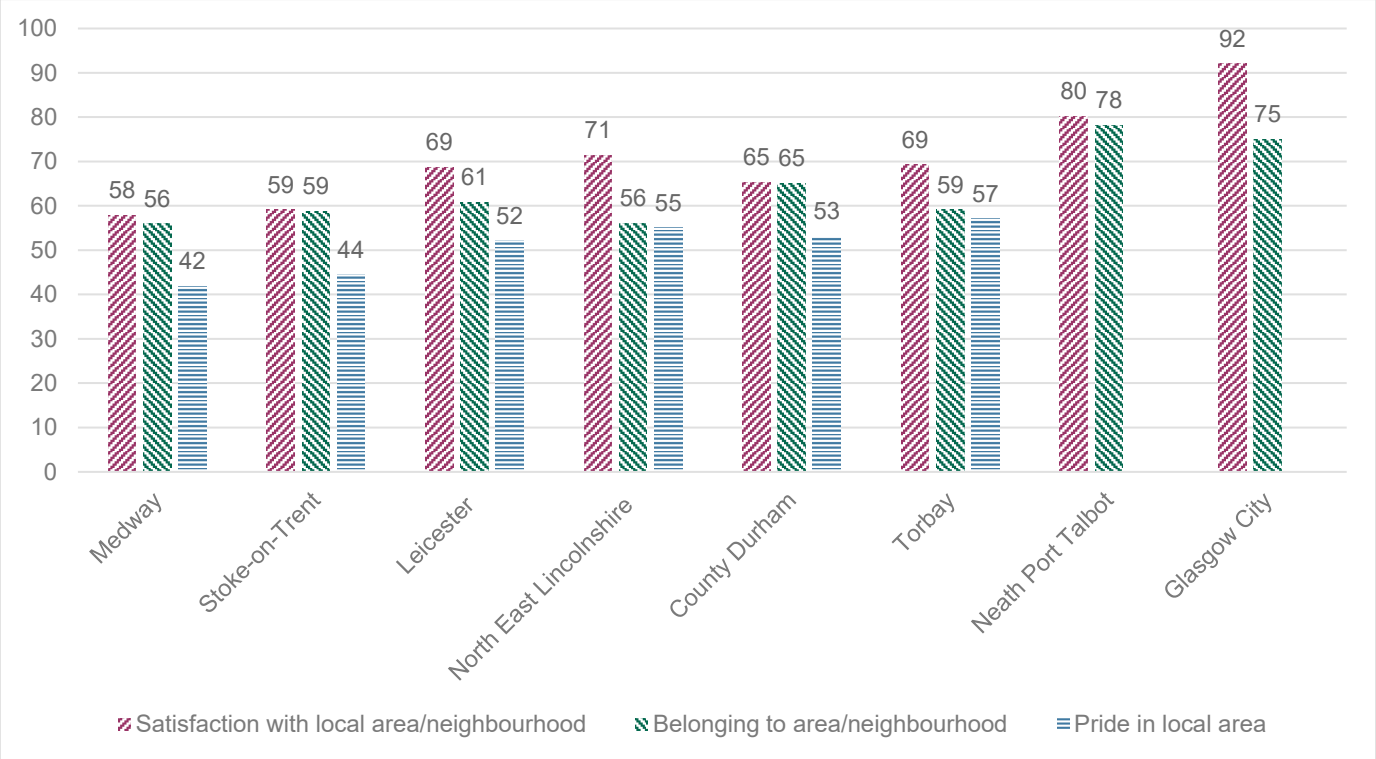
[4] UK Government Community Life Survey (England only) - https://www.gov.uk/government/statistics/community-life-survey-202324-annual-publication

[5] National Survey for Wales: results viewer - https://www.gov.wales/national-survey-wales-results-viewer

[6] Scottish Household Survey - https://www.gov.scot/collections/scottish-household-survey/

track impact on pride in place at the population level across the Places and to understand how Places 'starting positions' in relation to pride influence delivery and impact.

Figure 1.9 Satisfaction/rating of local area as a place to live; Sense of belonging to neighbourhood/local area; and Pride to live in local area, for each of the Heritage Places local authorities.



1.5.3 Summary: Key Contextual Factors in Year One

1.5.3.1 Reflections on context from the Heritage Places

1.5.3.1.1 External context

- Creating a **heritage strategy** is the backbone of development phase activities in three of the Heritage Places, and a fourth is developing a new, combined heritage and culture strategy. In the others, which include Places where there is no heritage strategy, pre-existing cultural, creativity and regeneration strategies are regarded as appropriate frameworks within which to develop plans for their Heritage Places visions.
- The pre-existing strength of the **local policy context** for Heritage Places therefore varies from Place to Place. This depends on local ambitions for Heritage Places, and cannot necessarily be inferred by the mere presence or absence of specific strategies and frameworks. Dialogue with prospective places for Tranche Two is recommended to discuss local ambitions, policy fit and ascertain whether development phase activities need encompass the development of a heritage strategy.
- The **national context** in terms of economic climate, local government finances, and the change in government are regarded as contributing to uncertainty and caution in the Places to press forward with larger capital projects.
- The strength of the **heritage sector**, its infrastructure and relationships between the sector and the local authority are key determinants of the approaches being taken during the development phase. Specifically, the extent to which smaller, grassroots organisations are capable, and have mechanisms in place, to engage with Heritage Places.
- Where there are mechanisms already in place which penetrate into the grassroots level, Places are able to mobilise an inclusive, collaborative approach more rapidly. However, all Places identified continued demand for capacity building activities to meet their ambitions for Heritage Places.
- **Polycentric and rural areas** face added challenges and complexity in reaching consensus across all stakeholders on their Heritage Places priorities and plans.
- The synergies between heritage and **cultural initiatives and programmes** provides framing and direction for plans and approaches in a number of the Places.

- One lead organisation highlighted challenges in aligning SPF investment with Heritage Places due to asymmetry in the funding timeframes. A closer examination of the alignment between other **devolved funding programmes** and Initiative grantmaking may therefore be warranted.
- The scale of **built heritage need** locally is a factor in determining how quickly specific schemes are expected to come forward, as well as expertise and capacity within the local authority to explore **diverse community and cultural heritage** where this is emerging as a priority for Heritage Places.
- The **socio-economic, age and ethnic composition** of local areas is also influential in determining both heritage priorities and the approaches, mechanisms and partnerships to engage different groups in the community.
- More intensive community and stakeholder engagement is being undertaken in Places where lead organisations report **reputational challenges of the local authority** among local communities and stakeholders.

1.5.3.1.2 Internal context of local partners

- **Capacity in the lead organisations** is a barrier to delivering at scale. This is not expected to abate in the future, and is particularly challenging in Places where the geographical scope of the Initiative remains broad, across the whole local authority area.
- In most Places, lead organisations are therefore keen to build capacity throughout the wider sector so that they can facilitate, as opposed to lead the Initiative, over the longer term.
- Lead organisations were broadly positive about the level of **political commitment to heritage** in their local areas, although area team consultees have observed differences across the Places. They suggest the scale of investment in heritage by the local authority can provide a useful proxy for the strength of political leadership.
- The extent to which Places have experience of **partnership and place-based delivery** for heritage has contributed to how quickly Places can resolve the roles and responsibilities of partners in the Initiative.
- Within the lead organisations, **close working and alignment between the local authority's culture, heritage and regeneration teams** prior to Heritage Places is regarded as a key factor in the progress being made, and the place-based approaches being taken.

1.5.3.2 Place features and characteristics

1.5.3.2.1 Grantmaking

- The use of **quantitative measures of local context** is an evolving area of interest and learning from the evaluation.
- The **Heritage Fund's historical grantmaking data** at the local authority level is used in the evaluation to create and test **proxy measures for local context** in terms of the 'starting positions' or 'readiness' of Places to deliver the aims of the Initiative.
- **Average grant size, scale of prior partnership delivery and place-based delivery** may all be indicative of a Place's capacity for place-based, collaborative delivery at scale via the Initiative.
- Benchmarking grantmaking in the Places against the Heritage Fund portfolio as a whole, provides a means to compare the relative start positions of the Places, track change over time, and identify whether these measures of local capacity can help to predict longer-term success.
- In terms of **average grant size**, only three of the average grant sizes for the Tranche One Places were above the Heritage Fund portfolio average. Glasgow City and Medway are far above average at the outset of the Initiative, while Leicester and Armagh City, Banbridge and Craigavon Council Area are far below.
- Two thirds of the Places have a track record of **partnership delivery** which outperforms the Heritage Fund portfolio average. Torbay, Stoke-on-Trent, Glasgow City and Leicester have much higher rates of partnership delivery than the average, while County Durham and Armagh City, Banbridge and Craigavon Council Area have much lower rates.
- Only Torbay has a, slightly, lower rate of **place-based delivery** compared to the Heritage Fund portfolio average, with six of the nine Places far outperforming this. Glasgow City and County Durham have a particularly high rate of place-based delivery historically.
- Analysis of grantmaking by **heritage type** provides an indication of Place capacity to deliver initiatives across the breadth of heritage. Most of the Places intend to develop initiatives spanning both intangible and tangible heritage. However, in two thirds of the Places, prior investment in

projects classified as 'Community, Cultures and Memories' is lower than the Heritage Fund portfolio average.

- This reinforces reports from some of the lead organisations regarding their capacity and expertise to engage diverse communities and involve grassroots heritage and community organisations.
- Torbay and North East Lincolnshire expect to focus on natural heritage however 'Landscapes, Nature and Parks' represents 14 per cent of total investment historically, compared to 23 per cent nationally, which underscores both the challenges and opportunities reported in these Places in delivering for natural heritage.
- It is still very early in the delivery of the Initiative and only nine of the (up to) 20 Places have been onboarded. However, qualitative and quantitative measures of local context for Tranche One together infer some features of the local context that appear to most influence delivery approaches during year one. Namely, the scale of prior experience in relation to:
    - Project delivery for intangible, community and cultural heritage, and collaborative approaches to working with a range of local communities and community organisations to explore their heritage.
    - Place-based project delivery, and delivery of heritage placemaking schemes via the programmes of other cultural, heritage and place funders.
    - Partnership project delivery, and the strength and breadth of working relationships within the local authority, and with the grassroots heritage community.
- Where prior experience and relationships are less well established and broad ranging, Places are typically investing more time and resource in addressing these gaps in order to prepare for inclusive, collaborative, place-based delivery via the Initiative.

1.5.3.2.2 Place need, potential and opportunity

- **The Place Index** was created by the Heritage Fund to measure need and potential in local authority areas, in relation to the aims of the Initiative.
- Revisiting the Place Index together with the additional qualitative evidence collected for the evaluation, helps to illuminate how these contextual factors and their relative strength in each of the Places influences early progress and delivery in year one.
- Of the four factors in the Index, **'Heritage Condition' and 'Previous Heritage Fund Investment' emerge as most influential** at this early stage.
- Heritage need, as indicated by **'Heritage Condition'**, was cited often by Places in terms of the challenges in reaching consensus on priorities. This appears to present greater challenges in Places which are polycentric, and in Places which have not focused down at a smaller geographical scale.
- **'Previous Heritage Fund Investment'**, whilst used as an indicator of need in the Index, also may serve another useful purpose, in indicating the strength of relationships locally with the Heritage Fund and familiarity with its grantmaking. Where Places have lower prior funding, area teams and lead organisations also report additional challenges in navigating roles and responsibilities at the Heritage Fund and establishing, or developing, the relationship between funder and lead organisation.
- A strong prior relationship with Heritage Fund officers, has also been beneficial in some Places in terms of the Heritage Fund's familiarity with local heritage, and greater attunement to organisational approaches and priorities for heritage-led placemaking.
- Analysis of measures of **pride in place** across the eight Places where data is available at the local authority area level indicates good targeting of the Initiative at those Places where there is opportunity to increase pride in place and place attachment.
- Over time, this dataset will be revisited and updated, to track impact on pride in place at the population level across the Places and to explore how Places 'starting positions' in relation to pride influence delivery and impact.

1.6 Key Design Features in Year One

In this chapter, we share the findings from interviews with lead organisations and area teams on how features and principles of the Initiative's design have influenced delivery approaches in year one.

1.6.1 Flexibility

In terms of the influence of the Initiative's design on implementation, testimony from area teams focused mainly on the degree of flexibility. At the outset of the Initiative, the objectives were not yet defined, although the overall intention to invest long-term in the ambitions and solutions of local areas was welcomed and clearly understood by both the area teams and lead organisations. In spite of this flexibility, and in most of the Heritage Places, the general approach taken in year one looks broadly similar. As a first step, area teams have encouraged Places to bid for a development phase project to understand needs, opportunities, and to explore solutions with stakeholders and communities in order to produce a vision for their Heritage Place. The next phase is then expected to involve applications for specific projects or larger programmes that involve a suite of projects. Consultees were not sure if this was the 'right' approach in terms of the overall Initiative design, but felt it was right for their Places.

1.6.2 Staged approach

The extent to which initial exploratory work occurs alongside scoping of specific heritage projects varies from place to place, with some places undertaking strategic development phase activities alongside exploring opportunities for specific assets. In a smaller number of places, where the evidence base is already viewed as sufficient, and there are recent culture and/or heritage strategies to guide prioritisation, this scoping work has been less of a focus of early applications from the lead organisations. This includes the former Areas of Focus.

