

**RESILIENT HERITAGE
PROGRAMME EVALUATION**

Final Report

July 2020

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EXECUTIVE SUMMARY

Introduction

The National Lottery Heritage Fund commissioned DC Research Ltd to carry out the Resilient Heritage Programme Evaluation. The evaluation commenced in 2018 and concludes with this final report (produced in April 2020).

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

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

The key aspects of the method for this final report included: desk-based research; a survey of organisations engaged in the programme between October 2018 and the end of the programme as Strength Checker users and/or grant applicants; a survey of Resilient Heritage projects; and a range of case studies.

Engagement with Resilient Heritage (Section 2)

By the end of the programme, there were a total of **672 applications for Resilient Heritage grants**.

Of these 672 applications, **56% were successful** and **41% were unsuccessful**, with the remaining 3% categorised in other ways.

Resilient Heritage awards were made to a total of **377 projects**. These awards were for a **total value of £22,192,300**, with the awards **ranging in size from £4,000 to £250,000** – the average size of award was £58,866.

By the end of November 2019, there were a total of **1,165 registered users of the Resilient Heritage Strength Checker**.

The **vast majority (81%) of respondents to the 2020 survey had submitted an application for a Resilient Heritage grant**. This is higher than previous surveys (61% in 2018 and 70% in 2019), showing the proportion that engaged with the Resilient Heritage programme *only* through the Strength Checker decreased over time from 39% (2018) to 30% (2019) and to 19% (2020).

The **vast majority of organisations (87%) reported that they did make use of the Strength Checker in the development of their grant application**.

Current Perspectives on Resilience (Section 3)

The National Lottery Heritage Fund provides an explanation about what The Fund's investment should lead to in terms of resilience within the context of The Fund's Outcomes, where outcome 7 is about resilience:

The funded organisation will be more resilient - What this outcome means

If your project is a success, your organisation will have greater capacity to withstand threats and to adapt to changing circumstances to give you a secure future.

You will achieve this through stronger governance and greater local involvement in your organisation, increased management and staff skills, fresh sources of expertise and advice, and working in partnership to share services, staff and resources.

Source: <https://www.heritagefund.org.uk/funding/outcomes#outcome-7>, accessed 8th April 2020

When Resilient Heritage Survey 2020 respondents (i.e. organisations involved in the Resilient Heritage programme between late 2018 and the end of the programme¹) were asked to explain what resilience meant for their organisation, many aspects of The Fund's explanation were reflected in the responses received, showing that **the (often multi-faceted) understandings of resilience from heritage organisations aligns with The Fund's explanation.**

In terms of gaps in the responses, relative to The Fund's definition of the outcome, there is **practically no mention of 'withstanding threats'** in the responses, and whilst aspects around 'survival' do appear, it is mentioned by only a handful of respondents – far fewer than in the previous surveys in 2018 and 2019.

'Fresh sources of expertise and advice' is hardly mentioned in the responses, with 'advice' not appearing at all, and 'expertise' very infrequently – although many organisations do recognise the importance of improving skills for trustees, staff and volunteers, and as such are accessing expertise via this route.

Also (as highlighted in previous evaluation reports) **notable by its absence** is that there is **no mention of working in partnership to 'share services, staff and resources'** – neither 'sharing' nor 'share' appear in any responses, and 'partnership' only appears in relation to responses from individual partnerships – 'working in partnership' is not explicitly mentioned by any respondent.

Literature and previous research on models of partnership working (including in the heritage context), highlight that this type of partnership working (sharing staff/resources) is one of the most challenging aspects of partnership working. If The Fund is keen for these aspects of resilience (and 'working in partnership to share services, staff and resources' in particular) to be further developed it may be that specific support or advice on how to develop/achieve this is required.

Organisations responding to the Resilient Heritage Survey 2020 were asked to score their organisation's current level of resilience (out of 10, where 0=low and 10=high), and the **average score (as well as the median score) across all respondents was 5.6**, with responses ranging from 0 through to 9.

¹ This includes both Resilient Heritage Strength Checker users and Resilient Heritage grant applicants.

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

More than three-quarters (78%) of respondents stated a positive change in their organisation's resilience, with almost one-fifth (17%) reporting that their organisation has become 'much more resilient' in recent years.

Resilient Heritage Strength Checker (Section 4)

The **vast majority (95%) of respondents are aware of the Resilient Heritage Strength Checker,** and **more than nine out of ten respondents (93%) who are aware have made use of the Strength Checker.**

The level of awareness (95%) in 2020 is the same as the Second Interim Report Survey (2019) and slightly higher than the First Interim Report Survey (2018) which was 91%. This shows that awareness of the Strength Checker has remained very high throughout the evaluation, increasing slightly over time.

The **most common route (by far)** through which organisations became aware of the Strength Checker, was via **the Resilient Heritage grant application process (77)%.** The next most common routes were via The Fund – 15% becoming aware via The Fund's website or email communications and 13% via direct discussions with staff.

Given that awareness of the Strength Checker was strongly related to the Resilient Heritage grant application process, it will be important for The Fund to give consideration to the promotion of the Strength Checker going forward now that the programme has closed. If the Strength Checker is to continue (it is understood that it will do so until 2021 at least), it will be important to ensure that it receives adequate levels of promotion and awareness-raising – either through the grant application processes or by other means.

On the process of using the Strength Checker, the most common response was 'neither easy nor difficult' (39%), followed by 'easy' (37%). Only 15% of organisations reported any level of difficulty with using the Strength Checker.

The survey asked organisations about the **usefulness of the Strength Checker, and the responses were strongly positive with more than three-quarters (76%) describing the results as useful** – 26% found the results very useful, with half (50%) reporting the results as quite useful.

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

Almost half (47%) of organisations report that they have made changes to how they operate due to using the Strength Checker. Whilst accounting for less than half of respondents, this is a notable increase on previous years. In 2018, 26% said they had made changes due to the Strength Checker, and this increased to 36% in 2019. In this context, 47% in 2020 shows the increasing influence of the Strength Checker in this regard.

More than eight out of ten respondents (86%) report that they would recommend the Strength Checker to other organisations – a strong, positive finding about the overall experiences of using the Strength Checker.

Reflecting on all these findings, it is clear that the scale of use, ease of use, level of usefulness, and the range of benefits and impacts emanating from the use of

the Resilient Heritage Strength Checker, **all point towards the Strength Checker being a useful tool that has resulted in benefits in terms of improving resilience for more than 60% of respondents and changes in how they operate for almost half of respondents.** Whilst there are some frustrations reported by a small proportion of respondents, these need to be seen in the context of the overall positive findings.

Impact of Resilient Heritage Grant Projects (Section 5)

Better Managed...

Amongst completed, or almost completed, projects **90% of organisations report they are better managed to a significant (46%) or moderate (44%) extent following their Resilient Heritage grant.**

For more recent awards (post October 2018), the pattern of response is similar, with an overwhelming **98.5% of respondents report that their organisation is already better managed (51.5%) or expect it to be so in the future (47%).**

Skills Development...

For completed, or almost completed, projects **87% of organisations report that their staff/trustees/board/volunteers have developed skills following their Resilient Heritage grant,** with 40% reporting that skills have been developed to a significant extent, and 47% to a moderate extent.

For more recent awards (post October 2018), **96% of respondents report that staff, trustees, board, or volunteers have already developed skills (48%) or expect them to do so in the future (48%) as a result of their Resilient Heritage grant.**

More Resilient...

Amongst completed/almost completed projects, **93% of organisations report that they are more resilient following their Resilient Heritage grant,** with 44% reporting that their organisation is more resilient to a significant extent and 49% to a moderate extent.

For more recent awards (post October 2018), **98% of respondents state that their organisation is already more resilient (43%), or that they expect it to be more resilient in the future (54%) as a result of their Resilient Heritage grant.**

When asked to score (out of 10) the **resilience of their organisation at the current time, the average score is 6.8** with a median score of 7 – and this compares to **pre-Resilient Heritage award levels of resilience with an average of 4.1** and a median of 4. Overall, this shows an increase in resilience across the cohort of respondents.

The **average change in resilience across all respondents is +2.9,** and the median change is +3 – clearly showing the increase in resilience reported by survey respondents.

In terms of the specific scale of change, **95% of organisations report a positive change in their resilience** (with 3% reporting to change, and 2% reporting a decrease).

Furthermore, **97% of respondents report that their Resilient Heritage award had a 'very' or 'moderate' positive impact on their organisation's resilience** – with almost two-thirds (65%) of organisations describing it as a very positive impact.

Conclusions and Recommendations (Section 6)

In conclusion, this report has found that there are **clear achievements by Resilient Heritage grantees in relation to all three outcomes** for the programme. For completed projects², 90% report their organisation is better managed, 87% report that their staff/trustees/board/volunteers have developed skills, and 93% report their organisation is more resilient.

In addition, the **evaluation findings about the Resilient Heritage Strength Checker are positive** – more than three-quarters (76%) of survey respondents report the results are useful, 61% report that using the Strength Checker provided benefits in terms of improving resilience, almost half (47%) have made changes to how they operate as a result, and more than eight out of ten respondents (86%) would recommend the Strength Checker to other organisations.

Going forward, The Fund could give further consideration to the following issues emerging from this evaluation:

Understandings of resilience

As noted in Section 3, when asked about what resilience means for their organisation, many survey responses were multi-faceted and captured a range of different aspects of the resilience outcome for The Fund. As such, it is the aspects that are not mentioned where further consideration could be given by The Fund:

- There is **practically no mention of 'withstanding threats'** in the survey responses, and whilst aspects around 'survival' do appear, only from a handful of respondents – far fewer than in previous surveys where survival was a common theme. This gap is perhaps particularly noteworthy in the current COVID-19 crisis.
- **'Fresh sources of expertise and advice' is hardly mentioned** in the responses, with 'advice' not appearing at all, and 'expertise' very infrequently. However, many organisations do recognise the importance of improving the skills of trustees, staff and volunteers – and as such are increasing their sources of expertise via these routes.
- Also **notable by its absence** (as highlighted in previous evaluation reports) is reference to **working in partnership to 'share services, staff and resources'**.

Going forward, if The Fund is keen for these aspects of resilience (and 'working in partnership to share services, staff and resources' in particular) to be further developed it may be that specific support or advice on how to develop/achieve this is needed by heritage organisations.

² Including those projects that were close to completion at the time of the research.

Future of the Resilient Heritage Strength Checker

It is important to recognise that awareness of the Strength Checker was strongly related to the Resilient Heritage grant application process. Going forward, it will be important for The Fund to give consideration to the promotion of the Strength Checker now that the programme has closed.

If the Strength Checker is to continue (it is understood that it will do so until 2021 at least), it will be important to ensure it receives adequate levels of promotion and awareness-raising – either through The Fund’s grant application processes or by other means.

Ongoing need for resources to support the sector around resilience

One final issue relates to the ongoing need for resources to support resilience for the heritage sector. It is acknowledged that The Fund intended to have a *capacity building and organisational resilience* campaign in 2020, although this has been affected by the current COVID-19 crisis. To support the ongoing resilience of the heritage sector, it will be important that heritage organisations can access funding for resilience-related activity. Whilst specific initiatives (e.g. the Business Support and Enterprise Development initiatives supported by The Fund³) will play an important role, there is also a need for resources to be available to support individual heritage organisations.

The range of issues outlined in Section 3 where heritage organisations were asked what type of changes they would expect to see if their organisation was to become more resilient in the future provides an indicative list of the areas around which future resilience-related support could be offered.

When considering these issues, it is important to note that many (if not all) of them were able to be supported through the Resilient Heritage programme. Given the success of the programme for grantees (see Section 5) it is not a failing of the programme that these issues remain – it is a reflection that there is, and will continue to be, an ongoing need for activities and projects on these issues.

Resilience is not a static state that an organisation reaches or acquires and thereafter remains – **becoming and remaining resilient is an ongoing process** that requires an organisation to be constantly adjusting and evolving.

Whilst the aspiration for the heritage sector is that organisations **become self-resilient** and are able to strengthen and maintain their resilience without the need for external support from The Fund (or other funders), for many heritage organisations this is not yet the position they find themselves in.

As noted in this report, organisations that were unsuccessful with their Resilient Heritage grant application commonly looked to the Fund for other support. In addition, a number of those organisations that were successful, looked to The Fund to provide support for their next stage of development.

All of this emphasises the importance of the role of The Fund in supporting the resilience of the heritage sector. As reflected in this report, the role of The Fund in supporting this type of activity is key, as it otherwise does not occur at all, or takes place at a reduced scale.

³ <https://www.heritagefund.org.uk/publications/business-support-and-enterprise-development-grants>; <https://www.heritagefund.org.uk/funding/enterprise-development-funding>; <https://www.heritagefund.org.uk/funding/business-support-funding>

1. INTRODUCTION

- 1.1 The National Lottery Heritage Fund (The Fund) commissioned DC Research Ltd to carry out the Resilient Heritage Programme Evaluation. The evaluation commenced in early 2018 and concluded in 2020.
- 1.2 This document is the Final Report for the evaluation. The primary research phase that underpins this report was carried out between the end of 2019 and March 2020⁴ - although this report also draws, where relevant, on the findings from the previous evaluation reports produced in 2018 (First Interim Report – June 2018) and 2019 (Second Interim Report – March 2019)⁵.

Aims of Resilient Heritage

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

⁴ Therefore, the research carried out for this evaluation report pre-dates (and therefore does not consider) the impact of the current COVID-19 pandemic on heritage organisations that have been engaged in the Resilient Heritage programme.