Figure 1.10 The Leopard pub (Stoke-on-Trent Heritage Place)

The sequencing and staging of the Initiative are key questions for the Heritage Fund to reflect upon internally. Policy consultees indicated that the more mechanistic, staged approach emerging in many Tranche One Places, whereby specific project proposals are predicated on the priorities that emerge from the scoping work, is not intentional in the Initiative design but rather an outworking of the internal resourcing and structure of the Initiative at the Heritage Fund. Whilst area teams are kept updated on the Initiative by policy and insight colleagues via the Knowledge Hub, it was suggested that more strategic direction and one-to-one support may be needed, to support area colleagues to build their confidence to approach the Initiative flexibly across these early stages, and to enact a wider variety of place-based approaches in the Places.

1.6.3 10-year timeframe

Area team consultees understand that the Heritage Places will have up to 2033 to access funding from the Initiative and have pitched their communications and guidance appropriately. They have encouraged the Places to think about the investment as a 10-year commitment and that beyond that, a strong legacy of increased capacity and notable achievements in the Places will position them well to access further open programme funding. Area team consultees and lead organisation consultees were united in this understanding, and all the Places have welcomed the opportunity to generate impact over the full 10 years. Area team consultees agreed that the 10-year timeframe may be a contributory factor to the 'slow burn' of progress in the Places currently. However, they also felt that this preparatory work cannot be shortcut if a place-based approach is taken, and that it is unlikely progress would be any quicker under a shorter initiative - although the impact may be less if the initial exploratory work was rushed and compromised.

However, policy colleagues indicated that the timeframe may be misleading, and that some Places may achieve their ambitions sooner, or later, than that, emphasising that, 'it takes as long as it takes'. To a degree this may reflect the semantics of using the Initiative interchangeably with place working i.e. that place-based working and schemes are expected to continue in the Places beyond 2033 and that current and future funding mechanisms at the Heritage Fund can be deployed accordingly. Either way, it will be important to reach agreement on this internally and how this is communicated to the Places.

Lead organisation consultees report that the 10-year timeframe is influencing their approach by allowing them 'do things properly' now, in order to make a lasting difference. They are mindful that the steps they take now are not only about what's right in the short-term, but in ten years' time as well. The endgame being that there are projects and schemes that generate placemaking impact and benefit all communities in the Places.

They describe a measured but ambitious pace at this stage, balancing realistic goals with meaningful progress. This is in stark contrast to other funding programmes with shorter timescales, which were regarded as placing pressure often on applicants to over-promise and underplay the challenges and risks. Shorter funds also immediately take some projects off the table, closing down the possibilities. They also limit the opportunities for collaboration, with partnership working often limited to the 'usual suspects'. The 10-year timeframe and collaborative approach by the Heritage Fund has opened up realistic conversations about capacity and achievable goals, and provided an opportunity to ask for investment in areas that would not normally be attractive to a funder. Generally, it was viewed positively for allowing a more honest, 'warts and all' approach that balances capacity, resilience, and realism with ambition.

"We're actually giving ourselves some thinking time, and that means instead of a knee jerk reaction of going, what we need is a new building or what we need is this, we're actually going to have time to work out what is going to make a lasting difference and what could have legacy." – Lead organisation consultee

One consultee observed that this outlook was also filtering through to the heritage community, with organisations starting to demonstrate a more collaborative, long-term perspective.

"It was changing that mindset, and you could see that happening in the conversations that we were having. You know, it wasn't just about having a celebratory party or something like that. It was real change, impactful change that that, you know, will take time. But it will be worth it." – Lead organisation consultee

"And I think that's the point at which people stopped just throwing at us their capital projects going, we want this … or we want this … because it was like, oh, okay, well, what might we need to know now to achieve that in 10-years' time?" – Lead organisation consultee

Specifically, consultees highlighted the benefits of a more in-depth scoping phase in helping to overcome some of the reasons that previous efforts did not gain traction or lead to concrete projects. In Stoke-on-Trent, they describe the timeframe as a catalyst to prioritise strategic development, recognise the scale of the heritage need, and reach consensus between stakeholders that action is needed now. As a result, Heritage Places has prompted the establishment of a dedicated working group which brings all heritage-related initiatives under one umbrella, including an enforcement programme to ensure private developers

maintain and protect heritage sites, a Heritage Prospectus to guide funding efforts, as well as specific schemes and projects. This has unified heritage efforts in a way that, they assert, wouldn't have been possible with a shorter timeframe.

1.6.4 The Investment Principles

Consultation with Heritage Fund staff revealed some differences in emphasis and expectation in terms of the Initiative's relationship to the Investment Principles. The Initiative is expected to make a significant contribution to the Saving Heritage Investment Principle and the Place Index was weighted to prioritise Places where the level of risk to heritage is significant. Policy consultees indicated that this was intentional to signal a departure from the previous Areas of Focus Initiative where organisational sustainability and inclusion were the primary foci of investment. Whilst it is recognised that saving heritage at risk cannot be uncoupled from the infrastructure needed to undertake this work, there are concerns that current investment focuses more than was originally anticipated on infrastructure, when this ought to be sufficiently strong if the selection process has been effective. However, this was not as much of a concern among area team colleagues, and thus in the way in which they are approaching conversations and support in the Heritage Places.

1.6.5 Summary: Key Design Features in Year One

- The **flexibility** of the Initiative has enabled area teams and the lead organisations to explore local ambitions and solutions that they regard as right for their Places.
- This has unfolded in an approach that looks broadly similar across the Tranche One Places, involving a development phase project to scope priorities and plans and produce a vision for their Heritage Place.
- In some Places, area teams and lead organisations indicated that more substantive proposals for local heritage are not anticipated to emerge until development phase scoping and strategy work is complete i.e. a **staged approach.**
- The Heritage Fund is recommended to reflect on the extent to which this more mechanistic, staged approach is intentional and desirable. Policy consultees indicated this may, instead, reflect a lack of central, policy resource for the Initiative, to guide implementation locally and encourage more fluidity in the approach.
- The **10-year timeframe** may be contributing to the 'slow burn' of progress in year one, however neither area team nor lead organisation consultees felt the preparatory work underway now could be shortcut and was allowing Places to 'do things properly', to maximise long term impact.
- There is a lack of clarity internally at the Heritage Fund regarding the 10-year timeframe, and whether Places may achieve their goals earlier or later than 2033. The Heritage Fund is recommended to reach consensus on this issue and communicate this to the Places.
- The longer timeframe was viewed positively by lead organisations, for allowing a more 'warts and all' approach that balances capacity, resilience, and realism with ambition. This is in contrast to their experiences of shorter funding programmes, which limit ambition, partnership working, and encourage applicants to over-promise and underplay risks.
- In one Place, the timeframe is helping to change mindsets in the heritage community, encouraging a more collaborative, long-term placemaking perspective.
- The Initiative is expected to make a significant contribution to the **Saving Heritage Investment Principle** and the Place Index was weighted to prioritise Places where the level of risk to heritage is significant.
- However, policy area consultees report concerns that year one activity focuses heavily on gaps in infrastructure and capacity. The Heritage Fund is recommended to reflect on the extent to which Saving Heritage ought to feature more substantively in development phase activity, and if so, how Places can be supported to balance the need to strengthen infrastructure alongside expectations to deliver early impacts for heritage.

1.7 Experience of the Year One Process

This chapter explores the process of becoming a Heritage Place and the subsequent steps and processes that Places have followed, with support from the Heritage Fund, to develop projects and begin delivering their activities. It shares the perspectives of area team and lead organisation consultees on these processes, as well as their reflections on communications and stakeholder engagement, before highlighting some of the tools, techniques and 'work arounds' employed to overcome challenges.

1.7.1 Designation as a Heritage Place

The early conversations between the area teams and the Places generally took place at officer and leadership levels of the local authorities, which was viewed as effective in gaining the necessary strategic and operational buy-in to the Initiative. In the Places where area teams had pre-existing relationships with the local authorities, area teams described this process as more streamlined since the Heritage Fund was already a trusted funder and partner within the local authority.

The area teams describe some difficulty in defining the Initiative to the Places at the outset, setting out the Heritage Fund's expectations and offer of investment. Some of the area teams encouraged the lead organisations to think of the Initiative as providing a focus for thematic or geographical investment, to ensure that the scale of delivery is proportionate to the investment in order to achieve meaningful impact. Broadly speaking, having looser aims for the Initiative at the beginning was viewed positively, providing the freedom for Places to explore and embrace new thinking and ideas.

The lead organisations report no reservations about accepting the designation as a Heritage Place, and headline messages about the Initiative were conveyed consistently across the Places by the area teams in terms of the long-term commitment to work in the Places and respond to local needs, opportunities, and priorities. The overall approach was described as collaborative and 'an open invitation to engage', in contrast to other place-based funding schemes, although it was less clear to some at the outset what the role of the lead organisation would entail, specifically, and how the funding process would join up at the place level.

"It was open enough that we could make sense of it. As long as it was about heritage, as long as it was about dealing with the issues that we identified, why now and why here, as long as we're doing that and the heritage was at the at the core of it, we could shape it to have the biggest impact. And I thought that was positive." – Lead organisation consultee

"I think we should have got that together a bit more [to clarify the place funding mechanism], that relationship. I don't know whether it's a memorandum of understanding or whatever it is between the two parties. So that we're clear about the expectations both sides really. I think it would have been a better thing to do earlier." – Lead organisation consultee

Some Places received an additional steer from area teams on the Heritage Fund's expectations. One lead was advised that the Heritage Place should revolve around capital projects but with engagement at the core, while another was advised that the local programme could revolve more around smaller revenue grants. Two places were encouraged at this initial stage to propose a smaller geographical focus for their Heritage Place. This was welcomed in these Places, where lead organisations felt the scale of need and/or size of the local authority area makes a broader scheme unviable. As noted earlier, area team consultees have interpreted the available guidance as best fits their local areas and did not necessarily see this as problematic.

In the Places where a smaller geographic focus was recommended, these Places reflected on which parts of their area had the greatest opportunity, need, and potential, as well as the likelihood of these Places benefiting from other funding programmes. Unlocking other opportunities in these Places, both internally within the local authority and externally, was also a factor. Such opportunities included 'tentpole' moments and celebrations, or the opportunity to influence broader local policymaking for place. This reflects more localised application of the Initiative's selection principles and factors, but at a lower spatial level

In the remaining Places, any expectation to focus down at this stage was not made as explicit, although most Places recognised that Heritage Places would need to zoom in eventually on a more manageable theme or geographic scale where impact can be achieved. In some of these Places, lead organisations

feel they would have benefited from more guidance or boundaries at this early stage and that it was difficult subsequently to package up the initial, wide-ranging discussions into a £250k funding application.

"The conversation was big and the mechanism to fund it is quite narrow, and that's still the case of looking into future years past that initial grant funding". – Lead organisation consultee

The decision to accept the designation as a Heritage Place was largely internal within the local authorities, involving senior officers and members, and described as being straightforward and uncontroversial, with no major risks identified. Lead organisations with a longer history of working with the Heritage Fund viewed this pre-existing relationship as an important factor in establishing senior political and officer buy-in, as the Heritage Fund was already a trusted funding partner.

In some cases, these internal conversations included a range of departments while in others it was limited to the sponsor department. In a smaller number of Places, the decision involved some 'soft positioning' and 1-2-1 discussions to 'take the temperature' of key local partners, and/or introductions between local stakeholders and the Heritage Fund. In one Place, area teams were invited to tour potential locations for the Heritage Place and indicated a preference thereafter. This augurs well for the more detailed local engagement for Tranche Two selections. In the Areas of Focus, accepting the designation was viewed as a natural, seamless progression from this work.

1.7.2 Developing early thinking and first applications

The area teams have since settled into their own ways of communicating the Initiative to the Places, which benefits from further clarity internally on the Initiative's objectives, and guiding them in their first steps as best suits the local areas. This was regarded as in keeping with the place-based principles of the Initiative, allowing Places to develop their own approaches and timeframes for progressing as a Heritage Place. Area teams felt the Investment Principles have aligned well with this more flexible approach, compared to the previous outcome-focused approach, allowing Places to develop their ideas and construct their first applications within a looser framework of impact.

In support of this, some areas have chosen to target engagement and investment resource in the Places, to support early stakeholder engagement and to provide a consistent, dedicated contact at the Heritage Fund. In these areas, these colleagues met regularly with the local authority to discuss the initial application, and both attended the start-up meeting. This was regarded as positive for encouraging early stakeholder engagement, and for the long-term success of the Places.

Lead organisation consultees report that internal conversations with the Heritage Fund to 'throw ideas around' alongside more structured, stakeholder sessions, sometimes with RoSS consultancy facilitation and Heritage Fund staff, were both helpful in moving thinking forwards towards a first funding application. However, the Places report some challenges with the application process. Internal capacity has been a constraint for all, particularly in relation to community engagement, and in some instances further RoSS support was provided to support the bid process. In others, lead organisations accessed short-term revenue funding from the Heritage Fund to open up capacity internally to undertake consultation and prepare the application.

In one of the Places, the lead organisation convened an editorial group of local community stakeholders to guide the development of the application. Although it was more time consuming to bring these stakeholders together from the outset, and led to a later submission from this organisation, this approach front-loaded some of the community engagement work that forms a key pillar of many of the other applications. This highlights that speed to develop an application may not be a good proxy for the pace of progress.

In Glasgow, the first application was turned around relatively quickly. A number of factors appear to have contributed to this: the narrower geographical focus; a joint leadership model between two established partners with strong partnership arrangements in place and a track record of joint delivery; Glasgow Life's independent status as a CIC and ability to mobilise bid writing resources rapidly via its dedicated funding team; and, the fact that Sauchiehall Street's heritage and the risks to it were already well grasped by the Heritage Fund, due to the strength of the partners' relationship with the Heritage Fund and regular dialogue.

The short-term nature of the development funding has also made it difficult for some lead organisations to plan strategically over the long-term. This is also expected to influence their ability to retain key posts as funding cycles draw to an end. The Heritage Fund have been responsive to these challenges, and, in one place, the lead organisation has been granted permission to separate staffing and project funding to allow for two-year staffing budgets - although even longer-term revenue funding would still be preferable. Generally, the Heritage Fund staff have been praised for their efforts to support the Places, and leads recognise that they are operating as best as they can under the constraints of the Initiative.

Recent bi-lateral discussions between the Places in one of the areas have been highly valued, and consultees recommend the Heritage Fund convene meetings earlier between all the Heritage Places, to support with project planning and initiation. This would also provide a platform to gather feedback on common challenges and solutions. This could also provide an opportunity to share more insight on the Heritage Fund processes, including grant processes and national evaluation plans. The peer to peer network which will be delivered as part of the evaluation could provide one such forum for exchanging practice-based learning. This could be complemented by a separate mechanism, delivered by the Heritage Fund, for sharing information about grantmaking processes. This would be particularly beneficial for Place partners who have less prior experience of the Heritage Fund and are less familiar with these processes.

Figure 1.11 The Mermaid Café in Cleethorpes (North East Lincolnshire Heritage Place)

1.7.3 Communications and stakeholder engagement

In terms of wider communication of the Initiative within the Places and their broader areas and regions, area team consultees report taking a cautious approach, to avoid inadvertently creating the impression that the Heritage Fund is no longer interested in funding projects in other local areas. Instead, area teams have focused on ‘micro level’ stakeholder communications to raise awareness of the Initiative and what it can potentially do for the Place. Discussions with other place funders and strategic stakeholders, to work out where there might be joint opportunities, are also starting to take place.

However, area teams felt that Heritage Fund communications were not entirely in step with the approaches and activities emerging in the Places. On the one hand, basic information about the Initiative objectives is still not published on the website. On the other, there is an expectation that there will be more stories to tell from the Places. This underlines the need for the organisation as a whole to reach a common understanding of the journey in the Heritage Places and bring all areas of the business into line with one another.

Expectation management is also a key concern for the Places, recognising that they cannot do everything communities and stakeholders may want with the funding available. Places hope to ensure this is made clear at the outset and that the Initiative is positioned as a collaborative, place response to local issues - in contrast to more conventional funding programmes which pitch projects and organisations into competition with one another. This leads into a further point, about early messaging and communication

of the Initiative by the Heritage Fund, and how broad the scope of this should be while Places are still working through this exploratory phase.

Stakeholder respondents were somewhat unclear on what the Initiative is "doing", beyond what the publicly available information showcases. Therefore, some stakeholders remained unclear on the programme aims and outcomes, how aims will be achieved and what delivery may look like, and/or what is currently going on in the Places or is planned. One stakeholder reported that their organisation had received variable responses from Fund colleagues across the country, and that in some cases, a lack of communication had led to a lack of clarity. The Heritage Fund was encouraged to proactively share information, as the Initiative unfolds, about what's happening in each of the Heritage Places, as well as collectively.

1.7.4 Tools, techniques and 'work arounds' to overcome challenges

Area teams have employed a number of tools and techniques to support Places through these early stages, including the provision of RoSS consultants to support with bids and monitoring, extension of single stage grants up to £350k to address capacity needs in the leads, providing funding exclusively for staff posts, and flexibility with process requirements to expedite permission to start. The single stage grant mechanism, while working well to get money into the Places as quickly as possible, requires leads to submit multiple applications within a short timeframe however to sustain key posts; which is a further demand on capacity. Generally, area teams observe some inconsistency in the level of flexibility and support being offered to the Places which needs redress.

1.7.5 Summary: Experience of the Year One Process

1.7.5.1 Designation as a Heritage Place

- The Heritage Places opportunity was explored at officer and leadership levels within the lead organisations, to gain operational and strategic buy-in. This process was more streamlined where the Heritage Fund was already a trusted funding partner of the leads.
- The decision to accept the designation was taken by the lead organisations, although the two Places at settlement/district level undertook some light touch consultation with key, local partners.
- Area teams encountered difficulties communicating the Initiative at the outset, although consultees felt looser aims and criteria were helpful in encouraging local ownership and responses.
- Lead organisations had no reservations about accepting the invitation to become a Heritage Place although it was not clear to all Places at the outset how the funding mechanism would work and what the role of lead would entail.
- More detailed advice from the Heritage Fund at this early stage varied across the Places, with some Places encouraged to focus down on a smaller geographic area from the outset. The Heritage Fund is recommended to share learning across the organisation from this early step in the process, and consider whether the range of advice given to Tranche Two Places would benefit from more consistency and standardisation.
- In the Places where a smaller geographic focus was recommended, these Places reflected on which parts of their area had the greatest opportunity, need, and potential – aligning to the principles in the Place Index.
- More guidance and boundaries would have been welcomed in some of the Places, particularly where the whole local authority area remained in scope, to support a more focused development phase which can be delivered in the £250k funding envelope.

1.7.5.2 Developing early thinking and first applications

- Area teams continued to encourage Places to develop their own approaches, at their own pace, during the development of their first applications. The Investment Principles, compared to the previous outcomes framework, were felt to work well in facilitating this.
- Some areas have targeted engagement and investment resource in the Places, to support early stakeholder engagement and provide a consistent, dedicated contact.
- Support from the area teams and RoSS consultants was highly praised by lead organisations, in helping them to develop their applications.
- However, internal capacity constraints and the demands of the application process were challenges for some of the Places, particularly in relation to community engagement.

- In one of the Places, a community editorial group was formed to guide the bid. This front-loaded some of the community engagement work that forms a key pillar of many of development phase applications.
- Applications were turned around speedily in some of the Places. For example, in Neath Port Talbot, which was a former Area of Focus, and in Glasgow, which local leads attribute to several factors including the level of familiarity between the two partners, and with the Heritage Fund, the narrower geographic focus, and the dedicated bid writing function of the lead Community Interest Company applicant (Glasgow Life).
- Longer term funding for the lead organisations would be welcomed in many of the Places to allow Places to plan strategically over the long-term and support continuity in staffing. Area teams have been responsive to this, granting permission in one Place for the lead to separate staffing from project funding, and extend the staffing budget over two years.
- The Places reflect that it would be useful to exchange ideas with each other early in the process, to support with project planning and initiation and for the Heritage Fund to source feedback on challenges and solutions from the Places and share advice and insights on grant process, the national evaluation and any other support mechanisms.

1.7.5.3 Communications and stakeholder engagement

- Area teams and the lead organisations recommend maintaining a lower profile for the Initiative in the Places in the early stages. ‘Micro communications’ focused on partners and stakeholders were helpful in building a collaborative approach while managing broader expectations, and allowing space for strategic work in the development phase to follow its natural course.
- The key audience for central Heritage Fund communications at this stage are strategic, national stakeholders who report low levels of awareness of Heritage Places and a lack of clarity as to how they can align with local delivery.
- Stories with broader appeal to the wider public are more limited, while strategic work remains the focus of early activity.

1.7.5.4 Tools, techniques and ‘work arounds’

- Provision of RoSS consultants, funding exclusively for staff posts, the extension of single stage grants, and flexibility with process requirements to expedite permission to start, have been among the solutions found to early process challenges by area teams. The Heritage Fund is recommended to offer these, and any other solutions, consistently across the Places.
- The single stage funding mechanism works well to get funding out relatively quickly in terms of the funding mechanisms available through the Heritage Fund, but is working to drain capacity in the leads, preparing multiple bids over a short time to sustain key posts.

1.8 Conclusions and Recommendations

1.8.1 Conclusions

The report's conclusions highlight the challenging delivery context for local partners but how this serves only to strengthen the rationale for the Initiative, and the importance of the Heritage Fund continuing to work with these partners to position heritage as a route to place-led transformation. They draw attention to the successes of the selection process, particularly the "human" input into decision-making, as well as where this process may have fallen short in terms of a more granular assessment of the infrastructure in local areas to address high levels of heritage need.

The flexible, long-term and targeted nature of the investment is highlighted as successfully overcoming some of the shortfalls of shorter-term, competitive funding calls, by facilitating more honest appraisals of the challenges in local areas to saving heritage, and identifying the root causes of these issues, and their solutions. The early phases and activities in the Places to engage communities, while valuable and necessary, ought not however preclude early advancement of capital projects which can demonstrate local support.

Learning from Tranche One is summarised including conclusions regarding progress, success in the Places and the causal influences on the local delivery approaches. There are some clear differences in how the Initiative and its early years are conceived in different parts of the organisation, and across the Heritage Places. Comparing the internal Initiative structures at the Heritage Fund with those of comparable initiatives elsewhere in the sector, consultees remarked that the progress of the Initiative and its early impact may be suffering from the lack of a central, strategic lead that can clarify the Initiative's purpose and form, apply learning from implementation, and align this with the practice of area teams and partners in the Places. The Heritage Fund should give further thought as to how to resolve these issues internally, in terms of what ought to be place-led, where the Heritage Fund needs to be more directive to support the aims of the Initiative, and how this can be best managed.

1.8.1.1 Strategic context and rationale

- The **national and local contexts** for the Initiative have changed considerably since its inception. The change in government and implications for devolved funding and placemaking, as well as the financial pressures on local authorities are all factors which impact the risk appetite of lead organisations in relation to the Initiative. Whilst these factors are beyond the control of the Heritage Fund, it is an evolving context that will continue to impact on delivery for the foreseeable future, and until the consequences of new national placemaking policy and funding reach their full conclusion. The Heritage Fund staff supporting the Places are already working creatively within their grantmaking procedures and policies to positively respond to capacity and resource issues facing the lead authorities, as they arise. They are also capturing and sharing learning throughout the organisation to improve the overall support to the Places and ensure consistency.

- The **rationale** for a place-based heritage-led approach remains strong however, despite the changing context for implementation. Efforts in the Places during this early phase to strengthen the strategic position of heritage may be even more timely in this period of uncertainty, preparing the sector to be able to respond quickly and decisively to an evolving governance and funding landscape in local areas and regions, as this becomes clearer.

- The grantmaking processes for the Initiative, and more widely at the Heritage Fund, may however constrain this opportunism and the extent to which Initiative investment can align with **wider place funding** mechanisms. Lead organisations report that despite the overall flexibility of the Initiative, the funding mechanisms (the open programme processes and requirements) can be somewhat burdensome, slow, inflexible and disproportionate to the scale of investment compared to other funding programmes. In one Place, the lead organisation reports a reluctance to draw down Heritage Places investment while they have SPF funding, which can be deployed more swiftly and easily. This is at odds with the ambitions of the Initiative to align with these devolved funding schemes. Longer revenue grants to lead organisations and/or bespoke grantmaking processes were some solutions offered to the issues encountered.

- The strategic ambition of the Heritage Fund to align Heritage Places with the **Architectural Heritage Fund's Heritage Development Trusts** investment programme is another important dimension of the context for the Initiative. With many of the Places relating challenges in terms of their own capacity to lead bids and schemes, and insufficient capacity currently in the wider heritage community, a strategic coupling of the two initiatives can be expected to work to the advantage of both programmes.

1.8.1.2 Design of the Initiative

- The combination of the Place Index and the local insight and intelligence included in the **Tranche One selection process** has resulted in the selection of Places that successfully balance the principles of need, opportunity, and potential. The 'human' input into this process was deemed crucial and consultees have welcomed the longer timescale for local evidence-gathering and deliberation in Tranche Two to reach even more informed decisions. The absence of any indicators for local pride in place was the only potential criticism raised by strategic stakeholders, suggesting that this should be a factor in decision making - if this is the overarching aim of the Initiative - in order to identify places with greatest need in this respect.

- The weighting towards heritage in need reflects the close relationship envisaged between the Initiative and the Heritage Fund's **Saving Heritage Investment Principle**. Improvements to the Tranche Two selection might therefore aim to surface, with greater nuance, the conditions in shortlisted areas that can best match the overarching ambition to tackle longstanding heritage issues at scale.

- However, for this Tranche Two information gathering to be most valuable, the Heritage Fund must be clear and consistent in the criteria against which they evaluate the evidence collected. **Potential and opportunity** were the factors explored in Tranche One, however, drawing upon learning from this evaluation and wider organisational learning at the Heritage Fund, a more granular assessment of this seems warranted.