⁵ The previous reports are available via:

<https://www.heritagefund.org.uk/publications/resilient-heritage-programme-evaluation>

(<https://www.resilientheritagechecker.org.uk/>). According to the website, *“The Resilient Heritage Strength Checker is a diagnostic tool designed for voluntary and community sector organisations and social enterprises based in the UK that either have, or are looking to take on, responsibility for heritage.”*

Aims of the Evaluation

- 1.8 According to the Evaluation Brief, the aim of the evaluation is to assess the impact of Resilient Heritage funding on increasing grantees’ capacity, capability and overall resilience.
- 1.9 The remit of the evaluation states that the research should address a range of key questions. The full list of questions is included in Annex 1 to this report. Overall, *“the evaluation should seek to understand if grantees have increased organisational resilience, increased capacity or achieved significant strategic change, and the extent to which the programme outcomes have been achieved.”*

Structure of Report

- 1.10 The structure of this Final Report is as follows:
- The remainder of **Section 1** provides an overview of the key method tasks used for this Final Report.
 - **Section 2** provides an **overview of the scale of engagement** with The Fund’s Resilient Heritage programme.
 - **Section 3** summarises **perspectives on resilience** from survey respondents.
 - **Section 4** looks at the **Resilient Heritage Strength Checker** – in terms of awareness, use, benefits and impacts to heritage organisations from using the Strength Checker.
 - **Section 5** summarises the findings around the **impacts** for projects that have been awarded **Resilient Heritage grants**.
 - **Section 6** reflects on the findings from the evaluation and presents some conclusions and recommendations.
 - **Annex 1** sets out the main questions that the evaluation is due to address over the lifetime of the evaluation.
 - **Annex 2** presents the results from the **Resilient Heritage Survey 2020** – i.e. the survey that was sent to those organisations that either applied for a Resilient Heritage grant and/or used the Resilient Heritage Strength Checker between October 2018 and the end of the programme.
 - **Annex 3** presents the results from the **Resilient Heritage Evaluation - Survey of Projects** – i.e. the survey sent to those organisations that successfully applied for a Resilient Heritage grant and who were awarded their grant prior to October 2018.
 - **Annex 4** presents the case studies carried out as part of this Final Report stage of the evaluation, as well as listing all case studies that have been featured in the various evaluation reports.

Overview of Key Method Tasks for Final Report

1.11 The key method tasks carried out for this Final Report included:

- **Desk Based Research and Analysis** – this involved a range of tasks that assessed the overall scale of activity and awards for the Resilient Heritage programme. This included analysing a range of data provided by The Fund about the applications and awards for the programme as well the use of the Resilient Heritage Strength Checker.
- **Resilient Heritage Survey 2020** – in early 2020 a survey was carried out that invited responses from any heritage organisations involved in the Resilient Heritage programme between November 2018 and the end of the programme⁶. This included both users of the Strength Checker and/or applicants to the Resilient Heritage grant programme during this period. Survey invites were sent by email to a total of 321 different individuals from heritage organisations based on information provided by The Fund. A total of **128 valid responses** were received, and once the small number of bounce-back/failure emails are discounted (i.e. 21), this represents a **response rate of 43%** (128 valid replies out of 300).
- **Comparison of Survey Findings** – given that the same survey was used in the First Interim and Second Interim Reports as well as this Final Report, the results from these surveys were compared to see if there were any notable similarities or variances in the findings from the three different cohorts of organisations that engaged in these surveys (in 2018, 2019 and 2020). The results from this are presented where relevant throughout Sections 3, 4 and 5 of this report.
- **Resilient Heritage Survey of Projects** – in parallel with the Resilient Heritage Survey 2020, a survey of organisations that had been awarded Resilient Heritage grants prior to November 2018 was carried out. Survey invites were sent by email to a total of 269 different heritage organisations based on information provided by The Fund. A total of **136 valid responses** were received, and once the small number of bounce-back/failure emails are discounted (i.e. 25), this represents a **response rate of 56%** (136 valid replies out of 244).
- In terms of the characteristics of the survey respondents for both surveys (Resilient Heritage Survey 2020 and Resilient Heritage Survey of Projects) the relevant tables in Annexes 2 and 3 provide an indication of this in terms of heritage area (Table A2.1 and A3.1) and geography (Table A2.2 and A3.2) – showing that respondents represent a range of heritage areas across all regions/nations of the UK.
- **Resilient Heritage grantee Case Studies** – A range of projects were selected to be case studies for this Final Report. These projects were drawn from the completed projects and were selected based on positive responses in terms of impacts in their responses to previous surveys for this evaluation. They were selected to provide a mix of project types in

⁶ Those involved from the start of the programme to the end of October 2018 were surveyed as part of the First or Second Interim Reports.

terms of location; heritage area; and size of grant awarded. **A total of eight case studies were completed** and the list of case studies and the case studies themselves are included in Annex 4 to this report. The findings from the cases are also integrated into the main reporting sections where appropriate.

- **Stakeholder consultations** – a small number of stakeholder consultations also took place as the evaluation drew to a close (i.e. March 2020). Whilst the original plan had been to complete around 6 to 8 such consultations, the impact of the COVID-19 pandemic at the time (March 2020) resulted in only three consultations being carried out – with representatives from The National Lottery Heritage Fund, Creative United, and Locality.

2. ENGAGEMENT WITH THE RESILIENT HERITAGE PROGRAMME

This section looks at the scale of engagement with the Resilient Heritage programme – both the grant programme and the Resilient Heritage Strength Checker.

It primarily draws on data from The National Lottery Heritage Fund but also uses the results from the Resilient Heritage Survey 2020 and its equivalent predecessor surveys from the previous Interim Reports for this evaluation to consider aspects around application and reporting processes.

Applications for Resilient Heritage Grants

- 2.1 Data provided by The Fund (which covers the period from the start of Resilient Heritage until the programme closed in March 2019) can be used to assess the scale of engagement with Resilient Heritage in various ways. Data was provided about applications for Resilient Heritage grants⁷ and registered users of the Resilient Heritage Strength Checker, and the findings from these data are presented below.
- 2.2 In terms of the **number of applications for Resilient Heritage grants, this totalled 672 applications by the end of the programme.**
- 2.3 Of this total, **56% were successful** (identified as either ‘approved’ or ‘completed’ in Table 2.1); and **41% were unsuccessful** (‘rejected’ in Table 2.1), with the remaining 3% categorised in other ways (‘withdrawn’, ‘live’ etc.).

⁷ Note: Two projects that were included in the original list of applications provided by The Fund and were marked as ‘approved’ but that did not feature on the data set of the final list of 377 grantee projects used later in this section were removed from the list of applications (reducing it from 674 to 672) to ensure that the resulting analysis from each data set was consistent with the other.

Table 2.1: Applications for Resilient Heritage grants

Project Status	Percent	Number of Applications
Approved	47%	318
Complete	9%	59
Live	1%	5
Rejected	41%	276
Withdrawn post-decision	0%	1
Withdrawn pre-decision	2%	13
Total	100%	672

Source: DC Research, analysis of The Fund's Resilient Heritage Data

2.4 Table 2.2 presents the success rate by region/nation – showing that applications from Northern Ireland (79%), East Midlands (72%), and Wales (71%), have the highest success rates. Conversely, West Midlands (48%), Scotland (51%), and the North West (52%), have the lowest success rates.

Table 2.2: Summary of Success Rates for Resilient Heritage grant applications – by region/nation

Nation/region	Approved/Completed	Rejected	Number of Applications
East Midlands	72%	28%	68
East of England	60%	40%	25
London	55%	45%	64
North East	57%	43%	47
North West	52%	48%	91
Northern Ireland	79%	21%	19
Scotland	51%	49%	69
South East	59%	41%	68
South West	55%	45%	53
Wales	71%	29%	31
West Midlands	48%	52%	56
Yorkshire and The Humber	58%	42%	62
Total	58%	42%	653

Source: DC Research, analysis of The Fund's Resilient Heritage Data. **Note:** this excludes the 19 'live' or 'withdrawn' applications included in Table 2.1.

2.5 Looking at success rates for grant applications by type of heritage, Table 2.3 shows that Museums libraries archives and collections has the highest success rate (63%), followed by Historic buildings and monuments (61%) – whilst Intangible heritage (33%) and Non-heritage (38%) have the lowest success rates, and alongside Community heritage (42%) are the only heritage types to have a less than 50% success rate.

Table 2.3: Summary of Success Rates for Resilient Heritage grant applications – by type of heritage

Type of heritage	Approved/Completed	Rejected	Number of Applications
Community heritage	42%	58%	55
Historic buildings and monuments	61%	39%	289
Industrial maritime and transport	57%	43%	47
Intangible heritage	33%	67%	9
Land and biodiversity	54%	46%	120
Museums libraries archives and collections	63%	37%	125
Non-heritage	38%	63%	8
Total	58%	42%	653

Source: DC Research, analysis of The Fund's Resilient Heritage Data. **Note:** this excludes the 19 'live' or 'withdrawn' applications included in Table 2.1.

Summary of Resilient Heritage Grants Awarded

2.6 It can be derived from Table 2.1 that Resilient Heritage awards were made to a total of **377 projects**. These awards were for a **total value of £22,192,300**, with the awards **ranging in size from £4,000 to £250,000** – the average size of award was £58,866.

2.7 Table 2.4 shows the geographic breakdown of awards – showing the number and value of awards (in absolute value and as a percentage of the total awards).

Table 2.4: Summary of Resilient Heritage grants – by region/nation

Nation/region	Number of awards	Percent of awards	Value of awards	Percent of value
East Midlands	49	13%	£2,215,000	10%
East of England	15	4%	£1,162,800	5%
London	35	9%	£2,675,300	12%
North East	27	7%	£1,771,800	8%
North West	47	12%	£2,467,300	11%
Northern Ireland	15	4%	£873,500	4%
Scotland	35	9%	£1,099,800	5%
South East	40	11%	£2,204,600	10%
South West	29	8%	£1,426,900	6%
Wales	22	6%	£1,736,900	8%
West Midlands	27	7%	£1,670,800	8%
Yorkshire and The Humber	36	10%	£2,887,600	13%
Total	377	100%	£22,192,300	100%

Source: DC Research, analysis of The Fund's Resilient Heritage Data. **Note:** this excludes the 19 'live' or 'withdrawn' applications included in Table 2.1.

2.8 This shows that the largest **number of awards** were made to organisations in the East Midlands (13% of awards), followed by the North West (12% of

awards). Wales received the smallest number of awards (6%) closely followed by the West Midlands (7%) and the North East (7%).

- 2.9 In terms of **value of awards**, Yorkshire received the highest proportion of total funding (13%) followed by London (12%) and the North West (11%). Northern Ireland received the lowest value of funding (4%) followed by the East of England (5%) and Scotland (5%).
- 2.10 In terms of the breakdown by type of heritage, Table 2.5 overleaf shows this breakdown for both number and value of awards.
- 2.11 The table shows that 'Historic buildings and monuments' received the greatest **number of awards** (47% of all awards), followed by 'Museums libraries archives and collections' (21%) and 'Land and biodiversity' (17%).
- 2.12 This pattern is repeated in terms of **value of awards**, with 'Historic buildings and monuments' receiving 47% of the total value of awards, followed by 'Museums libraries archives and collections' (23%) and 'Land and biodiversity' (17%).

Table 2.5: Summary of Resilient Heritage grants – by type of heritage

Type of heritage	Number of awards	Percent of awards	Value of awards	Percent of value
Community heritage	21	6%	£1,114,100	5%
Historic buildings and monuments	177	47%	£10,332,200	47%
Industrial maritime and transport	28	7%	£1,307,100	6%
Intangible heritage	3	1%	£357,400	2%
Land and biodiversity	65	17%	£3,697,700	17%
Museums libraries archives and collections	80	21%	£5,114,400	23%
Non-heritage	3	1%	£269,400	1%
Total	377	100%	£22,192,300	100%

Source: DC Research, analysis of The Fund's Resilient Heritage Data. **Note:** this excludes the 19 'live' or 'withdrawn' applications included in Table 2.1.

Resilient Heritage Strength Checker

- 2.13 Turning to the **number of registered users of the Strength Checker, to the end of November 2019, there were a total of 1,165 registered users.**
- 2.14 The regional breakdown of these users is presented in Table 2.6 below – and shows that the regions/nations with the largest proportion of users are Scotland (11% of users are from Scotland) and London (11%), followed by the North West and South West (both at 10%).

2.15 Excluding England-wide, the regions/nations with the smallest proportion of users are Northern Ireland (2% of users are from Northern Ireland), and Wales (4%).

Table 2.6: Registered Users of the Resilient Heritage Strength Checker – by primary region or country of service delivery

Nation/region	Percent	Number of Registered Users
London	11%	98
Scotland	11%	103
North West	10%	97
South West	10%	96
South East	9%	88
West Midlands	9%	79
Yorkshire and the Humber	8%	75
East Midlands	7%	61
East of England	6%	53
UK Wide	6%	54
North East	5%	48
Wales	4%	37
England Wide	2%	16
Northern Ireland	2%	23
Total	100%	928

Source: DC Research, analysis of data from The Fund Resilient Heritage Data (to end November 2019) – a total of 237 users where no regional data is provided have been excluded from this analysis.

2.16 Part of the process of the Strength Checker includes asking users if they are looking to apply for a Resilient Heritage grant (all 1,165 users - i.e. 100% - said that this was the case), and if so, how much they intend to apply for. Table 2.7 summarises the responses and shows that most Strength Checker users intended to apply for a grant of between £50,000 and £100,000 (30%) followed by grants of between £10,000 and £50,000 (27%).

Table 2.7: Value of Resilient Heritage grant registered users of the Resilient Heritage Strength Checker intended to apply for

Amount	Percent	Number of Registered Users
Under £10,000	19%	165
£10,000 to £50,000	27%	243
£50,000 to £100,000	30%	269
£100,000 to £250,000	24%	209
Total	100%	886

Source: DC Research, analysis of The Fund's Resilient Heritage Data (to end November 2019) – a total of 279 users that did not specify a level of grant have been excluded from this analysis.

Overview of Resilient Heritage Grant Applications Processes

- 2.17 The results below are based on the Resilient Heritage Survey 2020 (see Annex 2) and include comparison to previous surveys where relevant.
- 2.18 Table A2.13 in Annex 2 shows that the **vast majority (81%) of organisations that responded to the survey had submitted an application for a Resilient Heritage grant**. This is higher than the previous surveys (61% in 2018 and 70% in 2019), showing the proportion of respondents that engaged with the Resilient Heritage programme *only* through the Strength Checker (i.e. they did not submit a grant application) decreased over time from 39% (2018) to 30% (2019) and to 19% (2020).
- 2.19 This decrease in the proportion of survey respondents only engaging in the programme through the Strength Checker may reflect an increase in the number of grant applications as the programme drew to a close in early 2019.
- 2.20 In terms of the **grant application process, the majority of respondents (69%) found the process very or fairly easy/straightforward** – with 10% describing it as very easy/straightforward, and the other 59% describing it as fairly easy/straightforward – see Table A2.15 in Annex 2. These results also show that **almost one-third of respondents (31%) found the grant application process fairly or very difficult**.
- 2.21 Whilst these results are clearly positive in terms of how straightforward applicants found the process, it does show a decrease over time from 78% in 2018, to 77% in 2019 to 69% in 2020 – with a respective increase in the proportion of respondents describing it is fairly or very difficult (from 23% in both 2018 and 2019 to 31% in 2020).
- 2.22 For those applicants that reported they had used the progress reporting and claims/payment processes (see Table A2.16), **the overwhelming majority (85%) described the progress reporting and claims/payment processes as straightforward⁸**.
- 2.23 These results are slightly lower than previous surveys (91% in 2018 and 94% in 2019) but still clearly show positive feedback from survey respondents in terms of the Resilient Heritage progress reporting and claims/payment processes.
- 2.24 It should be noted that whilst these results show a change over time in the proportion of respondents reporting particular feedback, this may reflect a change in the type(s)/characteristic(s) of applicant as much as any change in the application or reporting processes. Additionally, as noted above, the decrease in the proportion of survey respondents only engaging in the programme through the Strength Checker may reflect an increase in the

⁸ These results are echoed in the Resilient Heritage Survey of Projects, where 90% of respondents found the progress reporting and claims/payment processes 'very' or 'fairly' easy/straightforward (Table A3.4).

number of grant applications as the programme drew to a close in early 2019.