- In particular, the **infrastructure for heritage placemaking** across the Initiative varies, in spite of being judged sufficient in Tranche One to match the ambitions and expectations for the Initiative. 'Grassroots' infrastructure and infrastructure for local authorities to engage these organisations, as well as local communities, emerges from this evaluation as one of the factors that may warrant more attention, especially if the expectation is for Places to make visible progress more quickly in Tranche Two.

- **Strategic and operational alignment** between departments within the lead organisations is also a key factor to explore as well as the strength of alignment between the local authority and any key stakeholders expected to contribute significantly to the Initiative from the outset; demonstrated by the depth, scale and longevity of partnership working between the local authority and these organisations.

- In terms of the **targeted commitment in selected Places**, this is regarded positively as helping to overcome the perceived failures of more open, competitive grantmaking to target greatest need, uncover the real barriers to long-term system change, and targeting the change mechanisms that can deliver more lasting, sustainable impact. Lead organisation consultees describe engagement with the Heritage Fund staff for this Initiative as open and collaborative, and facilitating a more unflinching appraisal of the Place in relation to heritage need and the capacity of the heritage community to respond at scale.

- The response from strategic stakeholders, Heritage Fund staff, and the lead organisations to the **10-year timeframe** has been whole heartedly and universally positive and is regarded as the greatest strength of the design. Strategic stakeholders described this as 'thought leadership' by the Heritage Fund, and are enthusiastic about this unprecedented opportunity to learn about the long-term impact of heritage-led regeneration. They encourage the Heritage Fund in its efforts to ensure impact is captured across the full 10 years.

- The benefits of focusing on **community and stakeholder engagement** in the initial exploratory phase were well grasped by consultees, although many Places have found it difficult to balance strategic and operational resource in order to progress these activities as quickly as they might have envisaged. However, whilst this foundational work is important, it should not necessarily preclude bringing forward early **capital proposals** which can demonstrate local support. The time it takes to design larger

schemes, secure investment, deliver the works and realise the benefits from their use could easily take up to 2033 and beyond. This underlines the need for the Heritage Fund to support and encourage Places to balance short, medium and long-term objectives concurrently from the outset.

- The **lead organisations** for Tranche One are all local authorities, with the exception of one Place where a CIC and the local authority have joint leadership. While this presents limited primary evidence from the Initiative on the benefits and challenges of different leadership models, there was interest and support from stakeholders and Heritage Fund staff to explore other models in Tranche Two. Alignment in Tranche Two with Places where there are emerging or established Heritage Development Trusts and Cultural Compacts are two such scenarios put forward. However, the example from Glasgow suggests hybrid or dual leadership could also help to play to the respective strengths of co-leads and enable a more dynamic approach in the early phase to the progression of short, medium and long term goals.

1.8.1.3 Learning from the Tranche One Heritage Places

- The **progress** being made in the Places is regarded by areas team and lead organisation consultees as proportionate to the time it takes to develop ideas at this scale, over this timeframe and in collaboration with local stakeholders. However, this perspective is not necessarily shared unequivocally at all levels within the Heritage Fund. This disparity in expectations is starting to be felt in some of the places and exert some unanticipated, but manageable, pressures on lead organisations.

- The **drivers in the business case and Initiative rationale** would not suggest that the Places are not performing or adopting approaches as expected. However, if it is deemed necessary or desirable to encourage a different or modified approach in any of the Places, the Heritage Fund would need to set out more clearly their expectations and the rationale for any changes. This would potentially include making explicit the standard of evidence required for an approach which is 'responsive to local needs', and tolerances for Initiative management in terms of timescales in particular, and what is expected at each of the initial stages. The alternative being to trust local areas to make their own judgements about these matters. However in this scenario, the Heritage Fund will need to accept that this may mean different rates of progress across the Places in their early stages, and potentially in the scale of impacts for heritage over the long-term, by the end of the Initiative in 2033.

- Only 15% of the two-year **funding allocation** for the Initiative has been awarded to date. With only two months remaining of the 2024/25 delivery year and one more round of Committee decisions, this is not forecast to improve dramatically between now and the end of the first two years of implementation on 31st March 2025. This suggests that the performance of the Places in terms of investment made, reflects a combination of implementation and intervention challenges i.e. that the investment has not been profiled realistically across the 10-year period, as well as Places encountering greater challenges in implementation than originally envisaged by the Heritage Fund.

- The Heritage Fund has not been prescriptive about what success looks like in these early stages of the Initiative and there are no agreed success measures internally. If the Heritage Fund ultimately deems this something that should be place-led, then the evaluation draws attention to how **success and success measures** are understood in the Places at this stage - invariably framed in terms of strategic impacts and strengthening the position of the various local partners for longer-term, sustainable delivery.

- However, progress and approaches in the Places vary, even where awards were approved at a similar time and the local objectives for this initial stage appeared to share much in common. Evidence from the evaluation suggests that this reflects a combination of factors:

- The nature of the **advice and guidance from the Heritage Fund** on the aims and approaches expected over the short and long term. This is a factor which the Heritage Fund can influence if there is a desire to be more directive in terms of expected progress and approaches in the Places at any interval during the Initiative timeframe. Specifically, if the more mechanistic, staged process to the Initiative emerging in many of the Places requires refinement, then this needs to be made explicit and alternative approaches, which are more fluid and agile, shared across the organisation.

- The relative **starting positions of the Places** are also influential, in terms of the external and internal context in relation to the Initiative aims and how well positioned the Places are to advance towards specific proposals and schemes:

  - **External context** influences include:

    - The local policy context and the extent to which this, and alignment between stakeholders, is regarded as sufficient to guide priorities and plans.
    - Local governance arrangements in polycentric and rural areas, which can also add to the complexity of reaching agreement on initial priorities and plans.
    - Limited prior engagement with the grassroots heritage community as well as infrastructure and capacity to engage these groups, can also be a factor although all Places, irrespective of the quality of these relationships, prioritise ongoing capacity building of the sector during this early stage.
    - The presence of wider cultural initiatives and infrastructure provides helpful framing for Heritage Places in some of the Places, and presents opportunities to leverage the combined resources and impact of culture and heritage to transform places.
    - The scale and need of both tangible and intangible heritage in local areas is also a critical factor, which aligns with the priorities for the Initiative but amplifies the scoping work entailed.
    - Trust between the local authority and local communities and stakeholders also requires more nurturing in some Places, involving more intensive 'bridge building' work to gain local buy-in.

  - **Internal context** influences include:

    - The capacity within the local authority to lead the multiple strands of activity in the Initiative's early stages, in particular in relation to community and stakeholder engagement. This challenge is shared by all the lead organisations, and has been the main focus for appointment of new staff and consultants.
    - The scale of prior investment by the local authority in heritage was proposed as a useful proxy for senior leadership commitment by area teams, although all Places considered the level of buy-in to heritage as relatively high, and quickly boosted in any event by the designation as a Heritage Place.
    - The extent to which local authority teams and departments are aligned to support heritage placemaking also varies across the Places, and emerges as a key variable in determining early responsiveness to the Initiative.
    - Similarly, a track record of joint delivery with key partners and familiarity between partners, such that there is alignment of values and ways of working, is also facilitative.

  - Quantitative data on local context, coupled with these insights from the Places, highlight **the 'starting points' in the Places that appear to most influence delivery approaches** during year one. Namely, the scale of prior experience in relation to:

    - Project delivery for intangible, community and cultural heritage, and collaborative approaches to working with a range of local communities and community organisations to explore their heritage.
    - Place-based project delivery, and delivery of heritage placemaking schemes via the programmes of other cultural, heritage and place funders.
    - Partnership project delivery, and the strength and breadth of working relationships within the local authority, and with the grassroots heritage community.

  - Where prior experience and relationships are less well established and broad ranging, Places are typically investing more time and resource in addressing these gaps in order to prepare for inclusive, collaborative, place-based delivery via the Initiative.

  - The **geographic scale** of the Heritage Places also appears influential, as consultees reflect on the benefits and drawbacks of different boundaries. In two of the Places, lead organisations opted to focus down on a smaller geographical area from the outset, and thus report fewer concerns about

managing the scale of the heritage need, as well as local stakeholder and community engagement.

- Leads in the former **Areas of Focus** view Heritage Places as a natural progression from this prior initiative and are focused more on the development of specific proposals for local heritage. However, they are grappling with their own challenges in terms of expectation management of local partners, capacity within the local authority to lead bids and projects, and awareness of how the Initiative funding is being drawn down by local partners in their areas. The Heritage Fund should not make any assumption that these Places are 'in hand' owing to their prior involvement in Areas of Focus. Instead, the Heritage Fund might consider what support and mechanisms are in place for joined-up grantmaking in Places where local partners are poised to deliver specific projects.

- **Heritage Fund support** to the Places by the area teams has been highly praised, although efforts should continue to routinely share and embed learning and good practice throughout the organisation, and with wider stakeholders. Having dedicated investment and engagement managers that focus on Heritage Places in the areas and countries is working well in some of the areas as a way to ensure consistency for local partners.

- There is a limit however to the tools and 'work arounds' that staff can deploy to overcome some of the challenges inherent in the **grantmaking processes**, and further consideration could be given to long term revenue funding in the Places and whether there is a requirement for a more bespoke funding mechanism that can provide stability and flexibility for the lead organisations to meet the demands of place working. The rationale for such long-term revenue funding is well evidenced from ACE's Meta Evaluation of Place-Based Programmes, which was among the evidence sources reviewed to inform the design of the Initiative.

- Early **communication of the Initiative** within the Places appears to work best at a lower profile than might have been originally envisaged by the Heritage Fund at the outset, to manage broader expectations in the local heritage community, focus on key players, and avoid disincentivising applications coming forward in non-Heritage Place areas within the regions and countries. Strategic stakeholders report low awareness of what is happening in the Places beyond the headline information available on the Heritage Fund website. In some instances, this is limiting opportunities for alignment between national programmes of place-based investment. Many of the Places would welcome opportunities from the outset to share thinking between the Heritage Places before initial funding applications are drawn up, and thereafter.

Figure 1.12 Traditional Scottish dancing on Sauchiehall Street (Sauchiehall Street Culture and Heritage District Heritage Place)

1.8.2 Recommendations

In this first report, our recommendations centre around how to reach greater clarity and consensus on the strategic aims and delivery approach of the Initiative, rather than making specific recommendations for the Places. Once consensus is reached, we recommend some broad approaches for embedding any changes in Tranche One and Tranche Two, and the key considerations and circumstances for such changes to be enacted.

There is much to commend however in the design and delivery of the Initiative in year one, and so our recommendations begin by drawing attention to the aspects which are working well and should be continued and further encouraged.

Continue and encourage:

- The **10-year timeframe** is opening up new possibilities in the Places, to tackle the 'root causes' of the challenges facing local heritage, and gather evidence on long-term impact. This long-term commitment should be maintained, and learning taken forward in future place initiatives.

- The **deliberative stages in the selection process** for Heritage Places are invaluable, and it is commendable that Tranche Two will allow more time for discussions locally to consider the nuances of local context that influence readiness to implement a place-based approach.

- Area teams have embraced the **flexibility and local determination** enshrined in the Initiative's design. Together with the long-term commitment in the Places, this gives confidence to lead organisations and provides a refreshing and welcome opportunity to engage in frank and honest discussions with the Heritage Fund, and local partners and stakeholders, about local needs and solutions.

- **Development phase priorities, activities and achievements** in year one reflect recommended practice in place-based working, and are going further than ever before to reach into the grassroots community and heritage sector, to ensure an inclusive, equitable and collaborative approach to Heritage Places. Evidence from previous place-based programmes highlights the added value of this foundational work, in terms of long-term impact and sustainability, and the Heritage Fund should be commended for investing in this important, early phase.

- Lead organisations have praised the **support from the Heritage Fund area teams** in year one. A range of support mechanisms have been deployed, and solutions have been found in response to the specific challenges reported by lead organisations in the Places. Area teams should maintain this commitment to the Initiative's early success, and take forward good practice from Tranche One into Tranche Two.

Review and consider:

- Heritage Places stakeholders within the Heritage Fund are recommended to use the findings from this evaluation, as well as wider organisational learning from Tranche One, to **take stock of progress and emerging approaches** in the Places. The objectives of such an exercise would be to revisit the drivers for the delivery approach and whether these are sufficiently demarcated to encourage local approaches that fit with the expectations and ambitions for the Initiative in its early stages. This would encompass **further scoping of the drivers for delivery**:

    - The **geographical scale** for local implementation – and under what circumstances Places might be encouraged to focus on a lower geographic scale from the outset.
    - The **timeframe for delivery**, both in terms of how the 10-year timeframe is to be understood, communicated, and any legacy investment beyond 2033, and the expected timescales and success criteria for different stages of the Initiative, particularly in the initial exploratory stages.
    - Any requirements that need to be satisfied, and recommended approaches, to establish a **holistic and comprehensive approach** to local heritage. This should provide a clearer definition of the term holistic and whether this indicates to Places that the full breadth of heritage should be included, as well as the circumstances under which Places would be encouraged to focus down on a particular theme or forms of heritage from the outset.