- 2.25 The **vast majority of organisations (87%) responding to the survey reported that they did make use of the Strength Checker in the development of their grant application** – see Table A2.17 in Annex 2.
- 2.26 For those organisations that did not make use of the Strength Checker, the reasons offered are consistent with the explanations (see Section 4) about not using the Strength Checker generally – i.e. the Strength Checker not being appropriate or relevant to the organisation (or the specific project for which funding was being sought).

3. HERITAGE ORGANISATIONS PERSPECTIVES ON 'RESILIENCE'

This section looks at perspectives on resilience for those that responded to the recent survey(s) for this evaluation and placing these perspectives in the context of The Fund's outcome around resilience. It also presents the survey findings on how resilient organisations report that they are, any patterns to this by organisation characteristics, as well as considering changes to organisation's resilience in recent years.

Whilst this section primarily draws on the findings from the **Resilient Heritage Survey 2020** – i.e. the survey of organisations that applied for a Resilient Heritage grant and/or used the Strength Checker between October 2018 and the end of the programme (see Annex 2), it also draws on the findings from the surveys carried out for the previous evaluation reports to allow some comparisons to be made.

- 3.1 The National Lottery Heritage Fund provides an explanation about what The Fund's investment should lead to in terms of resilience within the context of The Fund's Outcomes, where outcome 7 is about resilience:

The funded organisation will be more resilient

What this outcome means

If your project is a success, your organisation will have greater capacity to withstand threats and to adapt to changing circumstances to give you a secure future.

You will achieve this through stronger governance and greater local involvement in your organisation, increased management and staff skills, fresh sources of expertise and advice, and working in partnership to share services, staff and resources.

What we are looking for

You might have new volunteers who increase your capacity and skills, or new sources of income through commercial activity, endowments or fundraising programmes.

You will be able to show that your organisation is stronger and in a better position for the future as a result of the changes you made as part of your project.

Source: <https://www.heritagefund.org.uk/funding/outcomes#outcome-7>, accessed 8th April 2020

- 3.2 Whilst it should be noted that this current outcome definition was set out after the Resilient Heritage programme, it is very similar to the previous outcome used whilst the Resilient Heritage programme was live, which explained that a more resilient funded organisation would: *"...have greater capacity to withstand threats and to adapt to changing circumstances to give you a secure future. You will achieve this greater resilience through stronger governance and greater local involvement in your organisation;*

increased management and staff skills; fresh sources of expertise and advice; and working in partnership to share services, staff and resources.”⁹

Heritage Organisations’ Understandings of Resilience

- 3.3 Heritage organisations that responded to the Resilient Heritage Survey 2020 were asked to explain what resilience means for their own organisation, and the responses can be considered relative to the above explanation¹⁰.
- 3.4 It should be noted that many of the responses are multi-faceted and capture a range of different aspects of the outcome which should be acknowledged when considering the summary below. As such, it may be that it is the aspects of the outcome that are not mentioned by respondents where further consideration could be given by The Fund.
- 3.5 Issues around **sustainability** are very common (the most often mentioned phrases relate to sustainability) – in particular, **financial sustainability** and also being able to **sustain the activities/services** of the organisation – clearly linking to the ‘secure future’ element of the outcome.
- 3.6 There is also a common theme in the responses around resilience being about the ability to **‘adapt to changing circumstances’**, and for many organisations that mention this aspect it relates to having **sufficient capacity** to be able to do so. Respondents commonly highlight the need to **increase capacity** as a key aspect of being (more) resilient.
- 3.7 **Community** is another common theme – and this covers aspects such as providing a service to the community or meeting the needs of the community, as well as engaging with, and working with, the community. This shows that organisations recognise the importance of the ‘greater local involvement’ aspect of the outcome.
- 3.8 Income is a common theme – both **income generation** (to cover operating costs) and the importance of **diversification of income** to help increase the resilience of the organisation.
- 3.9 Skills (relating to the ‘increased management and staff skills’ aspect of the outcome) emerges as a common theme, with categories of response including reference to **improving the skills of both trustees and staff**.
- 3.10 **Governance** is commonly mentioned in the responses, usually within the context of ensuring that the organisation has **‘good governance’** or **‘effective governance’**. For some organisations this has involved reviews and changes to governance arrangements to help improve resilience.
- 3.11 **Volunteers** also feature as a common strand within the responses – with mention of the reliance on volunteers (and the need to address any over-reliance on a small number of volunteers to improve resilience), as well as

⁹ Source: <https://www.heritagefund.org.uk/publications/outcomes-detail#heading-7>, accessed February 2019

¹⁰ Each of the themes listed here are mentioned by at least 10% of respondents to this question – so these themes reflect the most common types/categories of response.

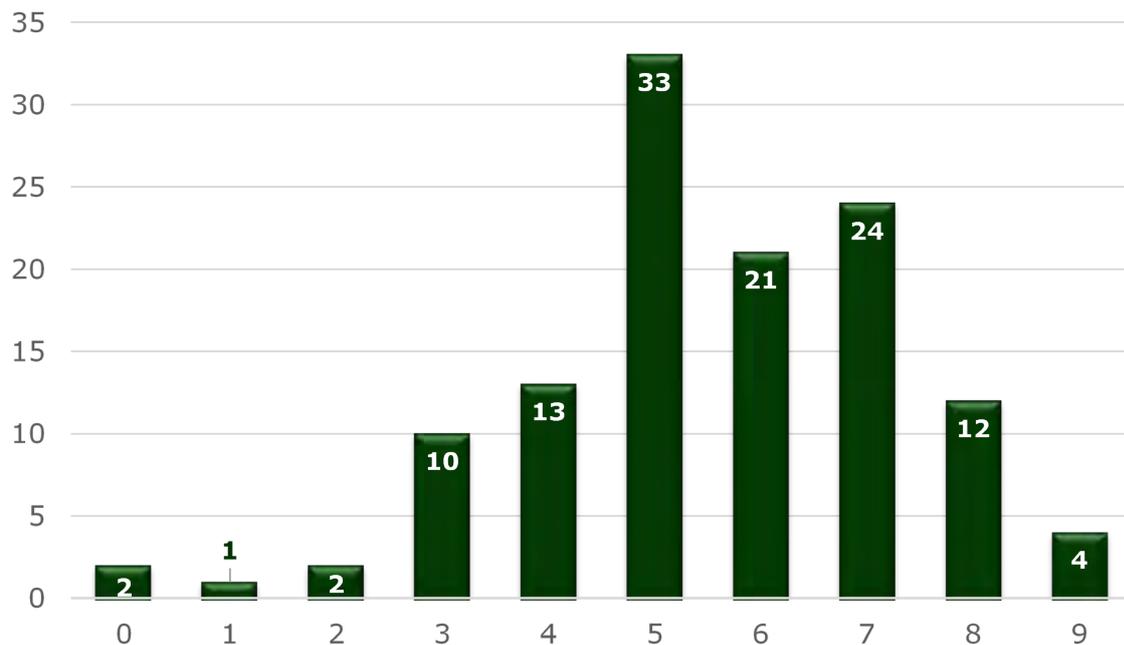
ensuring that volunteers have the appropriate skills and that the organisation is able to recruit sufficient volunteers to ensure capacity is maintained/increased.

- 3.12 In terms of gaps in the responses, relative to The Fund's definition of the outcome, there is **practically no mention of 'withstanding threats'** in the responses, and whilst aspects around 'survival' do appear, it is mentioned by only a handful of respondents – far fewer than in the previous surveys in 2018 and 2019 where survival was a common theme.
- 3.13 **'Fresh sources of expertise and advice' is hardly mentioned** in the responses, with 'advice' not appearing at all, and 'expertise' very infrequently – although many organisations do (as noted above) recognise the importance of improving the skills of trustees, staff and volunteers – and as such are increasing their sources of expertise via these routes.
- 3.14 Also (as highlighted in previous evaluation reports) **notable by its absence** is that there is **no mention of working in partnership to 'share services, staff and resources'** – neither 'sharing' nor 'share' appear in any responses, and 'partnership' only appears in relation to responses from individual partnerships – the concept of 'working in partnership' is not explicitly mentioned by any respondent.
- 3.15 If The Fund is keen for these aspects of resilience (and 'working in partnership to share services, staff and resources' in particular) to be further developed it may be that specific support or advice on how to develop/achieve this is required. There is a broader literature and previous research on models of partnership working (including in the culture/heritage context), which highlights that this type of partnership working (sharing staff/resources) is one of the most challenging aspects of partnership working for organisations.

Levels of Resilience Amongst Heritage Organisations

- 3.16 The heritage organisations that responded to the Resilient Heritage Survey 2020 were asked to score their organisation's current level of resilience (out of 10, where 0=low and 10=high), and Figure 3.1 below summarises the findings, showing that the average score across all respondents was 5.6 (with a median of 5.5), with responses ranging from 0 through to 9.
- 3.17 It is worth noting that the overall scores around resilience are higher in this report than the same measures were in the Second Interim Report, and are closer to those reported in the First Interim Report (e.g. overall average of 5.6 in this report (early 2020) compared to 5.0 for the Second Interim Report (March 2019) and 5.64 for the First Interim Report (June 2018).

Figure 3.1: How resilient would you say your organisation is at the current time (0 = low, 10 = high)



Source: DC Research, Resilient Heritage Survey 2020, n=122

3.18 These scores were also analysed against other applicant characteristics to look for any patterns – e.g. by region; engagement with the Resilient Heritage programme (i.e. awareness/use of the Resilient Heritage Strength Checker; submitting a grant application; success with grant application); and any change(s) in resilience. The results of analysis by such characteristics are presented in Annex 2 (Tables A2.22 to A2.27), however, given the small numbers of respondents in some categories it is not appropriate to draw any strong conclusions from these analyses.

3.19 Organisations responding to the survey were asked to explain why they gave their organisation that score, and a number of common themes emerged, when the results were assessed in relation to the scores given.

3.20 For those reporting high scores (8 or more) some of the common themes were around the following – which resonates with the understandings of resilience outlined earlier in this section:

- The **strong governance** arrangements, **quality of trustees, alongside an appropriate organisational culture.**
- **Security of income, good financial management, good level of reserves** – alongside/underpinned by a sustainable operating model.
- **Avoiding (over)reliance** on any individual donors or sources of income and **ensuring good diversity of income.**
- **Keeping focus on the key aims** of the organisation, having a **robust plan**, and ensuring **good succession planning** is in place.
- Strong **volunteer base** and good **volunteer recruitment** processes.

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

- Most commonly (by far), the **lack of funding** (especially any secured or ongoing funding) as well as **recently losing main sources of income** underpinned low scores.
- Other organisations (including those that scored themselves as a 3) also highlighted **governance issues** and a **lack of capacity** (including **over-reliance on a few individuals – staff and/or volunteers**) as the main factors underpinning their low score.
- Some organisations are currently going through **wider transitions and developments** which results in their current low score which they anticipate will improve going forward.

3.22 The survey also asked organisations whether the level of resilience in their organisation had changed in recent years and, as Table 3.1 below shows, **three-quarters of respondents’ report that it has changed.**

Table 3.1: Has the level of resilience of your organisation changed in recent years?

Answer	Percent	Number
Yes	74%	90
No	18%	22
Don't Know	7%	9

Source: DC Research, Resilient Heritage Survey 2020, n=121

3.23 For those that reported a change, the organisations were asked what type of change has occurred and the results are included in Figure 3.2.

3.24 **More than three-quarters (78%) of respondents stated a positive change in their organisation’s resilience**, with almost one-fifth (17%) reporting that their organisation has become ‘much more resilient’ in recent years and the remainder (61%) reporting they are ‘more resilient’.

3.25 Conversely, just over one-fifth (22%) stated that their organisation has become less resilient in recent years, with almost all of these respondents describing themselves as ‘less resilient’ (only one reply stated they have become ‘much less resilient’ in recent years). Respondents that report having become less resilient in recent years typically face similar issues to what was highlighted above for those with low overall scores – i.e. **lack of funding**, (e.g. insecure financial position, loss of funding sources, reliance on (dwindling) membership for income) and **issues around capacity** (e.g. lack of staff; understaffed; reliance on small number of volunteers, etc.).

Figure 3.2: Change in level of resilience in recent years



Source: DC Research, Resilient Heritage Survey 2020, n=94

- 3.26 Overall, this is a generally positive picture in terms of increasing resilience, however, more than one-fifth report a worsening position¹¹. In addition, it should be noted that the organisations responding to the survey are those engaged in some way with resilience through either registering/using the Strength Checker and/or applying for a Resilient Heritage grant, and as such, it could be anticipated that many would already have taken steps to, or would be currently taking steps to, increase their own resilience.
- 3.27 In terms of increasing resilience, organisations were asked what type of changes they would expect to see if their organisation was to become more resilient in the future. It is interesting to note that the **responses provided for this survey are very similar indeed to those reported in the previous evaluation reports** – indicating that these aspects are **long-standing and systemic issues** across the heritage sector.
- 3.28 As such, it may be that the issues outlined overleaf could form the basis of future resilience-related support and resources from The Fund. A number of these issues were priorities for the Resilient Heritage programme showing that such needs continue beyond the lifetime of the programme. In addition, a number of the issues highlighted will form part of the offer from the Business Support and Enterprise Development initiatives supported by

¹¹ Analysis of the survey results reveals no particular pattern in terms of organisation size (the pattern for smaller organisations (i.e. less than 5 staff) is the same as for other organisations). Geographically, respondents from Yorkshire seem to be more likely to report a decrease in resilience compared to other areas, but the sample size is small and therefore insufficient to draw any firm conclusions.