- The quality and standard of evidence to demonstrate that priorities and plans are **responsive to local needs**, and the circumstances in which Places can 'fast track' capital projects while exploratory work to understand local needs is an ongoing priority.

- Following this, the Heritage Fund are recommended to consider how this impacts on **Tranche One and Tranche Two delivery**, and what further guidance and support Places require to align more closely with the drivers:

  - For **Tranche One**, one-to-one 'progress check' conversations between the Heritage Fund area teams and the Places would provide an opportunity to reflect on local progress and approaches, and their alignment with any new guidance. This is envisaged as an open, collaborative discussion to understand what could be adjusted in current delivery, rather than a prescriptive, 'top down' imposition of a fixed model. Sharing example approaches from the other Heritage Places would help to position this as a 'ground-up' exercise to see if practice from elsewhere in the country can be adopted in any other Places. This process of wider learning can also be supported by peer-to-peer network sessions.
  - For **Tranche One and Two**, the Heritage Fund should review existing proformas which guide the delivery approach (detailed at 3.1 in the report), and consider how best to introduce and communicate changes to area teams. This could include example 'journey maps', 'decision trees' or 'guidance trees' that illustrate the key local conditions to consider at different stages of delivery and the potential approaches that might be best suited to respond to these local conditions. This would include responses and approaches by the Heritage Fund areas teams in terms of the support offered, as well as responses in the Places. This retains the principles of flexible, place-based working by not prescribing one single model or approach, but draws to area teams' attention the key considerations in providing further advice and recommendations based on experience from Tranche One and any renewed emphasis on particular aspects of the delivery drivers.

- **Heritage Fund area teams** are encouraged to continue sharing learning and good practice from their Places, considering whether there is value in establishing regular knowledge exchange sessions from herein which include policy and business insights and intelligence colleagues alongside representatives of area teams. Creating opportunities to record learning, in real time and at key intervals, via the Knowledge Hub, are also advised.

- A wider recommendation for this Initiative, and other place initiatives, is to review the **grantmaking process for the development phase** and the range of tools and workarounds that have been found to overcome challenges, in order to ascertain whether the open programme funding mechanism can be improved to better respond to the opportunities of place working during this phase. We understand that there are limits to the adjustments that can be made. However, this would potentially improve the practical operation of the Heritage Fund's position as flexible funder and enable better alignment with wider place funding initiatives in local areas. Scope within the open programme processes and procedures to offer longer-term revenue funding to lead organisations should be a key consideration, as well as 'starter grants' for new Places that can get early-stage funding into the Places more rapidly.

- For **Tranche Two decision making**, we recommend that the Heritage Fund incorporate learning from the evaluation into the proformas for local discussions and intelligence gathering. Namely, prompts which encourage local teams to consider the internal and external influences, and solutions, found to be pertinent in this first interim report to early progress in the Tranche One Heritage Places. Sharing with prospective leads and partners the challenges encountered by Tranche One leads and partners, as well as the benefits reported by consultees of long-term place-based funding, would support more frank and open discussions, and give prospective partners the confidence to discuss the challenges in their own local context and how they anticipate this might impact delivery. Considering that none of the Tranche One places mention any risks identified in the decision-making process to accept designation as a Heritage Place, the identification and analysis of risks should also be explored in greater depth in the Tranche Two selection process.

- Specifically, the Heritage Fund should give additional consideration to **local heritage infrastructure** in terms of the strength of mechanisms that convene heritage partners at all levels, and established and emerging capacity for partnership deliver of more ambitious schemes. To this end, further

consideration in the selection process of the presence of Heritage Development Trusts, Cultural Compacts and organic locality specific heritage networks and fora in local areas is encouraged, as well as their level of maturity.

- Exploring a wider range of **leadership models** in the Heritage Places is also recommended, giving consideration to hybrid / joint leadership in Places where there is complementarity between the partners, particularly in terms of community engagement, and a strong track record of co-delivery between potential leads.

- We recommend that the Heritage Fund make efforts with regards to **communication of the Initiative** more effectively to **strategic stakeholders** to support advocacy and local alignment of funding programmes in the Places, and that opportunities for **knowledge exchange between the Heritage Places** are built earlier into the process for Tranche Two.

- Evaluation recommendations for implementation, and any changes which arise, should be balanced against the fact that only 15% of the two-year funding allocation for the Initiative has been awarded to date i.e. that the impact of improvements to implementation are unlikely to counterbalance the overall under-performance of the Initiative's grantmaking, given the large variation between forecast and actual allocations and expenditure. We recommend the Heritage Fund consider best how to **reprofile funding allocations** across the 10-years in light of this variance, and the rationale and scope to adjust implementation in the Places indicated within this report, its findings and recommendations.

- Finally, the lack of a central, strategic lead for the Initiative within the Heritage Fund may be contributing to a lack of strategic direction in implementation. During Initiative inception, a dedicated policy lead was in place to help guide early set-up. Evidence from the evaluation suggests there may be an ongoing need for **strategic, 'thought leadership' within the Heritage Fund** to clarify the Initiative's purpose and form, apply learning from implementation and align this with the practice of area teams and partners in the Places.

Appendix 1: The Heritage Places

Each of the nine Tranche One Heritage Places is unique in its context, heritage, vision, and (emerging) strategies for achieving change. Here, we present a series of nine 'Place Profiles', which highlight key information about each Place, gleaned from across the various methodological steps undertaken so far. These Profiles take a high-level, summary look at the Places' positions as of January 2025, and can be referred back to as delivery of the Initiative progresses. Importantly, they include the Place's individuals perspective, including what success looks like for them.

Sauchiehall Street Culture and Heritage District, Glasgow: Heritage Place Profile

Overview

Sauchiehall Street Culture and Heritage District Heritage Place (SSCHD HP) aims to restore, regenerate and celebrate the built and intangible heritage of the area. Through designation of the area as a culture and heritage district, SSCHD HP will leverage the street's cultural institutions, communities, and historical assets to boost pride in place, support the district economy, and make SSCHD a vibrant place to live, work and visit.

The boundaries of this new district run from the Glasgow Concert Hall up to Charing Cross and the Mitchell Library, and include the parallel streets of Bath St and Renfrew St, its adjoining streets and the Garnethill neighbourhood. These boundaries reflect the functional geography of the area.

The SSCHD HP is currently governed, managed and delivered in partnership by Glasgow Life and Glasgow City Council. Glasgow Life is a community interest company (CIC) established in 2007 from the Council's cultural and leisure services and represents the largest charity of its kind in the UK. Glasgow Life is contracted by the Council to deliver cultural services, and manage cultural properties and collections owned by the Council. It also incorporates the destination marketing organisation for the city. The partners were awarded £350,000 in March 2024 for a development phase to grant to explore the tangible and intangible heritage of the SSCHD and use this evidence to develop a longer-term plan for the district.

Context

Sauchiehall Street is an iconic street which contributes to a collective sense of identity in the city via its extensive and significant built heritage, and its cultural and community heritage represented in the living memories of the street amongst city residents. It is a key part of Glasgow's public realm, with a string of high-profile cultural organisations along and adjacent to its route, representing the highest density of cultural organisations in Scotland.

Wider trends of high street decline, outward migration from city centres, as well as pre- and post-pandemic shifts in the leasehold office market have impacted the district's viability over time as both a commercial and residential hub of the city. Tangible and intangible heritage on the street is at significant risk, including six buildings 'at-risk'. The condition of these buildings is expected to deteriorate further without major investment in the social, cultural and economic regeneration of the area. Sauchiehall Street as a source of district and city pride in place has been adversely impacted by its decline. The demographic profile of residents on and adjacent to the street has changed over time, with now low levels of young and old (75% aged 20-44) and a large Chinese minority, which underlines the need to diversify uses to reflect the needs, place attachments and identities of these communities.

Strategic Fit and Place 'Readiness'

The City Development Plan (CDP) identifies Sauchiehall Street as one of three city centre streets which are prioritised for investment. The street is also a priority in the Glasgow City Centre Recovery Plan 2022-24, and in Glasgow City Centre Strategy 2024-2030, as well as the city's Culture Strategy. Ongoing public realm improvements in the district, including integrated pedestrian and cycle routes, are improving access, safety, and active travel, supporting the ambitions to establish a culture and heritage district. The partners cite prior experience from place-based heritage and cultural schemes, notably the Burrel Collection, as helping to prime both organisations to grasp the city's designation as a Heritage Place and work collaboratively at a district level. Longstanding and productive relationships with the Heritage Fund were also reported as favourable for beginning to work in place at a district level, with all partners already

well attuned to one another's understanding and experience of place-based approaches and principles, as well as the heritage needs along the street.

Successful transformations of heritage and cultural spaces and venues and their contribution to local social and economic wellbeing, including Kelvin Grove, Merchant City and the Riverside Museum, have contributed to high levels of cross-party support for culture and heritage as a driver of social and economic regeneration. The value of heritage assets is widely recognised and embedded in the city's political leadership.

Glasgow Life and the City Council report a long track record of successful partnership delivery for culture and heritage in the city, and there is mutual trust and understanding between the two organisations, strong and active working relationships as well as alignment of values, systems and ways of working.

Progress and success factors

Partners defined success during the development phase as two-fold:

1. Building a comprehensive and nuanced understanding of the ecosystem of the district and the synergies between heritage as well as non-heritage assets. By understanding all parts of the district ecosystem, partners expect to better identify how Heritage Places investment can provide additionality and contribute to the greater whole. Prioritisation of SSCD HP projects will emerge from this understanding of the ecosystem.
2. Balancing short, medium and long-term goals to maintain momentum across multiple timeframes. Partners are attuned to the need to sustain the 'flow' of activity, and prevent vacuums in activity that might put public and stakeholder support at risk. This was viewed in contrast to partners' expectations at the outset of this phase, that a comprehensive 10-year funding bid would be the main output from this work.

Partners regard the shared governance, management and delivery vehicle for the SSCHD HP as among the key success factors for progress at this point in their journey:

- Partners were primed to develop a successful joint funding application at pace, owing to the pre-existing strategic and operational alignment between the two organisations.
- Glasgow Life's independence is also regarded as beneficial, in terms of the capacity, capability and agility of the development team to lead the bid as an independent charitable body, with input and support from the city council.
- The familiarity and complementarity between the partners have enabled an initial place-based response to the Initiative opportunity, and management of the asymmetry in timescales to maintain early momentum:
    - Glasgow Life has established project visibility and positive PR (branding, communications and marketing, a physical presence for the project in a shop unit on Sauchiehall Street, cultural and heritage programming of the district) while progressing longer-term goals to map intangible heritage as the basis for future programmes of activity, commissioning the University of Glasgow to undertake this research.
    - Glasgow City Council is driving some forthcoming quick wins (restoration of small-scale, but culturally significant, heritage assets) while the longer-term outlook is explored internally at the city council and with partners (mapping listed buildings and buildings at risk, meeting with stakeholders to discuss capital needs).

In addition, partners report that Sauchiehall Street 'made sense' to all key stakeholders. Owing to regular dialogue between partners and with the Heritage Fund, Sauchiehall Street's heritage was a 'live' discussion, and all partners understood it's need, potential and opportunity from the outset. SSHCD also has currency with local people. Due to Sauchiehall Street's iconic status, it is instantly recognisable and logical to residents of the city as a location for a culture and heritage district. The policy and strategic fit were also strong, and there is a functional, and aligned, social, economic and cultural geography in SSCHD within which a culture and heritage district can take shape. Designation of the district as a dual culture and heritage district allows partners to explore where HP investment can maximise impact amid this interplay, and density, of heritage, cultural, social and economic activity.

Figure 1.13 View of Sauchiehall Street

Medway: Heritage Place Profile

Overview

Medway's Heritage Place aims to transform how heritage is understood, valued, and managed through extensive community engagement, shaping a co-created 10-year heritage strategy. The vision is for Medway's heritage community, in 10 years' time, to be empowered, connected, and networked, as well as ambitious about the scale, impact, and nature of heritage projects and how they benefit local people and place.

Medway Council is leading the Initiative which will be local authority wide; adopting a facilitative role to ensure it benefits both the wider heritage sector and local communities. The Heritage Strategy will act as a foundation for uncovering new themes and stories, keeping Medway's history dynamic and meaningful for residents across the five Medway towns (Rochester, Chatham, Gillingham, Rainham and Strood) and the Hoo Peninsula. Drawing on its rich and nationally significant maritime, military, and working-class heritage, along with its natural landscapes, the project seeks to empower local communities and the heritage sector with the skills and resources to lead sustainable initiatives that reflect Medway's diverse identity.

Context

The heritage sector in Medway currently struggles with fragmentation and limited collaboration, often depending on personal networks within small areas like Rochester. Improved coordination and investment are needed to address skills gaps in strategic planning and heritage-specific expertise, especially in relation to intangible heritage. Unfamiliarity and competition among organisations can hinder unification, with smaller groups lacking visibility compared to larger organisations, and support from the Council and funders tending to flow to these larger organisations as a result.