The Fund¹² and could be addressed via these routes. The most common issues were:

- **Income and funding** – with increasing core funding and self-generated income getting particular mention. A common theme emerged around taking positive steps to diversify income sources, thereby reducing reliance on a small number of funding sources. **Increasing the financial reserves** of the organisation was also often mentioned.
- Developing more of a **focus on income generation and fundraising**, including developing and implementing fundraising strategies and business plans as well as having the **capacity to dedicate to fundraising**.
- Changes and improvements to **trustees and governance arrangements** – increasingly around attracting ‘professional’ trustees with relevant skills, knowledge, experience, and capacity. In some cases, restructuring or improving current governance arrangements was highlighted.
- **Increased organisational capacity and capability** – especially recruiting more staff and, in particular, skilled and experienced staff. **Increasing volunteer capacity** was also mentioned by some as a route to addressing capacity and thereby helping to improve resilience.
- **Across trustees, staff and volunteers, increasing skills through training was identified as a route to increasing resilience.**
- **Audience development, diversification of audiences, and increasing and diversifying membership** (where relevant) and boosting the wider support base for the organisation – including enhancing the profile of the organisation with audiences, key stakeholders, and potential funders.
- Introducing, or **improving the strategies/plans as well as the supporting systems and processes** to make the organisation more effective and better managed.

3.29 One notable addition to the issues from previous reports is around **working in partnership** – with a small number of organisations (around 6% of respondents) reflecting that one route to increasing their resilience is to develop more partnerships and increase collaboration.

3.30 This is of particular interest in the context of the findings from the start of this section, where no respondent mentioned ‘working in partnership’ in their explanation about what resilience meant to their organisation. This new finding may reflect that some organisations do appreciate that working in partnership may be a route to increasing their resilience and is something that The Fund could give further consideration to, as explained earlier in this section.

¹² <https://www.heritagefund.org.uk/publications/business-support-and-enterprise-development-grants>; <https://www.heritagefund.org.uk/funding/enterprise-development-funding>; <https://www.heritagefund.org.uk/funding/business-support-funding>

4. RESILIENT HERITAGE STRENGTH CHECKER

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

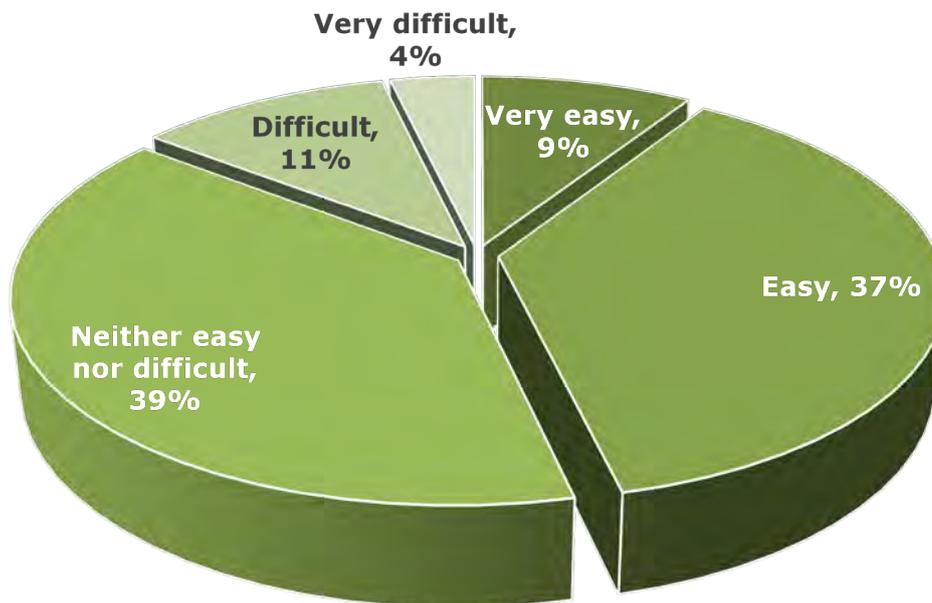
Whilst this section focuses strongly on the findings from the **Resilient Heritage Survey 2020** – i.e. the survey of organisations that applied for a Resilient Heritage grant and/or used the Strength Checker between October 2018 and the end of the programme (see Annex 2), it also draws on the findings from the surveys carried out for the previous evaluation reports to allow some comparisons to be made.

Awareness and Use of the Resilient Heritage Strength Checker

- 4.1 The survey results show that survey respondents have a high awareness of, and high levels of use of, the Resilient Heritage Strength Checker.
- 4.2 Table A2.5 in Annex 2 shows that the **vast majority (95%) of respondents are aware of the Resilient Heritage Strength Checker**, with the subsequent table (Table A2.7) showing that **more than nine out of ten respondents (93%) have made use of the Strength Checker**.
- 4.3 Taking these results together, the vast majority of respondents (88%) are aware of, and have made use of, the Strength Checker. 7% are aware of the Strength Checker but have not used it, and the remaining 5% report not being aware of (and therefore not using) the Strength Checker.
- 4.4 This level of awareness (95%) in 2020 is the same as the Second Interim Report Survey (2019) and slightly higher than the First Interim Report Survey (2018) which was 91%. This shows that awareness of the Strength Checker has remained very high throughout the evaluation and has increased slightly over time.
- 4.5 The small minority of organisations that are aware of, but have chosen not to use the Strength Checker, were asked to explain why they had not used it. All the reasons provided were about individual circumstances of the organisation – and as such, there is nothing that can be learned from this group of non-users in terms of the wider use of the Strength Checker.
- 4.6 The survey asked how organisations became aware of the Strength Checker, and Table A2.6 shows that the **most common route (by far) has been through the Resilient Heritage grant application process**, with 77% becoming aware via this route. This result is the same as the previous surveys in 2018 and 2019 which both showed the same route (through the Resilient Heritage grant application process) as the most common way in which respondents found out about the Strength Checker. The result is even higher in 2020 at 77% compared to 70% in both 2018 and 2019.

- 4.7 The next most common routes were via The Fund – with 15% becoming aware from The Fund’s website or email communications from The Fund, and 13% via direct discussions with The Fund’s staff.
- 4.8 Given that, according to the survey, awareness of the Strength Checker was strongly related to the Resilient Heritage grant application process, it will be important for The Fund to give consideration to the promotion of the Strength Checker going forward now that the programme has closed. If the Strength Checker is to continue (and it is understood that it will do so until 2021 at least), it will be important to ensure that it receives adequate levels of promotion and awareness-raising for relevant organisations – either through the grant application processes or by other means.
- 4.9 In terms of the process of using the Strength Checker, Figure 4.1 shows that the most common response ‘neither easy nor difficult’ (39%) followed by ‘easy’ (37%). 15% of organisations reported any level of difficulty with the process of using the Strength Checker, with 4% describing it as ‘very difficult’ and 11% as ‘difficult’. Overall, 85% report either ease with using, or no issues with using, the Strength Checker - 46% describing it as ‘easy’ or ‘very easy’ to use and 39% as ‘neither easy nor difficult’. These findings show that, for those that have used the Strength Checker, there are no major issues with the processes involved.

Figure 4.1: How easy or difficult did you find the process of using the Resilient Heritage Strength Checker?

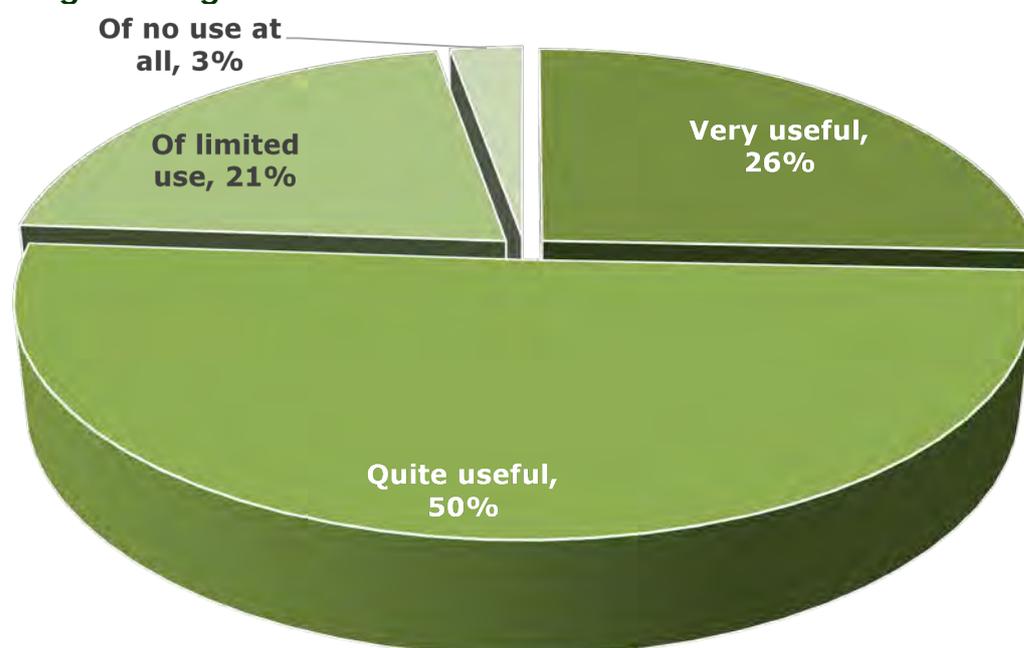


Source: DC Research, Resilient Heritage Survey 2020, n=110

- 4.10 These results are similar to those in 2018 and 2019 (where 54% and 50% respectively found it easy or very easy to use) albeit on a slight downward trend – from 54% in 2018, to 50% in 2019 to 46% in 2020. Similarly, whilst 12% reported that it difficult/very difficult to use in both 2018 and 2019 this has increased to 15% in 2020.

- 4.11 The survey asked organisations about the **usefulness of the results from the Strength Checker, and the results are strongly positive (Figure 4.2) with more than three-quarters (76%) describing the results as useful** – 26% found the results very useful, with half (50%) reporting the results as quite useful. One-fifth (21%) described the results as being of limited use, and 3% found the results to be of no use at all.
- 4.12 Whilst the results in terms of usefulness are clearly positive, almost one-quarter of respondents (24%) viewed the results as either of limited use, or of no use at all.
- 4.13 These results are very similar to the previous surveys with 77% describing the results from the Strength Checker as useful in 2018, 81% in 2019, and 76% in 2020.

Figure 4.2: How useful did you find the results from the Resilient Heritage Strength Checker?



Source: DC Research, Resilient Heritage Survey 2020, n=109

Benefits and Impacts of the Resilient Heritage Strength Checker

- 4.14 Those organisations that reported having used the Strength Checker were asked about the benefits and impacts from having done so.
- 4.15 In terms of the Strength Checker providing benefits to the organisation in terms of improving resilience, **the majority of respondents (61%) report that using the Strength Checker did provide benefits in terms of improving resilience** – see Table A2.10 in Annex 2.
- 4.16 These results are almost identical to the findings from the previous surveys, where 60% (2018) and 61% (2019) reported that the Strength Checker provided benefits in terms of improving resilience.

- 4.17 Organisations were asked what the main benefits of using the Strength Checker had been for them in terms of improving resilience. A number of common themes emerged in the responses.
- It helped to **'focus the minds'** – enabling organisations to spend time together considering the issues and **helped increased awareness** within the organisation **of the issues to be addressed**.
 - The Strength Checker **supported or reinforced the organisations' understandings of their current strengths and weaknesses**.
 - It also **highlighted the weaknesses and challenges** for organisations to address.
 - The Strength Checker provided an **independent source of evidence and review** about the issues to address for organisations.
 - For many, the Strength Checker contributed to the **development of their Resilient Heritage grant application (or highlighted the need for support)**.
- 4.18 For the 39% that stated there had been no benefits from using the Strength Checker in terms of improving resilience, the main reasons offered included:
- A common reflection was that the Strength Checker **had not told them anything that they did not already know** about their organisation (*"...largely confirmed what we suspected..."*).
 - A feeling for some that the Strength Checker was **not suitable to their type**¹³ of organisation **or to their size of organisation**.
 - A minority reported that **some of the questions were not relevant to their individual situation**, or that they **did not like particular aspects of the Strength Checker** (e.g. the 'subjective' nature of it, 'verbose' instructions and 'too much jargon', that it '...just underlined a weakness but did not offer any solutions' or that 'there are other more relevant/ accessible ways to work with trustees to help plan and reflect').
- 4.19 Organisations were asked whether they had made any changes to how they operate due to using the Strength Checker, and close to one-half (47%) of organisations report that they have made changes to how they operate – see Table A2.11. Whilst this does mean that the **majority of respondents (53%) have not made any changes to how they operate due to using the Strength Checker**, it is useful to consider the types of changes that have (or have not) been made.
- 4.20 The 47% of organisations reporting that they have made changes to how they operate due to using the Strength Checker, whilst less than half of all respondents, is a notable increase on previous years. In 2018 only 26%

¹³ There was no particular pattern to the small cohort of respondents that identified this as the reason for reporting no benefits of the Strength Checker. The cohort did include those that described themselves as *'campaigning'* organisations and *'collective'* organisations, as well as those *'undergoing transformation'*. As such, they are a minority of respondents and may well be organisations for whom the Strength Checker is not really suited/appropriate.

said they had made changes due to the Strength Checker, and this increased to 36% in 2019. In this context, the 47% reported here is a clear increase on previous years and shows the increasing influence of the Strength Checker in this regard.

- 4.21 **For this cohort of organisations (almost one-half of survey respondents), the Strength Checker has already led to, or contributed to, actual changes in the ways in which the organisations operate.**
- 4.22 The main aspects mentioned as changes that have already been made by organisations include:
- Recruiting and **appointing new staff** or **restructuring existing staffing structures and posts**.
 - Reviewing and changing **governance** arrangements to address the issues highlighted by the Strength Checker (as well as appointing new trustees and providing training for trustees).
 - Using the results to **support applications for Resilient Heritage grants**.
 - **Making changes to practices and procedures** within the organisation – including changes to financial systems and management.
 - **Develop new plans** and strategies and/or **review** mission statements, vision, and the **strategic direction of the organisation**.
 - Take steps to **diversify income** including through the **introduction of new revenue streams**.
 - **Recruited additional volunteers** to increase both capacity and capability and skills within the organisation.
 - Made changes to the way the organisation **engages with, and has dialogue with, the local community**.
 - **Addressing skills gaps through training** courses/programmes for staff and/or governing body and/or volunteers.
- 4.23 The most common response to the question for those that had not made any changes since using the Strength Checker, was an overall reflection that **it was either too soon** to have done so **or there is a lack of capacity** within the organisation to do so.
- 4.24 Others noted that to be able to make any of the changes would **require additional funding/resources**, and that they have not yet been able to do so due to a lack of such funding/resources as well as a **lack of staff time or capacity**, or that **other issues had taken priority** for the organisation instead.
- 4.25 Organisations were asked whether or not they would recommend the Strength Checker to other organisations, and **more than eight out of ten respondents (86%) report that they would recommend the Strength Checker** – which can be regarded as a strong, positive finding about the overall experiences of using the Strength Checker.

- 4.26 Reflecting on the findings presented in this section, it is clear that the scale of use, ease of use, level of usefulness, and the range of benefits and impacts emanating from the use of the Resilient Heritage Strength Checker by heritage organisations that responded to the survey, **all point towards the Strength Checker being a useful tool that has resulted in benefits in terms of improving resilience for more than 60% of respondents and changes in how they operate for almost half of respondents.** Whilst there are some frustrations reported by a small proportion of respondents, these need to be seen in the context of the overall positive findings presented in this section.

5. RESILIENT HERITAGE GRANTS – IMPACTS

This section focuses on those organisations that have been involved in the Resilient Heritage grant programme, and summarises the activities, impacts and achievements from the projects – focusing on the three outcomes for the Resilient Heritage programme - heritage will be **better managed**; people will have **developed skills**; and organisations will be **more resilient**.

It considers two cohorts of grantees. First, those organisations that received their grants prior to November 2018, and were typically expected to have completed their projects at the time of the surveys (early 2020). Second, those that received their grant awards from October 2018 until the programme closed in March 2019, and whose projects were typically still ongoing at the time of the surveys.

Resilient Heritage Projects – Activity

5.1 The Resilient Heritage Survey of Projects asked Resilient Heritage funded projects to summarise the main activities that were carried out as a result of their grant, and the main themes of activity are summarised below.

- As has been the case throughout the evaluation, **training and skills development** (including formal training) has been a key part of many of the projects and is the most often reported activity – this includes providing training to trustees, management, staff and volunteers across a range of activities. For those that specified the types of training, the most common areas have included: fundraising, income generation and finance management; implementing new systems and processes (e.g. CRM); marketing and communications; and branding, profile and advocacy.
- Alongside training, activities around **governance** have been a very common area of activity. This has included governance reviews, changes to governance arrangements, trustee skills audits, training for trustees, and recruitment of new trustees/board members – to generally increase capacity and to add specific skills/capabilities.
- **Various aspects of plan and strategy development** was the next most reported activity. This includes high-level, strategic planning, as well as business and organisational plans and masterplans. In addition, more specific plans and strategies include fundraising strategies, marketing plans, audience development plans, stakeholder/support engagement plans, asset management plans, and project plans.
- **Increasing staff capacity** – a range of projects used their funding to appoint staff at various levels of the organisation.
- **A range of volunteer development activities** also took place – including the recruitment of new volunteers, training for volunteers, and developing ways to more effectively engage volunteers in the organisation.
- **Reviews of various aspects of the organisation** - including organisation-wide reviews as well as reviews of specific aspects of working procedures, processes, systems, and structures (including staffing and governance structures) as well as management, IT,

marketing, the heritage offer, fundraising and income generation. This also included commissioning feasibility studies, options appraisals, etc.

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

5.2 The Resilient Heritage Survey 2020 also asked the same question of those that had successfully applied for a Resilient Heritage grant since November 2018, and the same themes emerged. Considering these results alongside the findings from the previous evaluation reports shows that the types of activities carried out by Resilient Heritage projects have been common throughout the evaluation.

5.3 The Resilient Heritage Survey 2020 asked organisations that were **not successful** in their grant application (see Table A2.18 in Annex 2 which shows that 30% reported being unsuccessful), what had happened to the project for which they had sought Resilient Heritage funding:

- Most commonly, organisations reported that, at the current time, the **project is on hold, or has stalled**, with the organisation not able to progress it at this time via any other routes.
- Others noted the **use of other funding/resources** – either the organisation's own funds, or from another funder – to take forward parts of the planned project – but with changes commonly having occurred in the scale or range of activity being reduced as a result of the application being unsuccessful.
- Other organisations reported that they have already successfully **resubmitted** (or plan to resubmit in the future) an application to The Fund, based on the feedback they received to their unsuccessful application.

5.4 In summary, very few projects have gone ahead as planned without the grant – showing the importance of the Resilient Heritage awards (or other awards from The Fund) in supporting this type of activity, as it either does not occur at all, or takes place at a reduced scale otherwise.

Impacts and Outcomes

5.5 As noted in Section 1, Resilient Heritage grants were expected to deliver the following outcomes:

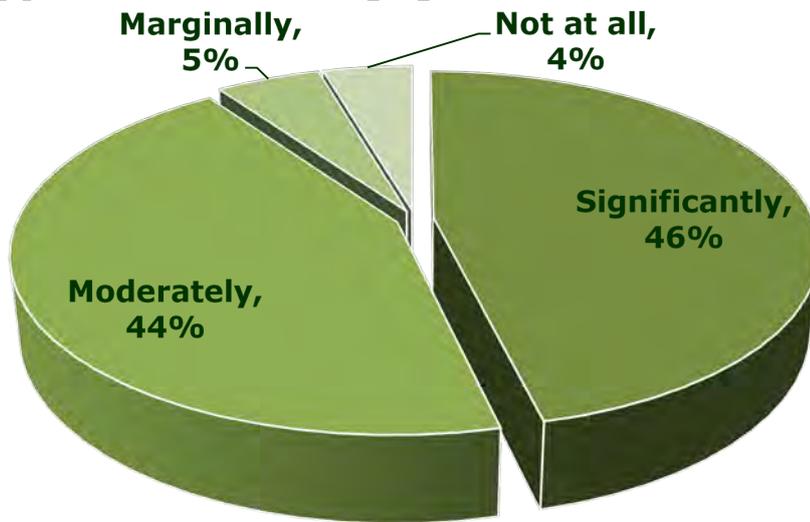
- Outcomes for heritage:
 - With our support, heritage will be **better managed**
- Outcomes for people:
 - With our support, people will have **developed skills**
- Outcomes for communities:
 - With our support: your organisation will be **more resilient**

5.6 Each of these outcomes are considered in turn in the remainder of this section, and achievements reported by survey respondents (to both the Resilient Heritage Survey 2020 and the Resilient Heritage Survey of Projects) as well as the case studies (the case studies are included in Annex 4) are presented.

Better Managed...

5.7 Amongst those projects that are completed, or almost complete, Figure 5.1 shows that **90% of organisations report their organisation better managed to a significant (46%) or moderate (44%) extent following their Resilient Heritage grant.** Only 4% of organisations report that their organisation is 'not at all' better managed following their Resilient Heritage grant.

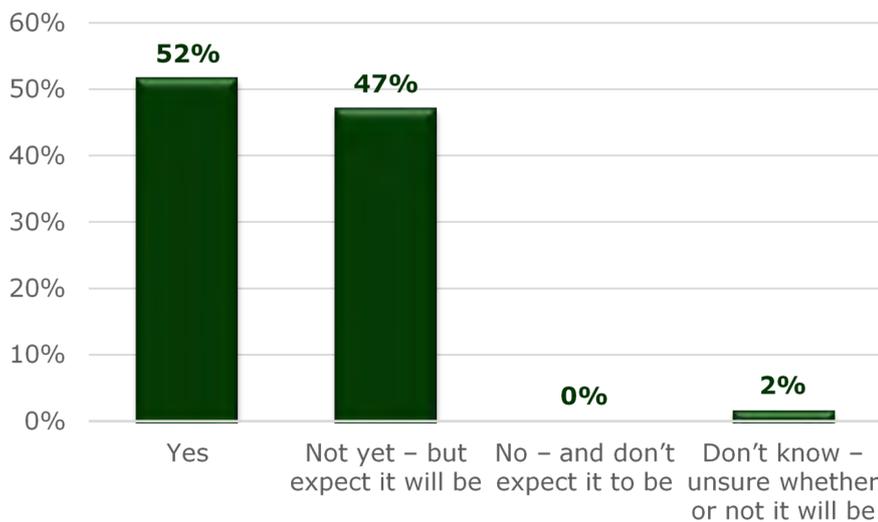
Figure 5.1: To what extent is your organisation now better managed following your Resilient Heritage grant?



Source: DC Research, Resilient Heritage Survey of Projects, n=134

5.8 For those more recent projects (post October 2018), the pattern of response is similar (see Figure 5.2), with 51.5% already reporting that their organisation is better managed, with a further 47% expecting it to be in the future. In total, an overwhelming **98.5% of respondents report that their organisation is already better managed or expect it to be so in the future.**

Figure 5.2: Would you say your organisation is now (or will be) better managed following your Resilient Heritage grant?



Source: DC Research, Resilient Heritage Survey 2020, n=66 (NB: totals may not sum due to rounding)

- 5.9 In terms of better management, the types of **examples** reported in the Resilient Heritage Survey of Projects by those that describe their organisations' as being **significantly better managed** include:
- **Structures** – notably improvements to **governance structures** (e.g. changes to board membership – recruitment of new trustees and removal of previous trustees; introduction of/improvements to (sub)committee structures; improvements to structure of, and reporting from, board meetings).
 - **Staffing** – commonly involving **changes to staffing, management, and organisational culture** (e.g. recruitment of new (appropriately skilled) staff; clearer reporting lines; improved/streamlined line management structures; better collaboration and team working amongst staff).
 - **Systems – improvements via better processes, systems, and policies** now in place (e.g. on financial management and fundraising, organisational performance, intra-organisational communication, health and safety, HR, building/asset maintenance, data collection and recording, etc.).
 - **Strategy – development of relevant strategies** (e.g. production of strategic plans and key documents; having a clear(er) strategy to follow; greater focus on strategic issues; working towards the same mission/vision/plan; developing appropriate strategies to manage the organisation well).
- 5.10 The same types of examples arise for the more recent Resilient Heritage projects (captured via the Resilient Heritage Survey 2020, which asked for examples of improved management). In addition, for more recent projects, **volunteering** is also mentioned by a number of respondents – with increases in the number of volunteers helping to increase capacity and lead to better management.

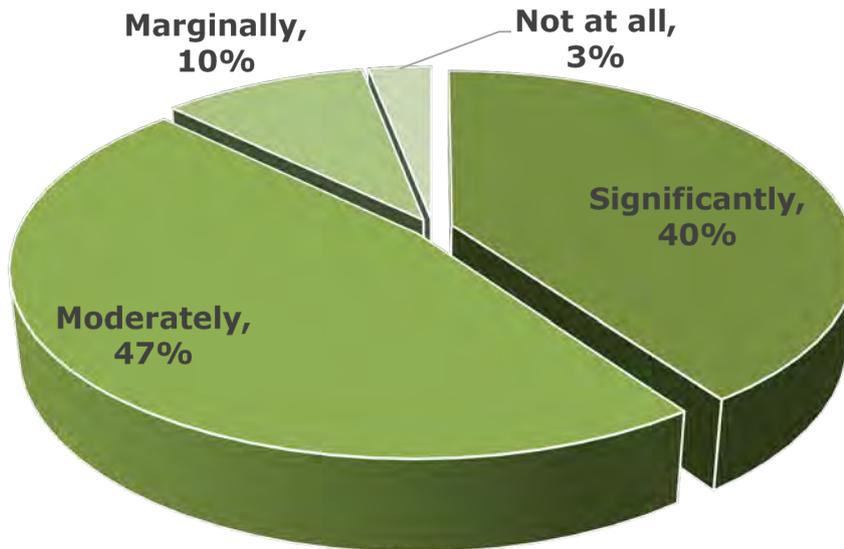
Heritage will be better managed...Examples from the Case Studies

- **Colne Town Council** report that through the 'Restoring Colne heritage - encouraging community use and developing the sustainability of key heritage assets' project the **management of the assets will be improved** through the findings of the condition surveys, conservation plans and options appraisal which includes a series of priced recommendations for repairs and alterations to the buildings (the Council note that the fulfilment any works is conditional on the required funds being raised). The **outcome of the project was especially positive for Colne Town Council who decided to accept the transfer of the Town Hall and the Town Hall extension from Pendle Borough Council.**
- For **Glasgow Building Preservation Trust**, the 'A future for Pollok Stables' project galvanised local interest around Pollok Stables with consultation leading to a **sense of ownership around the proposals for redevelopment.** The engagement events were two-way, with former residents and staff providing insight and information on the historic operation of the Stables providing a **broader understanding of the issues around the Stables - particularly its historic evolution and current condition.** Recent activity has focused on **consolidation work** on the buildings as well as **considerations around a long-term solution** for the project. It is hoped that recent activity will start to progress some of the findings/recommendations from the project, leading towards a more resilient future for Pollok Stables. The project has been useful in the regard, with the planned consolidation work having taken account of the report findings.
- For **Newcastle City Council**, the 'Implementing a new delivery model for Newcastle's parks – Parks Charitable Trust' project has been delivered and all the objectives have been achieved – in **March 2019 all of Newcastle City Council's parks and allotments transferred to The Newcastle Parks and Allotments Trust** (now renamed Urban Green Newcastle). Urban Green Newcastle is *'an independent charity responsible for the management and upkeep of the city's 33 parks and 61 allotment sites'*.
- The report from the Royal West of England Academy's 'Putting the RWA in the Picture' project was used in the RWA's **successful application for Listed Building Consent.**

Skills Development...

5.11 Amongst those projects that are completed, or almost complete, Figure 5.3 shows that **87% of organisations report that their staff/trustees/board/volunteers have developed skills following their Resilient Heritage grant**, with 40% reporting that skills have been developed to a significant extent, and 47% to a moderate extent.

Figure 5.3: To what extent have staff/trustees/board/volunteers in your organisation developed skills following your Resilient Heritage grant?