Despite these challenges, dedicated volunteers support several heritage sites, presenting opportunities for better coordination and skills development. Key sites could drive heritage advocacy and sector growth with dedicated planning and investment. Medway's heritage holds strong potential for cross-promotion and destination management, but its development as a tourism hub is currently limited by poor infrastructure, reduced Council funding, the closure of the Visitor Information Centre, and limited online promotion.

There is a perception among residents that heritage is not relevant to them, exacerbated by the perception that Medway's heritage lacks visibility in some areas and is often presented through outdated or superficial themes. Enhancing visibility through creative initiatives like walking tours or short-break packages is considered to be important. Moreover, addressing practical barriers, including poor signage, transport links, and infrastructure at remote sites, is key to improve access. In this vein, utilising the river as a key connector (and heritage site in its own right), for entry, transport, and linking heritage narratives, is considered a fundamental goal.

Strategic Fit and Partner 'Readiness'

Medway Council demonstrates strong 'readiness' for the Initiative, having laid strategic groundwork through initiatives like heritage tours, cultural roundtable discussions, the City of Culture bid, and the Chatham Intra High Street Heritage Action Zone. These efforts, along with the development of the Medway Cultural Strategy (2020-2030), aligned stakeholders around shared cultural and placemaking goals, positioning the Council to apply key lessons to heritage development. The timing of the development funding application aligned with the new One Medway Council Plan, ensuring the Heritage Places Strategic Initiative is integrated into the Council's emerging priorities.

While strong partnerships exist with key heritage stakeholders, gaps remain in engaging smaller grassroots organisations. The integration of heritage and culture under one service has enhanced internal collaboration and is gradually improving external partnerships. Developing formal infrastructure to support the heritage sector is a key focus for the next six to nine months, driven by strong sector interest and collaboration, as seen in the oversubscribed Open Space and Grant Community funding launches.

With its strong foundation, collaborative experience, and alignment with local strategies, Medway Council is well-positioned to deliver on the Initiative's goals, including organisational sustainability, inclusion, and access. Though infrastructure gaps remain, the Council's focus on partnerships, grassroots engagement,

and collaborative momentum provides a solid basis for long-term heritage development and placemaking success.

Progress and success factors

For the lead organisation, the success of Medway as a Heritage Place is defined, in the short and longer term, as:

- A thriving, well-resourced, confident, and ambitious heritage sector, encompassing both professional organisations and volunteer-led groups.
- Heritage as a driver of social and economic change, fostering local pride and stronger connections between people and place.
- Clear pathways into the sector for new projects, initiatives, and careers, with a focus on opportunities for young people.
- A cohesive, widely supported vision for heritage, with local, regional, and national buy-in from stakeholders and funders.
- Strategic positioning of heritage within Medway's local government to ensure resilience and continuity amid anticipated structural changes from the devolution agenda.

Following the project grant award, key successes include the development of a governance model and progress toward a long-term heritage strategy. Strategic programmes have been launched to address sector challenges through skills development and grant funding support, resulting in improved confidence and preparedness among beneficiaries. Collaboration within the local authority has been strengthened via an officer group aligning strategic priorities, while partnerships with key stakeholders and grassroots organisations have expanded. Relationships with national bodies like Historic England, the Arts Council, and the Heritage Fund have been enhanced, fostering discussions on future investments. Additionally, senior council leadership is now more actively engaged in heritage and regeneration initiatives, supporting increased alignment and successful funding applications across the sector.

Key factors contributing to progress include:

- Early collaboration and sector engagement, creating a foundation for strategic growth.
- Governance discussions that have helped establish alignment among stakeholders.
- A strong appetite for collaboration within the sector, demonstrated by the oversubscribed Open Space and Grant Community funding launch events.
- Supportive senior council leadership and strong relationships with national funders.
- Improved access to data and evidence to inform strategic decision-making and collaboration on an upcoming heritage strategy.

Despite capacity challenges, Medway regards itself as being on track, having laid strong foundations through early engagement, improved stakeholder alignment, and targeted support for the heritage sector. The local area is starting to be better connected, with growing confidence in funding and skills development.

Stoke-on-Trent: Heritage Place Profile

Overview

As a Heritage Place, in 10 years, Stoke-on-Trent will be a vibrant, world-class city celebrating its unique heritage and ceramics legacy, and recognised locally, nationally, and internationally. The city will champion community-led decision-making, entrepreneurship, and inclusive heritage, empowering residents to shape its policies and initiatives. Young people will feel proud of their heritage, connected to their city, and inspired to stay, work, and lead positive change.

Stoke-on-Trent's Heritage Place aims to drive this change by aligning with key local strategies, including the Corporate Strategy's focus on community empowerment, local decision-making, and asset transfers. Rooted in grassroots engagement, the Heritage Place will collaborate with communities using participation tools and hubs, empowering them to celebrate and manage their heritage, make decisions, and lead projects that foster local pride. A key focus is building capacity within the Community and Voluntary Sector (CVS) to secure funding and restore heritage, supported by expert consultants. Over time, communities will take greater ownership, making the project theirs, with young people actively involved in its development and delivery.

Stoke-on-Trent City Council is lead for the city-wide initiative, managed by the Culture and Heritage Programme Team with oversight from their Programme Board and support from other key council departments.

Context

The city consists of six distinct towns, often lacking a unified sense of identity or citywide collaboration. While working toward a shared vision as a Heritage Place, the geographical complexity of these towns presents a challenge. To address this, the lead organisation has carefully recruited consultants with local knowledge and experience. For example, they appointed a community engagement networker already rooted within local communities, galvanising the strength of existing connections, and building on a solid evidence base and knowledge of the areas.

Stoke-on-Trent holds a proud legacy as the historic centre of the ceramics industry, with diverse, internationally significant cultural and heritage assets, reflecting its global impact on pottery and industrialisation. These assets range from well-preserved sites to those on the at-risk register, emphasising the urgent need for protection and repurposing. The need to further explore and showcase the city's intangible heritage is also highlighted.

Stoke-on-Trent faces economic challenges, with lower-than-average salaries (£125 less per week) leading to reduced lifetime earnings and migration, particularly among young people. This, in turn, contributes to a weak knowledge economy and "brain drain." Despite these issues, the city is known for its resilient and resourceful local population, embodying a "can-do" attitude that creates opportunities even in adversity.

Despite its national and international historical significance, the city has yet to establish itself as a heritage tourism destination. Building a thriving visitor economy is challenging due to inadequate tourism infrastructure, including a shortage of hotels and limited transport options, such as poor road and rail networks.

Strategic Fit and Partner 'Readiness'

Stoke-on-Trent's Heritage Place demonstrated strong strategic fit and 'readiness', supported by foundational work and alignment with local partnerships and priorities. The 2022 appointment of a Heritage Programme Coordinator, funded by the UK Shared Prosperity Fund, led to the creation of the Heritage Development Trust, officially launched by Re-form Heritage in January 2024. The trust focuses on transferring council-owned assets and redeveloping key sites into housing, community centres, and flexible-use spaces.

The establishment of the Trust began alongside related initiatives, including the June 2022 Heritage Congress, which brought together key heritage stakeholders to build collaboration and gather input on future priorities. The local context was further strengthened in June 2023, when a change in administration led to a shift in corporate strategy, emphasising community engagement and placing communities at the core of decision-making regarding heritage asset development. This shift ensured that

the Heritage Development Trust's creation was closely tied to grassroots involvement, with communities playing a central role in determining how heritage assets would be preserved and repurposed. Internally, the council showed readiness by forming a Heritage Steering Group, chaired by the Leader of the Council and comprising representatives from private developers, stakeholders like Stoke Creates, Historic England, Arts Council England, and the Heritage Trust Network.

Stoke-on-Trent's designation as a priority place by Arts Council England significantly boosted cultural capacity, increasing National Portfolio Organisations from three to nine. Earlier efforts, such as the City of Culture bid, Levelling Up funding, and the UK Shared Prosperity Fund, created a collaborative foundation. The city's upcoming 100th anniversary, supported by the Centenary Restoration Fund, and its recognition as a World Craft City, further contribute to a solid economic and cultural vision for sustainable heritage development.

Progress and success factors

For partners, the success of Stoke-on-Trent as a Heritage Place is defined as raising community awareness of Heritage Places, ensuring the local community feel informed and involved in the Initiative, and tangible outcomes in heritage preservation and community engagement are achieved.
Although community engagement is still in its early stages, the Place hosted the National Trustee Board and community stakeholder in September 2024, which opened conversations on how local communities can engage with Heritage Places. A strong team of external consultants has been appointed, including a local community engagement networker who is doing the ground work for communities to engage with heritage and influence future strategy. For example, hubs are being set up in each town to engage residents directly, and partnerships with institutions like Staffordshire University and VAST aim to involve young people as future heritage ambassadors.

Efforts are also underway to map and identify priority tangible and intangible heritage assets. The team is engaging with heritage organisations to understand their needs and explore how potential Heritage Place funding could help them sustain operations, reach new audiences, and create a lasting legacy. Aligning consultation work with the 100th-anniversary celebrations, they have initiated outreach to various heritage organisations to discuss their involvement in the centenary events. Notably, one organisation has already applied for the Heritage Fund funding.

Heritage Places has already catalysed strategic development, prompting stakeholders to prioritise heritage preservation and establish a unified vision for its future. At a strategic level, a major shift has come in the form of an overarching vision for heritage in the city to "preserve, protect and enhance heritage". Supporting this, the Council has established a dedicated working group, chaired by the City Director, that brings together all heritage-related initiatives under one umbrella. By meeting every six weeks, the working group maintains momentum and ensures collaboration across all heritage projects, providing high-level oversight to confirm that commitments are being fulfilled. Their work also aligns with the development of a Heritage Strategy.

Key factors contributing to this progress include:

- Strong collaboration through the Heritage Steering Group and Working Group.
- Engagement with national and local partners, including Staffordshire University and VAST, to diversify community involvement.
- Integration with existing initiatives, such as the City's centenary events, Levelling Up funding, and the Heritage Prospectus.
- A structured approach to community capacity building, with workshops planned for funding applications, business planning, and asset transfers.
- Heritage Places acting as a catalyst for prioritising heritage development and mobilising significant funding for refurbishment and preservation projects.

Armagh City, Banbridge and Craigavon Council Area: Heritage Place Profile

Overview

The Armagh City, Banbridge and Craigavon Heritage Place aims to increase understanding, awareness and appreciation of the borough's diverse tangible and intangible heritage. It intends to do this by bringing new and established communities together, throughout the entirety of the borough, to recognise and celebrate the Borough's heritage, as well as the distinctive cultural and community heritage of individual communities. Heritage will be widely recognised for the contribution it makes to quality of life and placemaking, increasing financial and human investment in heritage, from a more diverse range of sources.

The Armagh City, Banbridge and Craigavon Council Area Heritage Place is currently governed, managed and delivered by Armagh City, Banbridge and Craigavon Borough Council. External consultants have been appointed to project manage the development of a Heritage Places strategic plan, and assist in engagement and production of a Heritage Strategy. Local communities will also be engaged as co-creators, to develop projects, actions and implementation of Heritage Place activity.

Context

The Armagh City, Banbridge and Craigavon Council Area encompasses villages, towns, and one city (Armagh), all with their own distinctive character. Armagh is the oldest city in Ireland and has the highest density of listed buildings in Northern Ireland. It is also the location of Navan Fort which is one of six Royal Sites of Ireland which comprise a transnational bid for UNESCO World Heritage Site status. Armagh Observatory is also among the Astronomical Observatories of Ireland, for which a further transnational UNESCO World Heritage Site bid is underway. With two UNESCO bids underway, this underlines both the significance of Armagh's heritage as well as local commitment to, and leadership of, heritage.

Figure 1.14 Skyline of Armagh City

Across the borough, there is rich natural heritage, including the River Blackwater, the River Bann and ancient bogs and wetlands which provide a source of myths, stories and legends. The borough also includes five urban conservation areas and 16 areas of townscape character.

Poor connectivity across the borough contributes to a sense of fragmentation of urban and rural localities, and creates barriers to communities accessing heritage across the whole area. There remains an association locally between heritage and social class, which poses an additional barrier to accessing heritage, particularly in a borough which is ranked as one of the most deprived in Northern Ireland. Coupled with declining investment in arts and heritage by both governments and their non-departmental public bodies (NDPBs), the risks to heritage in Armagh City, Banbridge and Craigavon Council Area are wide-ranging and increasing and the protection of heritage is an urgent priority.

Nationally, Armagh City, Banbridge and Craigavon Borough Council is one of few local authorities which advocates for heritage, and understands its impact and significance for communities and tourists alike.

Heritage Places has provided the Council with the opportunity to harness the placemaking potential of heritage, through the development of a dedicated heritage strategy for the borough.

Strategic Fit and Place 'Readiness'

Recent initiatives within the borough include the Heritage Fund's three Townscape Heritage projects, which have helped to restore built heritage, transform urban spaces, and reverse outward migration from city and town centres. The heritage-led regeneration of Armagh Gaol features in the borough's City Deal as one of three proposals put forward by the Council and community arts initiatives, including the Art Fund Going Places project, are helping both new and geographically isolated communities to share and express their unique cultural identities.