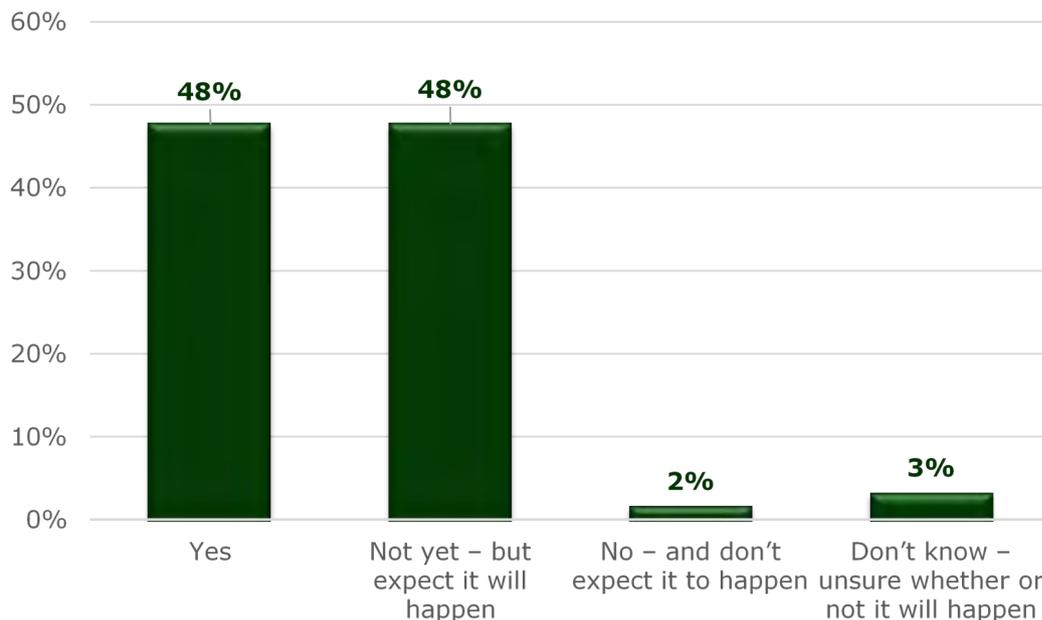


Source: DC Research, Resilient Heritage Survey of Projects, n=134

5.12 Only 3% of organisations report that there has not been any skills development at all following their Resilient Heritage grant.

5.13 For those more recent projects (post October 2018), Figure 5.4 shows that almost one-half of organisations (48%) report that their staff, trustees, board or volunteers have already developed skills following their Resilient Heritage grant, with an additional 48% reporting that they expect this to happen in the future. In total, an overwhelming **96% of respondents report that staff, trustees, board, or volunteers have already developed skills or expect them to do so in the future as a result of their Resilient Heritage grant.**

Figure 5.4: Would you say the staff/trustees/board/volunteers in your organisation have already developed (or will develop) skills following your Resilient Heritage grant?



Source: DC Research, Resilient Heritage Survey 2020, n=63 (NB: totals may not sum due to rounding)

- 5.14 Looking at the individual responses and drawing on the case studies, it is clear that **training opportunities have been provided**, and **skills have been, or are being, developed for trustees/governing body representatives, staff** of various levels, and volunteers.
- 5.15 In terms of the scale or frequency of this by type of role, **trustees/board are mentioned most often (by 40% of respondents)**; followed by staff (29% of respondents); and then volunteers (16%).
- 5.16 In terms of specific skills development activity, the types of **examples** from those organisations that report their **staff/trustees/board/volunteers have significantly developed skills** (as well as those more recent projects that are already reporting skills development) include:
- **Strategy development**, strategic management, organisational sustainability.
 - Improved **understanding about the role of being a trustee/board member**.
 - Organisational **systems and processes** (e.g. financial, HR, legal, compliance – with issues around **finance** being the most common).
 - Income generation and **fundraising** (as well as **advocacy**).
 - **Management** (incl. board management and relationship management).
 - **Volunteers**/volunteer management.
 - Management and interpretation of **heritage**, heritage buildings, heritage assets, etc.
 - Marketing and **communication**.

- Front of house, **customer service, customer care** skills.
- Audience development and **community engagement**.

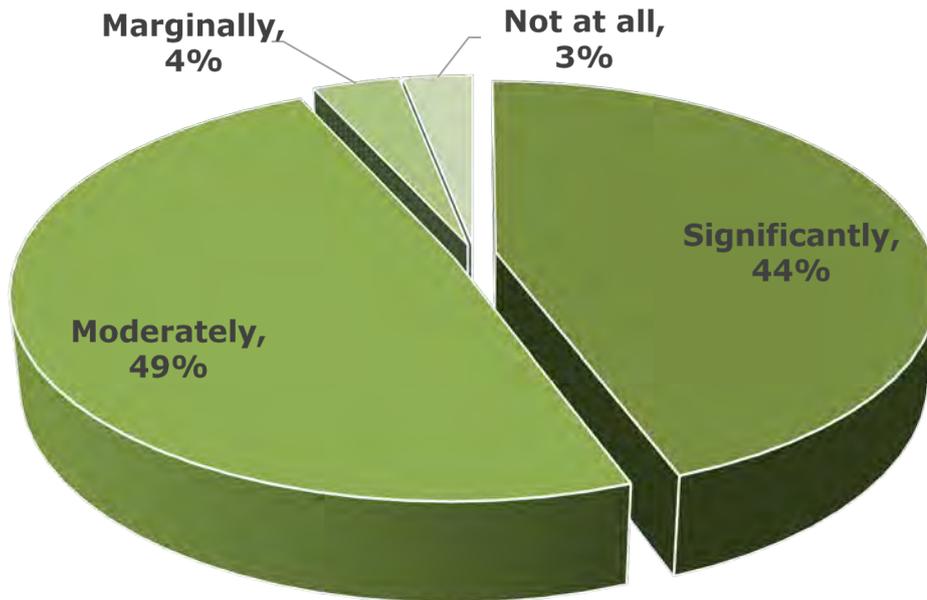
People will have developed skills...Examples from the Case Studies

- For **Experience Community CIC**, the 'Heritage for All' project has enabled the staff and directors to engage in a range of **training opportunities** that have **developed skills across the organisation**. This includes a range of **technical and professional skills** (e.g. staff have attended several training courses including Cytech Modules (bike and equipment maintenance), Trailer Training and Xero Training (online accounts)). The organisation has also undertaken in-house training around filming and presenting with members of staff and a volunteer. In addition, **organisational and business skills** have been supported through the work with the mentors. As part of this, through the assessment of directors' skills, the organisation appointed four new directors to expand the skills and experience within the organisation.
- For **Heritage Lincolnshire**, training events provided through the 'Strengthening Our Business' project on both fundraising and business planning were very well attended and offered volunteers and staff within a range of heritage organisations new skills. Feedback gained by the Trust from these events suggests that attendees have **become more informed and confident in their fundraising and project planning as a result** of this training.
- Through the 'Putting the RWA in the Picture' project the **Royal West of England Academy staff team increased their knowledge and skills, especially around writing grant applications for capital works and fundraising**, (which included visits to other galleries to learn from other organisations). This learning has successfully been put into practice and the learning has also been shared with colleagues in the sector. A robust cost estimate for the required work was produced through the project, along with timings. This detailed information **gave the RWA confidence** that the budgets and timelines are accurate.
- As part of the move to the Plas Gunter Mansion Trust, the **Welsh Georgian Trust** has **recruited five new trustees** – which has enhanced both the capacity and capabilities of the Trust, thereby helping to **develop the skills** of the organisation - providing a wider skills base for the Trust as well as increasing the local presence with the new trustees being local to the area.

More Resilient...

5.17 Amongst those projects that are completed, or almost complete, Figure 5.5 shows that **93% of organisations report that their organisation is more resilient following their Resilient Heritage grant**, with 44% reporting that their organisation is more resilient to a significant extent and 49% to a moderate extent.

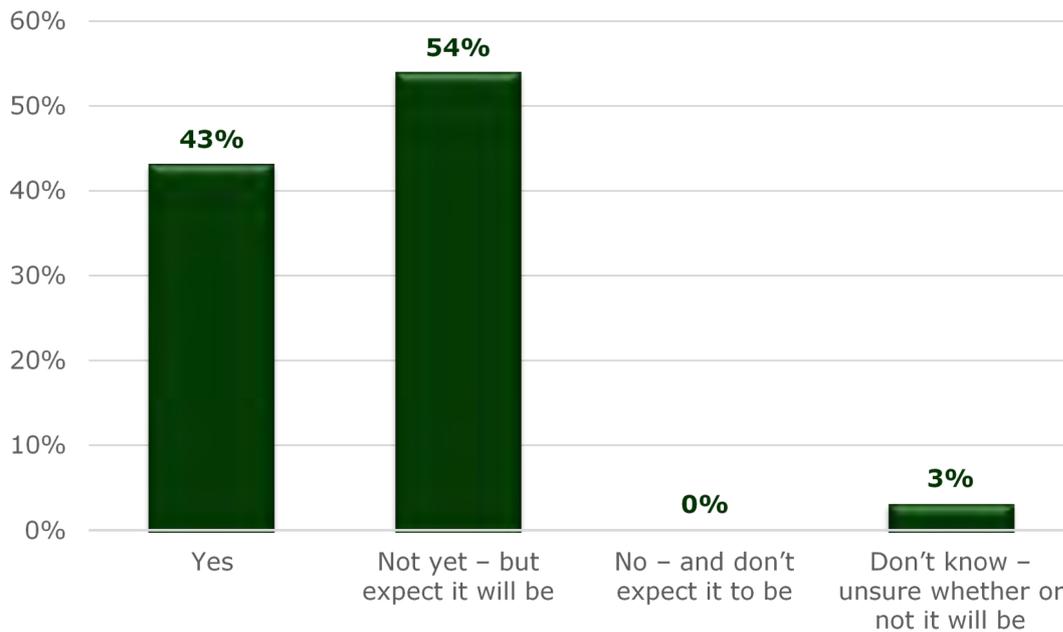
Figure 5.5: To what extent is your organisation more resilient following your Resilient Heritage grant?



Source: DC Research, Resilient Heritage Survey of Projects, n=133

5.18 For those more recent projects (post October 2018), Figure 5.6 shows that 43% of organisations already report that their organisation is more resilient following their Resilient Heritage grant. An additional 54% report that whilst this is not yet the case, they expect that this will happen in the future. In total, an overwhelming **98% of respondents state that their organisation is already more resilient, or that they expect it to be more resilient in the future as a result of their Resilient Heritage grant.**

Figure 5.6: Would you say your organisation is now (or will be) more resilient following your Resilient Heritage grant?



Source: DC Research, Resilient Heritage Survey 2020, n=65

5.19 In terms of increased resilience, the types of **examples** from those organisations that report they are **significantly more resilient** following their Resilient Heritage grant, (as well from those more recent projects that are already reporting increased resilience) include the following. Responses very often reflect the issues raised earlier in this section, showing the better management and skills development clearly contribute to organisations being more resilient:

- **Increased capacity** – notably **staffing** capacity but also **volunteer** capacity both of which have enabled organisations to do more. In addition to which **skills development of staff and volunteers** have increased capabilities.
- **Stronger governance** – through upskilling existing trustees and recruiting new trustees as well as introducing improved governance structures and processes.
- **Stronger financial position** – through increased income streams, more funding, and greater diversification of income sources.
- **Improved management structures and processes** – the introduction of new, or improvements to existing, organisational systems and processes help strengthen the organisation.
- **Clearer plan, purpose, and strategic direction** – with individuals in the organisation (staff, trustees, and volunteers) buying into a common vision and direction, including stronger/clearer long-term planning.
- Organisations having a **more professional outlook/approach**, greater **confidence**, improved **collaboration and joint working** between board/trustees and staff, **improved discipline** in meetings and decision making, and **robust systems and processes**.

Organisations will be more resilient...Examples from the Case Studies

- As a result of the 'Strengthening Our Business' project, **Heritage Lincolnshire created a business manager role** as part of the senior management team. This role has had significant beneficial impact on operations across the Trust. The Trust also learned that **whilst external consultancy for business planning and fundraising can bring a useful perspective and experience to the team, the insight of trustees, staff and volunteers is equally important**. Engagement of trustees was crucial to ensure that all were committed to the same vision and mission.
- **Newcastle City Council** reflect that the aim of the 'Implementing a new delivery model for Newcastle's parks – Parks Charitable Trust' project was to **create a new sustainable body to develop and protect the parks and allotments estate for future generations**. This body has been created - a registered charity - with an openly recruited independent board of trustees and it has been leased the parks and allotments for 125 years. The council openly consulted with the public during the transformation and used their feedback to help shape the charity and its constitution. Newcastle City Council have entered into an agreement with the Trust whereby it will receive the benefit of up to £9.5m over a period of up to 10 years to support it on its way to becoming financially independent. As a result, the council reports that it has safeguarded the jobs that delivered the service and the Trust has already recruited its own new staff.
- Thus far, as part of their Light and Inspiration Appeal, the Royal West of England Academy has secured funding from the National Lottery Heritage Fund, Arts Council England, Garfield Weston Foundation, Wolfson Foundation, and others. **The reports produced through the 'Putting the RWA in the Picture' project have been used to underpin all of these funding applications – and as such, the contribution of the project to the RWA's journey towards resilience is well recognised.**
- In early 2020, The Welsh Georgian Trust became Plas Gunter Mansion Trust, to reflect the refocusing of the Trust on the Plas Gunter Mansion, which was itself the focus of the Resilient Heritage grant. The importance of the Resilient Heritage grant is clear – **for the Trust, the grant 'was absolutely critical' to where they are now on the project**. The change of focus of the Trust indirectly came out of the Resilient Heritage project, and as such it has **helped to change the direction of the organisation** and it is anticipated that **all of these aspects taken together will help to increase the resilience** of the Trust.

- 5.20 Those projects awarded their grants prior to November 2018 were asked in the Resilient Heritage Survey of Projects to describe the impact of their Resilient Heritage project to any change in the organisation’s resilience over time. This was linked to two questions which asked the respondents to score out of 10 (with 0 being low and 10 being high): (i) the current and (ii) the pre-Resilient Heritage award level of resilience for their organisation. The results from these questions are presented below and reaffirm the positive findings presented above about the positive impact that Resilient Heritage grants have had on the resilience of grantee organisations.
- 5.21 Based on the replies to the question about the **resilience of the organisation at the current time, the average score is 6.8** with the median score being 7 (see Table A3.5 in Annex 3).
- 5.22 The **pre-Resilient Heritage award levels of resilience were lower, with the average being 4.1** and the median 4 (see Table A3.6 in Annex 3).
- 5.23 On average, this shows an increase in resilience across the cohort of respondents. To explore this in more detail, comparison of the current and pre-award scores was carried out for each individual response.
- 5.24 The **average change in resilience across all respondents is +2.9**, and the median change is +3 (see Table A3.7 in Annex 3) – clearly showing the increase in resilience reported by survey respondents.
- 5.25 In terms of the specific scale of change, the results are summarised in Table 5.1. Including all 135 replies to this question, **95% of organisations report a positive change in their resilience** (with 3% reporting to change, and 2% reporting a decrease).

Table 5.1: Change in Self-Reported Resilience Score (difference between score at current time and pre-Resilient Heritage award score)

Change in Score	Responses	Percent
0	4	3%
+1	14	11%
+2	39	30%
+3	36	27%
+4	19	14%
+5	14	11%
+6	4	3%
+7	1	1%
+8	1	1%
Total	132	100%

Source: DC Research, Resilient Heritage Survey of Projects, n=132 (NB: the 3 replies reporting a decrease in score are excluded from the table)

- 5.26 A geographic breakdown of these scores is provided in Annex 3 (tables A3.12 and A3.13) and shows that **this positive change reported in resilience occurred across all nations/regions.**

5.27 When explicitly asked about the impact of the Resilient Heritage project to any change in organisations’ resilience, respondents overwhelmingly acknowledged the scale of impact – as shown in Table 5.2 below.

Table 5.2: How would you describe the impact of your Resilient Heritage project to any change in your organisation's resilience over this time?

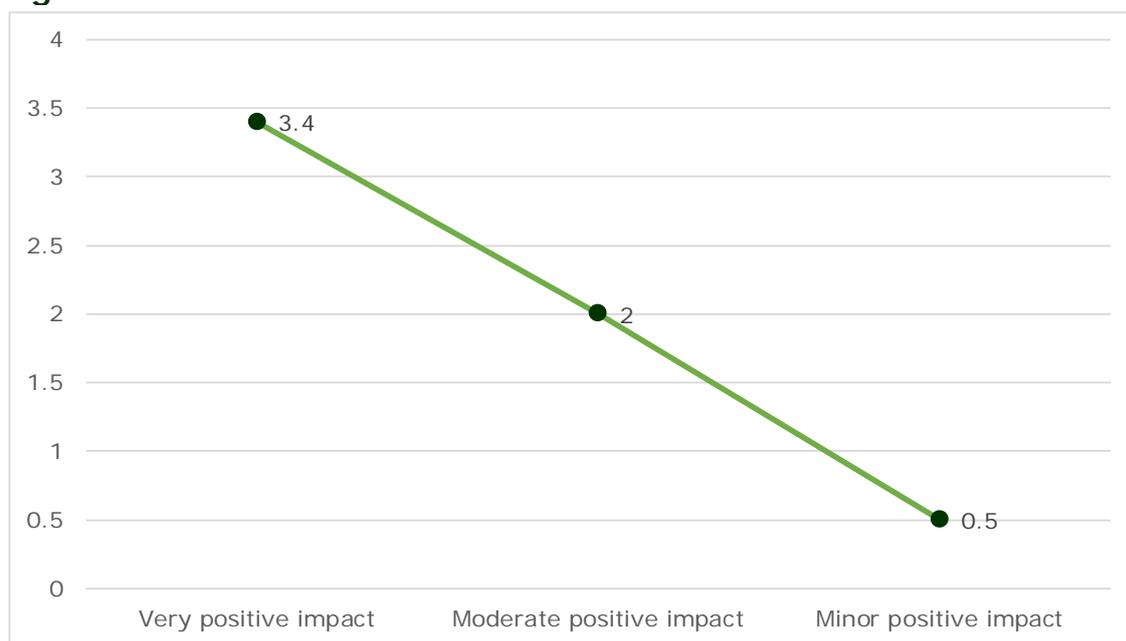
Impact	Percent	Responses
Very positive impact	65%	89
Moderate positive impact	32%	44
Minor positive impact	2%	2
No impact at all	1%	1

Source: DC Research, Resilient Heritage Survey of Projects, n=136

5.28 This shows that **97% of respondents report that their Resilience Heritage award had a ‘very’ or ‘moderate’ positive impact on their organisation’s resilience** – with almost two-thirds (65%) of organisations describing it as a very positive impact.

5.29 The positive relationship between the scale of impact of the Resilience Heritage award and the increase in score can be seen from the results in Table A3.14 in Annex 3, which are presented below in Figure 5.7.

Figure 5.7: Average Change in Scores for: How would you describe the impact of your Resilient Heritage project to any change in your organisation's resilience over this time?



Source: DC Research, Resilient Heritage Survey of Projects, n=132

5.30 Finally, on this aspect, Table A3.15 in Annex 3 shows that the increase in score reported is fairly consistent over time. The results show that projects that completed in 2017 and 2018 report changes that are close to (2018) or above (2017) the average increase for all projects – indicating that there seems to be a legacy and sustainability to the change reported, and therefore a sustainability to the resilience achieved through the Resilient Heritage awards.

- 5.31 This is reinforced by Table A3.16 in Annex 3 which compares the reported scale of impact of the Resilient Heritage project on the change in resilience and the completion date of the project – and shows that the scale of impacts (with the exception of 2017 due to the very small number of completed projects) seem to be consistent over time.

In summary, and focusing on the projects awarded their grants prior to November 2018, **95% of organisations report a positive change in their resilience** (with 3% reporting to change, and 2% reporting a decrease) and **97% of respondents report that their Resilience Heritage award had a 'very' or 'moderate' positive impact on their organisation's resilience** – with **almost two-thirds (65%) of organisations describing it as a very positive impact.**

6. CONCLUSIONS & RECOMMENDATIONS/ISSUES TO CONSIDER

- 6.1 In conclusion, this report has found that there are **clear achievements by Resilient Heritage grantees in relation to all three outcomes** for Resilient Heritage. For completed projects¹⁴, 90% report their organisation is better managed, 87% report that their staff/trustees/board/volunteers have developed skills, and 93% report their organisation is more resilient.
- 6.2 These are clearly strongly positive results, although they should be seen in the context that the general trend in recent years from all survey respondents (i.e. from successful and unsuccessful grant applicants as well as Strength Checker users) is for organisations to report a positive change in their resilience (see Section 3).
- 6.3 In addition, the **evaluation findings about the Resilient Heritage Strength Checker are positive** – more than three-quarters (76%) of survey respondents report that the results are useful, 61% report that using the Strength Checker provided benefits in terms of improving resilience, almost half (47%) have made changes to how they operate as a result of using the Strength Checker and more than eight out of ten respondents (86%) would recommend the Strength Checker to other organisations.
- 6.4 Going forward, The Fund could give further consideration to the following issues emerging from this evaluation.

Understandings of resilience

- 6.5 As noted in Section 3, many of the responses from survey respondents when asked about what resilience means for their organisation were multi-faceted and captured a range of different aspects of the resilience outcome for The Fund¹⁵. As such, it may be the aspects of the outcome that are not mentioned by respondents where further consideration could be given by The Fund:
- In terms of gaps in responses, there is **practically no mention of 'withstanding threats'** in survey responses, and whilst aspects around 'survival' do appear, it is by only a handful of respondents – far fewer than in the previous surveys in 2018 and 2019 where survival was a common theme. This gap is perhaps particularly noteworthy in the current COVID-19 crisis.
 - **In addition, 'fresh sources of expertise and advice' is hardly mentioned** in the responses, with 'advice' not appearing at all, and 'expertise' very infrequently. However, many organisations do recognise the importance of improving the skills of trustees, staff and volunteers – and as such are increasing their sources of expertise via these routes.
 - Also **notable by its absence** (as highlighted in previous evaluation reports) is **reference to working in partnership to 'share services, staff and resources'** – neither 'sharing' nor 'share' appear in any responses, and 'partnership' only appears in relation to responses from

¹⁴ Including those projects that were close to completion at the time of the research.

¹⁵ <https://www.heritagefund.org.uk/publications/outcomes-detail#heading-7>

individual partnerships – the concept of ‘working in partnership’ is not explicitly mentioned by any respondent. It is acknowledged that, when asked what type of changes organisations would expect to see if they became more resilient in the future, working in partnership was mentioned – but only by a small number of respondents.

- 6.6 Going forward, if The Fund is keen for these aspects of resilience (and ‘working in partnership to share services, staff and resources’ in particular) to be further developed, it may be that specific support or advice on how to develop/achieve this is needed by heritage organisations.

Future of the Resilient Heritage Strength Checker

- 6.7 Given the positive feedback about, and benefits of, the Resilient Heritage Strength Checker, it is important to note that according to survey respondents, awareness of the Strength Checker was strongly related to the Resilient Heritage grant application process. Going forward, it will be important for The Fund to give consideration to the promotion of the Strength Checker now that the programme has closed.

- 6.8 If the Strength Checker is to continue (and it is understood that it will do so until 2021 at least), it will be important to ensure that it receives adequate levels of promotion and awareness-raising for relevant organisations – either through The Fund’s grant application processes or by other means.

Ongoing need for resources to support the sector around resilience

- 6.9 One final issue relates to the ongoing need for resources and support for the heritage sector around resilience.
- 6.10 It is acknowledged that The Fund intended to have a *capacity building and organisational resilience* campaign in 2020, although this has been affected by the current COVID-19 crisis. To support the ongoing resilience of the heritage sector, it will be important that heritage organisations can access funding for resilience-related activity going forward. Whilst specific initiatives (e.g. the Business Support and Enterprise Development initiatives supported by The Fund¹⁶) will play an important role, there is also a need for resources to be available to support individual heritage organisations.
- 6.11 The range of issues outlined in Section 3, where heritage organisations were asked what type of changes they would expect to see if their organisation was to become more resilient in the future, provides an indicative list of the areas around which future resilience-related support could be offered:
- **Income and funding** – with increasing core funding and self-generated income getting particular mention. A common theme emerged around taking positive steps to diversify income sources, thereby reducing

¹⁶ <https://www.heritagefund.org.uk/publications/business-support-and-enterprise-development-grants>; <https://www.heritagefund.org.uk/funding/enterprise-development-funding>; <https://www.heritagefund.org.uk/funding/business-support-funding>

reliance on a small number of funding sources. **Increasing the financial reserves** of the organisation was also often mentioned.

- Developing more of a **focus on income generation and fundraising**, including developing and implementing fundraising strategies and business plans as well as having the **capacity to dedicate to fundraising**.
- Changes and improvements to **trustees and governance arrangements** – increasingly around attracting ‘professional’ trustees with relevant skills, knowledge, experience, and capacity. In some cases, restructuring or improving current governance arrangements was highlighted.
- **Increased organisational capacity and capability** – especially recruiting more staff and, in particular, skilled and experienced staff. **Increasing volunteer capacity** was also mentioned by some as a route to addressing capacity and thereby helping to improve resilience.
- **Across trustees, staff and volunteers, increasing skills through training was identified as a route to increasing resilience.**
- **Audience development, diversification of audiences, and increasing and diversifying membership** (where relevant) and boosting the wider support base for the organisation – including enhancing the profile of the organisation with audiences, key stakeholders, and potential funders.
- Introducing, or **improving the strategies/plans as well as the supporting systems and processes** to make the organisation more effective and better managed.
- Finally, one addition to the issues noted in previous reports is around **working in partnership** – with a small number of organisations reflecting that one route to increasing their resilience is to develop more partnerships and increase collaboration.

6.12 When considering these issues, it is important to note that many (if not all) of them were able to be supported through the Resilient Heritage programme. Given the success of the programme for grantees (see Section 5) it is not a failing of the programme that these issues remain – it is a reflection that there is, and will continue to be, an ongoing need for activities and projects on these issues.

6.13 **Resilience is not a static state** that an organisation reaches or acquires and thereafter remains – **becoming and remaining resilient is an ongoing process** that requires an organisation to be constantly adjusting and evolving.

6.14 Whilst the aspiration for the heritage sector is that organisations **become self-resilient** and are able to strengthen and maintain their resilience without the need for external support from The Fund (or other funders), for many heritage organisations this is not yet the position they find themselves in.

- 6.15 As noted elsewhere in this report, those organisations that were unsuccessful with their Resilient Heritage grant application commonly look to the Fund for support (see paragraph 5.3 in Section 5). In addition, a number of those organisations that were successful looked to The Fund to provide support for their next stage of development. According to Resilient Heritage grant award data, thirteen organisations received more than one Resilient Heritage award, and it is understood that a number of Resilient Heritage grantees have also made subsequent, successful applications for other funding from The Fund.
- 6.16 All of this emphasises the importance of the role of The Fund in supporting the resilience of the heritage sector. Whilst The Fund is currently fully focussed on helping to address the impacts of the COVID-19 pandemic on the sector, it will be important that support around resilience continues into the future. As reflected in this report, the role of The Fund in supporting this type of activity is key, as it either does not occur at all, or takes place at a reduced scale otherwise.

ANNEX 1: KEY QUESTIONS FOR THE EVALUATION

The Evaluation Brief for the Resilient Heritage Programme Evaluation stated that the evaluation should address the following overarching questions across the course of the evaluation:

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

ANNEX 2: RESILIENT HERITAGE SURVEY 2020 RESULTS

At each stage of the evaluation (i.e. for the First Interim Report in 2018, the Second Interim Report in 2019 and this Final Report in 2020) a survey was carried out that invited responses from any heritage organisations involved in the Resilient Heritage programme – either as a user of the Strength Checker and/or an applicant to the Resilient Heritage grant programme.

For this Final Report, the survey was sent to organisations that were involved in the Resilient Heritage programme between November 2018 and the end of the programme (those involved from the start of the programme to the end of October 2018 were surveyed as part of the First or Second Interim Reports).

Survey invites were sent by email in January 2020 to a total of 321 different individuals from heritage organisations, based on information provided by The Fund about those organisations that had been involved in the programme.

A total of **128 valid responses** were received, and once the small number of bounce-back/failure emails were discounted (there were 21 such emails), this represented a **response rate of 43%** (i.e. 128 valid replies from 300 invitations).

The results from this survey are presented in the remainder of this annex for those questions where the responses can be presented in tabular format.