More broadly, Armagh City, Banbridge and Craigavon Borough Council is the largest in Northern Ireland, after Belfast, and pre-existing policies and plans, such as the Community Plan and Corporate Plan, demonstrate its commitment to sustaining and supporting placemaking through economic growth, community wellbeing and environmental sustainability.

Despite the failure of the borough's UK City of Culture bid, the process to develop the bid has renewed commitment to culture and heritage in the area. Armagh City, Banbridge and Craigavon Borough Council owns several heritage assets and has demonstrated strong civic leadership by promoting community engagement in heritage, and acting as a driver and enabler of heritage led regeneration within the borough.

Historically, heritage-led regeneration approaches within Northern Ireland have been rare. The value of heritage and its associated benefits are well grasped by the Council, but the challenge remains in defining what heritage means for communities in the borough. Additionally, capacity within the broader heritage sector remains significantly under-developed across the country due to historical under-investment in the sector and heritage-led placemaking.

The work undertaken as part of Armagh City, Banbridge and Craigavon Council Area's Heritage Place will align to the Culture, Arts and Heritage Strategy, produced by the NI Department for Communities. A report titled 'Investing in Creative Delivery' was published as part of this strategy, reorientating how the culture, arts and heritage sectors are collectively perceived, engaged, and supported across government. The report maintains that "aligned investment across local Councils, Executive Departments and public bodies can amplify transformative impact in communities and for the organisations, people and places all these organisations invest in and support." Armagh City, Banbridge and Craigavon Council Area Heritage Place echoes this view, having witnessed first-hand the impact of heritage through the success of its recent heritage initiatives.

Progress and success factors

Prior to designation as a Heritage Place, Armagh City, Banbridge and Craigavon Council Area's bid for the City of Culture identified opportunities to connect arts and heritage and engage communities. In addition to the Townscape heritage schemes delivered in the borough, Council consultees for the evaluation felt this positioned them well to lead the Heritage Places initiative.

Once designated as a Heritage Place, the Council prioritised early engagement of communities to identify their priorities for heritage, and what it means to – and can do for - them. To support this widespread community engagement, a full-time Heritage Places Engagement Officer was appointed in November 2024. Supporting the Heritage Places Engagement Officer is the Engagement Plan, consisting of various community outreach approaches. This work is regarded by Council consultees as progressing well.

This engagement work will culminate in the drafting of the Heritage Strategy, which will explore the link between heritage and placemaking, enabling local heritage priorities to be drawn out for the next phase of funding.

The success of Armagh City, Banbridge and Craigavon Borough Council's development phase will be defined not only by the creation of the Heritage Strategy, but also by the success of the process to develop it – and the improved relationships and capacity building within the sector. In turn, it is hoped this will drive the wider heritage agenda at the national level, and result in the delivery of heritage activity that benefits the entire borough.

North East Lincolnshire: Heritage Place Profile

Overview

The North East Lincolnshire (NE Lincs) Heritage Place aims to identify and connect communities across the borough to local heritage, increasing pride, identity, and optimism within the area. Through designation of the area as a Heritage Place, NE Lincs hope to develop a thriving and sustainable ecosystem of heritage citizens and heritage organisations that will drive placemaking. This will position NE Lincs as a heritage destination where residents and visitors can explore stories and experiences that thread through its natural heritage, focussing on connecting this with cultural/built heritage to support environmentally sustainable projects.

North East Lincolnshire Council (NELC) will govern, manage and deliver NE Lincs Heritage Place. The project will be delivered under the direction of NELC's Environmental Board, the Chair of which has final decision-making responsibility on the advice of board members and project assurance officers.
In addition to the scoping activity award, NE Lincs Heritage Place has been awarded £250,000 to support the Dynamic Understanding of the Natural Environment (DUNE) project to explore options to save and better protect the fragile coastline. The site has several nature conservation designations including being a Site of Special Scientific Interest (SSSI). This project will also support opportunities to increase access, inclusion and participation for local communities and visitors through an activities and education programme.

Context

NE Lincs is rich in natural heritage, built heritage, maritime heritage, intangible heritage and cultural heritage, much of which is connected by the coastal geography of the area. Despite this, NE Lincs faces ongoing challenges owing to low levels of cultural and heritage engagement, with some of the lowest levels reported in the country (32.5 per cent). This long-standing disengagement increases the risks to heritage, since the value of heritage is neither widely recognised nor appreciated by the local community. This is further reflected in historically low levels of arts and heritage investment in the area. This scarcity in funding has been a barrier to developing a more collaborative and capable heritage community. Work, however, to develop capacity in the sector, was begun through Areas of Focus, and was able to shift mindsets, providing a platform for further development of heritage networks via the Initiative.

The potential damage to the area's natural and built heritage assets pose a further risk to heritage, including the risks presented by coastal erosion and climate change. The risks are compounded by the ageing population in the area, alongside a lack of diversity in heritage leadership, and a decline in the traditional industries that once sustained the area's heritage skills.

Strategic Fit and Place 'Readiness'

NE Lincs was designated an Area of Focus in 2018, aiming to drive heritage investment across the borough. This resulted in a strong working relationship with the National Lottery Heritage Fund (for example, the Heritage Fund Northern Committee met in Grimsby in 2023). Previous initiatives such as the Cleethorpes Townscape Heritage Programme and the regeneration of Grimsby Docks have additionally bolstered this relationship, and the presence of anchor heritage organisations such as the Fishing Heritage Centre, Horizon Zone, and Weelsby Hall all contributed to NE Lincs's preparedness to become a Heritage Place. This recent investment in heritage in the area has meant that the benefits to date are only just beginning to materialise, demonstrating the importance of continuing investment in heritage.

NE Lincs Heritage Place aligns to local priorities, including the Council Plan 2023-26, Grimsby Town Centre Masterplan (2020) and Cleethorpes Masterplan (2020). The Heritage Place is also supported by the Creativity Strategy (2022), which outlines several stories that are of great significance to NE Lincs, and which will help deliver heritage and cultural activities across the area. Using these stories will help start a dialogue, providing a vehicle for the community to (re)consider their awareness of and engagement in heritage, and its relevance and prominence. The focus of scoping work will define the details of further work, which in turn will determine the exact heritage focus.

Taking these local priorities and previous heritage initiatives into account, NE Lincs has developed strong foundations from which to deliver a continuation of the heritage activity that has been dispensed over the past seven years. Challenges remain, however, around the area's heritage eco-system and the capacity to deliver, in addition to understanding exactly what being designated as a Heritage Place means for NE Lincs, especially in terms of stakeholder engagement.

Progress and success factors

The transition from designation of an Area of Focus to a Heritage Place has reportedly been seamless, with NELC having had regular correspondence with senior individuals at the Heritage Fund at the outset and prior to designation. Following designation as a Heritage Place, NELC attended a workshop convened by the Heritage Fund to understand the long-term ambitions of the funding and what being a Heritage Place may mean for NE Lincs. Previous grant recipients were invited, alongside staff from the Heritage Fund, which in turn helped scope the bid.

Success at this stage is inextricably linked to the legacy of the Area of Focus, and the seamless transition between this and Heritage Places. As such, NELC defined success at this stage as three-fold and encompassing the cumulative achievements and impacts that have emerged or are expected from both Initiatives:

1. Recognising the scale and potential of heritage within the area. There has been a seismic shift in how NE Lincs, as an area, views and understands heritage since the Area of Focus designation. Heritage Places will further efforts to recognise, protect and unlock benefits from the breadth and depth of heritage across the borough, increasing participation and enjoyment.
2. Increasing the scale of heritage activity delivered within the area. By providing the financial means to deliver heritage initiatives, NELC expect to see an even further increase in heritage activity through Heritage Places.
3. Building relationships and sustaining these to increase the opportunity to deliver heritage projects collaboratively, developing the capacity of local organisations to build a strong and thriving heritage eco-system.

Torbay: Heritage Place Profile

Overview

Torbay is a borough within the unitary authority of Devon which is made up of the three resort towns of Torquay, Paignton and Brixham. The lead organisation for Heritage Places in Torbay is Torbay Council.

Through heritage regeneration, strengthening the connection between communities and heritage, and building the foundations for sustainability in the sector, heritage will support Torbay to be a healthier and happier place. In order to achieve the long-term vision for Torbay, it is important to build trust between communities and all heritage actors, to engage all individuals in Torbay's heritage, and to build the capacity of the sector, through skills provision and support for heritage initiatives. There is a particular focus on engaging young people, with the hope that this increases pride in place and inspires the next generation to take ownership of Torbay's heritage.

Three successful funding applications are now underway in Torbay. Torbay Council's development stage project focusses on building the capacity of the local authority, filling gaps in data and evidence, and increasing engagement. Torbay Museums Trust on the other hand plan to use resilience funding to create a new vision and strategy for the museum, while TerraFirma will support the UNESCO Global Geopark Status by building organisational resilience, engaging communities and audiences, and developing people and partnerships.

Context

Torbay's location on the coast, its popular beaches, and recreation and leisure attractions, make it a popular tourist destination. As such, tourism is the dominant industry in Torbay. However, Torbay was impacted heavily by the reduction in footfall caused by the Covid-19 pandemic, ranking first in the UK for post-pandemic economic risk. Furthermore, the seaside location creates concerns about flooding and climate change. The area also has high levels of deprivation. Other challenges facing the area include the ageing population in Torbay. There is a challenge to keeping young people within Torbay; which both increases economic pressures as well as contributing to the heritage skills deficit in the bay.

Torbay has a vast and high-value heritage offering, with a number of internationally significant heritage assets in terms of built, natural and intangible heritage, such as the UNESCO Global Geopark status, Torquay Museum, and Torbay's association with culture, music, film and entertainment. Despite this, the heritage and wider heritage sector in Torbay face a number of challenges. Due to the seaside location, heritage assets can be expensive to restore and maintain. Further to that, many heritage assets are located in areas of high deprivation. Additionally, the region's infrastructure requires significant investment to improve accessibility to heritage sites.

Strategic Fit and Place Readiness

Torbay Council's Community and Corporate Plan is a 20-year plan (2023-2043) which offers a close strategic fit to Heritage Places. The plan sets out the council's vision, objectives and priorities which look to make Torbay a "happy, healthy and prosperous place" for the whole community. Notably, the plan has strong links to community and people, along with a focus on pride in place. Partners also highlighted that it closely aligns with Heritage Places focus on young people, via the need identified in the Plan, "to develop and enhance opportunities for young people".

However, the Cultural and Heritage Strategies in Torbay were described as fragmented, with little alignment between the two. It is hoped that after the upcoming review of the Cultural Strategy, these will be more cohesive, in addition to being more closely aligned with Heritage Places. There is a strong existing relationship between Torbay Council and Historic England, and this stakeholder is expected to provide wider support for delivery of Heritage Places. Furthermore, The Torbay Culture Board, which will be crucial to the delivery of Heritage Places, provides support in terms of delivery capacity. Partners did however identify that board representativeness could be improved, and its influence on local decision making increased.

In terms of readiness for Heritage Places, Torbay Council faces some internal challenges, such as resourcing and the level of support for heritage. However, resourcing is something that has begun to be addressed with early Heritage Places activity. Furthermore, there is still some way to go to broaden mindsets and narratives around heritage, and demonstrate the value heritage can provide to the local economy, to help raise its profile internally.

The history of Torbay and its three towns, Brixham, Paignton and Torquay, means that there are, in some cases, conflicting ideas around identity within the bay. Partners highlighted that unifying individuals and organisations within the three towns can be a challenge.

Progress and Success Factors

Partners highlighted a number of factors in relation to early successes of Torbay as a Heritage Place. Early progress has been made in reducing gaps in delivery capacity with the employment of heritage staff in key roles. Not only were key roles filled, but partners also highlight the wealth of heritage expertise brought into the team and Heritage Places by these new postholders, which contributes to the professionalisation of the heritage team and credibility to local partners across the three towns. This has contributed towards the strengthening of relationships both within and outside the council and with the heritage sector more broadly.

Early work on Heritage Places in Torbay includes the development of a Heritage Places working group. This group is comprised of various local heritage actors and the council and has supported the gathering of views of the wider sector, helping to build trust and increase knowledge. Information is then channelled upwards within the council via the Heritage Places Project Management Group. This contributes to a wider strategy of increasing the political support for heritage and bringing heritage into the wider conversation. Partners note there has been early success internally in terms of widening the perspectives of senior leaders to appreciate the broader value of heritage to placemaking.

Leicester: Heritage Place Profile

Overview

Leicester's heritage landscape is distinctive and diverse, reflecting the city's vibrant history and its status as the first 'majority minority' city in the UK. The Leicester Heritage Place aims to restore, regenerate, and celebrate both the built and intangible heritage of the city. Through an inclusive approach, Leicester seeks to strengthen shared identity, foster community pride, and enhance accessibility to Leicester's rich cultural history. The initiative will leverage Leicester's diverse heritage sites, traditions, and historical narratives to create a more connected and engaging environment for residents and visitors.

Context

Leicester is home to a wide range of historical and cultural assets, including museums, religious and civic buildings, sporting and cultural facilities, parks, waterways, and social centres. The city's heritage includes both tangible elements, such as Leicester Castle and the Jain Centre, and intangible traditions tied to its diverse communities. However, many of these assets remain underutilised or underrepresented in mainstream narratives.

The Inclusive Heritage Project within LHP aims to address these gaps by engaging with communities to redefine heritage in a way that is meaningful to them. The project will support at-risk heritage, including spaces and stories that may be lost over time due to generational shifts and urban changes. It will also focus on Leicester's role in historic movements, such as the Windrush generation's impact and the history of the city's textiles industry.

Strategic Fit and Place 'Readiness'

Leicester's commitment to cultural and heritage-based regeneration is embedded in citywide strategies, including the Cultural and Creative Industries Strategy. Ongoing investments in heritage, such as the redevelopment of Leicester Museum and Art Gallery and the Heritage Information Panels project, highlight the city's dedication to preserving and sharing its history. The initiative aligns with these efforts by ensuring that underrepresented communities have a voice in shaping Leicester's heritage narrative. A key component of the project is the recruitment of Community Heritage Researchers (CHRs) who will engage in co-designing heritage themes and activities with diverse communities. The project will facilitate knowledge-sharing networks, capacity development programmes, and storytelling initiatives to deepen public engagement.

Progress and Success Factors

Leicester defines success through:

- Establishing a comprehensive understanding of Leicester's tangible and intangible heritage.
- Bridging cultural engagement gaps by elevating community voices in heritage narratives.
- Supporting at-risk heritage through collaborative preservation and promotion efforts.
- Ensuring sustainability through strategic partnerships and long-term investment in heritage education and infrastructure.

The initiative will be governed through a partnership between Leicester City Council and key cultural stakeholders, including universities, community organisations, and heritage institutions. This collaborative approach will provide a foundation for future projects that integrate Leicester's diverse cultural histories into a cohesive and inclusive heritage framework.

Next Steps: The development phase of Leicester as a Heritage Place will involve:

- Conducting citywide consultations to identify key heritage themes and priorities.
- Establishing a steering group with representatives from various communities and organisations.
- Designing pilot projects that showcase Leicester's heritage through exhibitions, digital storytelling, and community-led events.
- Securing long-term funding and investment to sustain the initiative beyond its initial phase.

Although they have not been able to begin their project delivery as a Heritage Place yet, due to legal proceedings taking longer than expected, the local authority plan to recruit a programme manager in due course to progress work. By adopting an inclusive, community-centred approach, Leicester aims to position itself as a national leader in heritage engagement, ensuring that all residents can see themselves reflected in the city's evolving narrative.

Figure 1.15 Punk clothing display in a Leicester museum

Neath Port Talbot: Heritage Place Profile

Overview

Located in South West of Wales, Neath Port Talbot is a local authority covering an area that stretches from the coast to the borders of the Brecon Beacons National Park. Heritage Places in Neath Port Talbot is being led and facilitated by Neath Port Talbot Council.

The vision for Heritage Places in Neath Port Talbot (NPT) aligns to the wider Culture and Heritage Strategies and Corporate Plan for the area. These set out the ambitions of NPT that by 2030, it will be a nationally recognised destination for its high quality, accessible and varied offer of heritage, culture, arts and sport. This exceptional cultural offer will contribute to improved wellbeing for local residents, helping to deliver all seven wellbeing goals of the Future Generation's Act. The culture of NPT and the Welsh language will thrive, and heritage, arts and sport will create skilled and satisfying jobs, improving people's health and sustainably growing the economy. The benefits unlocked by heritage will help to ensure its conservation, protection and sustainability up to 2030 and beyond.

To date, there have been two successful funding applications in Neath Port Talbot. Canal Connections, run by Neath Port Talbot Council, is a feasibility study looking into the restoration of the canal structure in the area. This canal structure lies at the heart of the Council's 'Vale of Neath Heritage Corridor Masterplan', a corridor of key destinations which focus on heritage and the great outdoors. Pathways to the Past, on the other hand, focusses on involving volunteers and connecting communities in Neath Port Talbot to their heritage. This project is run by Tempo Time Credits and looks to find a solution to the reduction in, and increasing age of, volunteers in Neath Port Talbot.

Context

Neath Port Talbot is the eight most populous local authority in Wales. It has the lowest employment rate in the country and the local economy relies heavily on the manufacturing industry, making up more than a fifth of the total jobs in the area. As such, the closure of Tata Steel, which previously employed roughly 4,000 individuals, will cause large scale unemployment and uncertainty in the area. It is uncertain what impact the recent opening of the Celtic Freeport will have on the region.

Neath Port Talbot boasts a diverse array of heritage assets, landscapes and stories, extending through its industrial heritage as well as encompassing its pastoral and medieval landscapes. These heritage assets include Margam castle, Park and Abbey Church, Neath Abbey, and the famous canal structure. However, the condition of many heritage assets is deteriorating, including the canal, as well as key listed buildings and monuments.

The heritage sector in NPT benefits from experienced and passionate staff, committed volunteers and voluntary groups as well as ground up enthusiasm for heritage among residents and volunteers. However, the sector is challenged by an ageing volunteer population, skills shortages and gaps among the existing volunteer population, as well as weak financial resilience among grassroots heritage groups and organisations, evidenced by an overreliance on the local authority for funding. Further to that, partners explained how many of these groups and organisations struggle to acquire the requisite insurance to work at greater scale, which limits their delivery potential.

Strategic Fit and Place 'Readiness'

Neath Port Talbot was in a strong position at the time it was awarded Heritage Place status, benefiting from recent policy and strategy work to refresh the Corporate Plan, and develop both a Culture Strategy and Heritage Strategy. These strategies lay the foundations for regeneration, specifically heritage led regeneration in Neath Port Talbot up to and beyond 2030. Despite these plans being in place, partners suggested that they were not yet fully embedded, and that further work was required to embed and align the individual plans. As part of the development of these plans, wide-ranging consultation with residents has been carried out to help shape the vision.

In the wider sector, effective partnership working between the local authority and heritage organisations will be crucial to the delivery of the Heritage Places vision. There is a vast array of knowledge within the sector locally, and the heritage community represents a varied heritage landscape and range of cultural identities. Further to that, there is a lot of energy and support for Heritage Places. However, the sector is considered to be somewhat fragmented despite gains made via the previous Area of Focus initiative in

NPT, which presents challenges to achieving equal representation in the governance and delivery of Heritage Places.

The sector is also impacted by broader pressures on funding and investment brought about the closure of Tata Steel and the cost-of-living crisis. The outcome of the local election in 2027 remains a large unknown that could present both challenges and/or opportunities depending on the policy priorities of the elected party.

Progress and Success Factors

Prior investment in the development of plans, such as the Corporate Plan, Culture Strategy and Heritage Strategy, is regarded as a key success factor in NPT, providing a clear vision for Heritage Places, and providing direction for early project delivery towards this vision via the two current awards, which focus on the challenges facing heritage volunteering and blue heritage assets and infrastructure (the canals).

The development of the existing / ongoing plans and strategies highlighted above, involved large scale community engagement around similar themes, reducing the need for this to be duplicated in the early stages of Neath Port Talbot's Heritage Place delivery. Previous recruitments at the local authority to deliver Areas of Focus have been extended, maintaining delivery capacity within the local authority, and allowing for continued community engagement, which is supports ongoing positive relationships and continuity. Discussions with partners identified this as crucial to increasing support for, and knowledge of, the Heritage Places opportunity. This has been further demonstrated by strong engagement from the community, on forums, and from Swansea University.

Shared Prosperity Fund (SPF) funding is being deployed to support heritage projects in the area, providing a shorter-term, rapid funding mechanisms to advance progress towards the overall vision in Neath Port Talbot. This complements investment via Heritage Places although it was highlighted that there are some asymmetries between these funding mechanisms.

Shildon and Newton Aycliffe, County Durham: Heritage Place Profile

Overview

The Shildon and Newton Aycliffe (S&NA) Heritage Place (HP) aims to recognise and celebrate the emotional and physical connection of local people with heritage: the transport heritage in both towns, including their shared connection to the Stockton and Darlington Railway (S&DR) as well as the emerging heritage in Newton Aycliffe owing to its distinctive built heritage as a Post-War New Town.

It will provide new social, civic and economic opportunities for local people so that heritage provides new, as well as established, sources of pride and optimism locally, contributing to shaping a positive future for both towns. At the end of the 10-years, the ambition is that Shildon, the world's first railway town, will be recognised as a World Heritage Site, children and young people and others will have access to heritage professions and skills, and sustainable heritage-led regeneration of anchor heritage spaces will have boosted the local economy.

Durham County Council (DCC) is the lead organisation for the S&NA HP, working collaboratively with local heritage and community partners in both towns who have provided community input into the preparation of a development stage funding application. In October 2024, DCC was awarded £250K for this project, with delivery expected to commence in February 2025.

Context

The condition and sustainability of the towns' transport heritage has improved in recent years through various initiatives including the designation of the S&DR route as one of Historic England's Heritage Action Zones. Outstanding and immediate risks to this heritage remain however including the viability of the premises for both the Shildon Railway Institute and the Newton Aycliffe Bus Preservation Society, as well as the longstanding risks that arise when communities are not meaningfully connected to this heritage - young people in particular. The emerging built heritage in Newton Aycliffe is also under-developed, recognised and valued.

The upcoming centenary celebrations and legacy activities for the S&DR in 2025, the bicentenary of the Shildon Railway Institute in 2033, and the 80th birthday of the first northern new town in 2027 provide opportunities to align with wider initiatives, as well as linking with the recently opened The Story museum in Durham. DCC's ACE-funded Place Labs provide resource and mechanisms for engagement with young people.

Both Shildon and Newton Aycliffe West wards are 'left behind neighbourhoods' in the top 10% most deprived in the country and top 10% areas most in need in the Community Needs Index. They lack decent transport links, digital connectivity as well as community and social infrastructure. Local heritage partners describe a feeling of 'left behindedness' among local residents and that local pride continues to be sourced from past achievements rather than current assets and opportunities in the towns. Despite their close proximity, collaboration and partnership working between the two towns has been limited to date.

Strategic Fit and Partner 'Readiness'

The focus on Shildon and Newton Aycliffe reflects a strategic approach to place which is embedded at multiple levels in County Durham's policy framework, via the local authority's Corporate Plan, strategic Place Plans for individual settlements, as well as the County Durham Partnership's Inclusive Economy Strategy. Heritage Places is regarded as one of several tools to support economic growth, educational attainment and health and wellbeing in the two towns. It also aligns with the culture service's focus on place, storytelling, inclusivity and diversity. By centring children and young people, Heritage Places seeks to develop counternarratives to external place perceptions of the area. It responds to the findings of local authority research which highlights the persistence of narratives associated with the area's mining history, and a predominantly masculine place identity.

Economic development colleagues have been receptive and responsive to the Heritage Places designation, as well as those in the culture service who are leading the Initiative internally. With 384 different settlements and 12 main towns dispersed over a large geographical area in County Durham, the economic development team has developed a strong focus on place, leading on town and village regeneration. Both teams worked closely prior to Heritage Places and share a commitment to co-production, which dovetails with the collaborative approach encouraged by the Initiative.

Understanding and appreciation of heritage as a route to social and economic wellbeing was less widely recognised however by local partners prior to Heritage Places, both within and beyond the heritage sector. Engaging with a range of partners to explore how heritage can contribute to social and economic regeneration, has therefore been the focus of early strategic work in S&NA to prepare for delivery. In addition, lead organisation consultees recognised that the evidence base for heritage-led regeneration in the two towns was scattered and fragmented, and that further work would be required to explore communities' priorities for heritage.

Progress and success factors

Co-production has been central to the S&NA HP approach to date. At the outset, S&NA's dual designation as a Heritage Place was predicated on gaining approval for this approach from both communities. Local partners were also invited to contribute to developing the vision and priorities for the Initiative. This process was conducted at the individual town level first, before partners across both towns were brought together to create a shared vision for S&NA HP. Economic development colleagues were also participants in this process. Partners then nominated representatives of both towns to join an 'editorial group' to support preparation of the first funding bid. This process reached beyond the 'usual suspects', engaging local youth groups and food security projects as well as local heritage organisations.

Although one of the last Places to submit their first, development stage application, this collaborative approach has led to some early successes in S&NA HP. Over the course of several workshops with local partners, priority groups and priority heritage have been identified and agreed by stakeholders in both towns, and lead organisation consultees provide anecdotal evidence that mindsets towards the Initiative and heritage more generally are starting to change. Local partners are thinking longer-term and more strategically about how the investment can support wider, shared placemaking goals in both towns, particularly in relation to improving opportunities for children and young people. The more parochial interests which brought partners to the table in the first place, are now balanced out by this longer-term, placemaking perspective. The activities which will be delivered through DCC's development stage award bear the fruits of this early work with partners and communities, encompassing investment in shared priorities for long-term success, such as evidence gathering and co-production with young people, alongside exploring the options for specific heritage assets in both towns via feasibility studies and business planning.

DCC is currently working through a refresh of its local Place Plans and, since becoming a Heritage Place, Shildon has been fast tracked up the list to third position; a decision which will unlock more levers for the local authority and its partners to maximise the benefits of Heritage Places for the two towns.

Figure 1.16 An aerial view of Shildon, County Durham