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

Heritage Area	Percent	Number
Community heritage	59%	72
Historic buildings and monuments	59%	73
Industrial maritime and transport	16%	20
Intangible heritage	21%	26
Land and biodiversity	29%	36
Museums libraries archives and collections	36%	44

Source: DC Research, Resilient Heritage Survey 2020, n=123

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

Nation/Region	Percent	Number
East Midlands	13%	16
East of England	7%	9
London	11%	14
North East	9%	11
North West	9%	11
Northern Ireland	3%	4
Scotland	7%	9
South East	13%	16
South West	14%	17
Wales	5%	6
West Midlands	9%	11
Yorkshire and The Humber	17%	21

Source: DC Research, Resilient Heritage Survey 2020, n=124

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

Response	Percent	Number
Yes	74%	90
No	18%	22
Don't Know	7%	9

Source: DC Research, Resilient Heritage Survey 2020, n=121

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

Degree of change	Percent	Number
Our organisation has become much more resilient in recent years	17%	16
Our organisation has become more resilient in recent years	61%	57
Our organisation has become less resilient in recent years	21%	20
Our organisation has become much less resilient in recent years	1%	1

Source: DC Research, Resilient Heritage Survey 2020, n=94

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

Response	Percent	Number
Yes	95%	121
No	5%	6

Source: DC Research, Resilient Heritage Survey 2020, n=127

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

Response	Percent	Number
Through the Resilient Heritage grant application process	77%	92
From The National Lottery Heritage Fund website or email communications from The Fund	15%	18
From another website	0%	0
Via direct discussions with The Fund staff	13%	16
Via social media	0%	0
Word of mouth	3%	3
Other (please specify)	4%	5

Source: DC Research, Resilient Heritage Survey 2020, n=120

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

Response	Percent	Number
Yes	93%	111
No	8%	9

Source: DC Research, Resilient Heritage Survey 2020, n=120

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

Response	Percent	Number
Very easy	9%	10
Easy	37%	41

Response	Percent	Number
Neither easy nor difficult	39%	43
Difficult	11%	12
Very difficult	4%	4

Source: DC Research, Resilient Heritage Survey 2020, n=110

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

Response	Percent	Number
Very useful	26%	28
Quite useful	50%	55
Of limited use	21%	23
Of no use at all	3%	3

Source: DC Research, Resilient Heritage Survey 2020, n=109

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

Response	Percent	Number
Yes	61%	66
No	39%	43

Source: DC Research, Resilient Heritage Survey 2020, n=109

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

Response	Percent	Number
Yes	47%	51
No	53%	58

Source: DC Research, Resilient Heritage Survey 2020, n=110

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

Response	Percent	Number
Yes	86%	95
No	14%	15

Source: DC Research, Resilient Heritage Survey 2020, n=110

Table A2.13: Did your organisation submit an application to the Heritage Lottery Fund Resilient Heritage Programme?

Response	Percent	Number
Yes	81%	102
No	19%	24

Source: DC Research, Resilient Heritage Survey 2020, n=126

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

Level of Grant	Percent	Number
Less than £10,000	19%	19
£10,001 to £50,000	27%	28
£50,001 to £100,000	34%	35
£100,001 to £250,000	20%	20

Source: DC Research, Resilient Heritage Survey 2020, n=102

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

Response	Percent	Number
Very easy/ straightforward	10%	10
Fairly easy/ straightforward	59%	60
Fairly difficult	28%	28
Very difficult	3%	3

Source: DC Research, Resilient Heritage Survey 2020, n=101

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

Response	Percent	Number
Very easy/ straightforward	10%	10
Fairly easy/ straightforward	40%	40
Fairly difficult	7%	7
Very difficult	2%	2
N/A - Have not used them	42%	42

Source: DC Research, Resilient Heritage Survey 2020, n=101

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

Response	Percent	Number
Yes	87%	89
No	13%	13

Source: DC Research, Resilient Heritage Survey 2020, n=102

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

Response	Percent	Number
Yes	66%	67
No	30%	31
Don't know - awaiting decision	4%	4

Source: DC Research, Resilient Heritage Survey 2020, n=102

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

Response	Percent	Number
Yes	52%	34
Not yet – but expect it will be	47%	31
No – and don't expect it to be	0%	0
Don't know – unsure whether or not it will be	2%	1

Source: DC Research, Resilient Heritage Survey 2020, n=66

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

Response	Percent	Number
Yes	48%	30
Not yet – but expect it will happen	48%	30
No – and don't expect it to happen	2%	1
Don't know – unsure whether or not it will happen	3%	2

Source: DC Research, Resilient Heritage Survey 2020, n=63

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

Response	Percent	Number
Yes	43%	28
Not yet – but expect it will be	54%	35
No – and don't expect it to be	0%	0
Don't know – unsure whether or not it will be	3%	2

Source: DC Research, Resilient Heritage Survey 2020, n=65

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

Nation/region	Average Score	Lowest Score	Highest Score	Number of Replies
East Midlands	6.2	3	9	15
East of England	5.4	3	9	9
London	6.0	3	9	13
North East	5.3	0	9	11
North West	5.5	3	9	11
Northern Ireland	5.0	3	7	4
Scotland	6.7	5	9	9
South East	5.6	3	9	16
South West	5.8	1	9	17
Wales	6.2	5	9	6
West Midlands	6.1	3	9	11
Yorkshire	5.5	0	9	21
Total/Average	5.6	0	9	122

Source: DC Research, Resilient Heritage Survey 2020, n=122. **Note:** multi-nation/region organisations (i.e. those that ticked more than one region) have been included in the analysis, being counted once in each region they are located within (resulting in 143 at the national/regional level from 122 replies).

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

Response	Average Score	Number of Replies
No	6.2	6
Yes	5.5	116
Total	5.6	122

Source: DC Research, Resilient Heritage Survey 2020, n=122

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

Response	Average Score	Number of Replies
No	5.4	9
Yes	5.5	106
No reply (to Strength Checker question)	6.3	7
Total	5.6	122

Source: DC Research, Resilient Heritage Survey 2020, n=122

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

Response	Average Score	Number of Replies
Our organisation has become much more resilient in recent years	7.2	16
Our organisation has become more resilient in recent years	5.8	57
Our organisation has become less resilient in recent years	4.6	20
Our organisation has become much less resilient in recent years	-	-
No reply (to change in level of resilience question)	4.75	29
Total	5.6	122

Source: DC Research, Resilient Heritage Survey 2020, n=122

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

Response	Average Score	Number of Replies
No	5.8	24
Yes	5.5	98
Total	5.6	122

Source: DC Research, Resilient Heritage Survey 2020, n=122

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

Response	Average Score	Number of Replies
No	5.6	30
Yes	5.4	64
Don't know (awaiting decision)	5.5	4
No reply (to success of application question)	6.0	24
Total	5.0	122

Source: DC Research, Resilient Heritage Survey 2020, n=122

ANNEX 3: RESILIENT HERITAGE SURVEY OF PROJECTS

In addition to the survey outlined in Annex 2 – which has taken place at each stage of the evaluation, a new survey was carried out for this Final Report stage of the evaluation, which focused on Resilient Heritage funded projects – and specifically on projects that had been awarded their grant prior to November 2018. These organisations will have been invited at previous stages for the evaluation to participate in the survey outlined in Annex 2, and this additional survey was aimed at projects that were completed (or close to completion) and sought to identify the final impacts and outcomes from Resilient Heritage funded projects.

This survey was sent to those organisations that successfully applied for a Resilient Heritage grant, and who were awarded their grant prior to November 2018, and were therefore typically expected to have completed their projects at the time of the survey.

Survey invites were sent by email in January 2020 to a total of 269 different heritage organisations, based on information provided by The Fund. A total of **136 valid responses** were received, and once the small number of bounce-back/failure emails were discounted (there were 25 such emails), this represented a **response rate of 56%** (i.e. 136 valid replies from 244 invitations).

The results from this survey are presented in the remainder of this annex for those questions where the responses can be presented in tabular format.

Table A3.1: Which of the following heritage areas does your organisation work in? (please tick all that apply)

Type of heritage	Percent	Responses
Community heritage	59%	80
Historic buildings and monuments	58%	79
Industrial maritime and transport	14%	19
Intangible heritage	16%	22
Land and biodiversity	27%	36
Museums libraries archives and collections	38%	52

Source: DC Research, Resilient Heritage Survey of Projects, n=136

Table A3.2: Which nation/region is your organisation located within?

Nation/region	Percent	Responses
East Midlands	11%	15
East of England	7%	9
London	8%	11
North East	11%	14
North West	14%	19
Northern Ireland	5%	7
Scotland	10%	13
South East	8%	11
South West	8%	11
Wales	5%	6
West Midlands	6%	8
Yorkshire and The Humber	7%	9

Source: DC Research, Resilient Heritage Survey of Projects, n=133

Table A3.3: What level of Resilient Heritage grant did your organisation receive?

Amount	Percent	Responses
Less than £10,000	29%	39
£10,001 to £50,000	27%	36
£50,001 to £100,000	33%	45
£100,001 to £250,000	11%	15

Source: DC Research, Resilient Heritage Survey of Projects, n=135

Table A3.4: How did you find the Resilient Heritage progress reporting and claims/payment processes?

Response	Percent	Responses
Very easy/ straightforward	33%	45
Fairly easy/ straightforward	57%	77
Fairly difficult	10%	13
Very difficult	0%	0

Source: DC Research, Resilient Heritage Survey of Projects, n=135

Table A3.5: On a range from 0 to 10 (with 0 being low, and 10 being high) how resilient would you say your organisation is at the current time?

Average	Median	Lowest	Highest	Responses
6.8	7	0	10	136

Source: DC Research, Resilient Heritage Survey of Projects, n=136

Table A3.6: On a range from 0 to 10 (with 0 being low, and 10 being high) how resilient would you say your organisation was prior to being awarded your Resilient Heritage grant?

Average	Median	Lowest	Highest	Responses
4.05	4	0	9	135

Source: DC Research, Resilient Heritage Survey of Projects, n=135

Table A3.7: Difference between resilience score at current time and prior to Resilient Heritage grant award

Average	Median	Lowest	Highest	Responses
2.9	3	0	8	132

Source: DC Research, Resilient Heritage Survey of Projects, n=132 (NB: the 3 replies reporting a decrease in score are excluded from the calculation)

Table A3.8: How would you describe the impact of your Resilient Heritage project to any change in your organisation's resilience over this time?

Response	Percent	Responses
Very positive impact	65%	89
Moderate positive impact	32%	44
Minor positive impact	2%	2
No impact at all	1%	1

Source: DC Research, Resilient Heritage Survey of Projects, n=136

Table A3.9: To what extent is your organisation now better managed following your Resilient Heritage grant?

Response	Percent	Responses
Significantly	46%	62
Moderately	44%	59
Marginally	5%	7
Not at all	4%	6

Source: DC Research, Resilient Heritage Survey of Projects, n=134

Table A3.10: To what extent have staff/ trustees/board/volunteers in your organisation developed skills following your Resilient Heritage grant?

Response	Percent	Responses
Significantly	40%	54
Moderately	47%	63
Marginally	10%	13
Not at all	3%	4

Source: DC Research, Resilient Heritage Survey of Projects, n=134

Table A3.11: To what extent is your organisation more resilient following your Resilient Heritage grant?

Response	Percent	Responses
Significantly	44%	59
Moderately	49%	65
Marginally	4%	5
Not at all	3%	4

Source: DC Research, Resilient Heritage Survey of Projects, n=133

Table A3.12: Average Scores by Nation/Region for: How resilient would you say your organisation is at the current time?

Nation/region	Average Score	Lowest Score	Highest Score	Number of Replies
East Midlands	6.3	1	9	15
East of England	6.8	3	9	9
London	6.5	2	9	11
North East	6.6	5	8	14
North West	7.4	5	9	19
Northern Ireland	7.1	5	10	7
Scotland	5.9	0	9	13
South East	7.4	6	9	11
South West	7.2	6	8	11
Wales	7.2	5	8	6
West Midlands	6.8	5	8	8
Yorkshire	6.3	4	8	9
Total/Average	6.8	0	10	133

Source: DC Research, Resilient Heritage Survey of Projects, n=133. **Note:** three respondents gave a score but did not respond to the nation/region question and are therefore not included in the results above.

Table A3.13: Average Change in Scores by Nation/Region for: Difference between resilience score at current time and prior to Resilient Heritage grant award

Nation/region	Average Change	Lowest Change	Highest Change	Number of Replies
East Midlands	3.1	1	7	13
East of England	3.0	0	6	8
London	2.5	0	5	11
North East	2.8	0	5	14
North West	2.7	1	5	19
Northern Ireland	3.0	1	5	7
Scotland	3.1	0	5	12
South East	2.6	2	4	11
South West	2.6	1	5	11
Wales	2.8	1	4	6
West Midlands	3.0	2	5	8
Yorkshire	3.7	2	8	9
Total/Average	2.9	0	8	129

Source: DC Research, Resilient Heritage Survey of Projects, n=129. **Note:** three respondents gave a score but did not respond to the nation/region question and are therefore not included in the results above. One respondent did not reply to both score questions and is excluded, and the 3 replies reporting a decrease in score are also excluded.

Table A3.14: Average Change in Scores for: How would you describe the impact of your Resilient Heritage project to any change in your organisation's resilience over this time?

Response	Average Change	Number of Replies
Very positive impact	3.4	87
Moderate positive impact	2	43
Minor positive impact	0.5	2
No impact at all	-	-
Total/Average	2.9	132

Source: DC Research, Resilient Heritage Survey of Projects, n=132

Table A3.15: Average Change in Score for: When was your Resilient Heritage project completed?

Year	Average Change	Lowest Change	Highest Change	Number of Replies
2017	3.5	2	4	4
2018	2.8	0	6	35
2019	3.0	1	7	50
Early 2020 (Jan Feb)	2.7	1	4	6
Ongoing/not yet complete	2.8	0	8	35
Total/Average	2.9	0	8	130

Source: DC Research, Resilient Heritage Survey of Projects, n=130.

Table A3.16: Cross-tabulation of 'How would you describe the impact of your Resilient Heritage project to any change in your organisation's resilience over this time?' and 'When was your Resilient Heritage project completed?'

Year	Very positive	Moderate positive	Minor positive	No impact at all	Number
2017	50% (2)	50% (2)	-	-	100% (4)
2018	63% (22)	34% (12)	3% (1)	-	100% (35)
2019	68% (34)	32% (16)	-	-	100% (50)
Early 2020 (Jan/Feb)	83% (5)	17% (1)	-	-	100% (6)
Ongoing/not yet complete	63% (22)	34% (12)	3% (1)	-	100% (35)
Total/Average	65% (85)	33% (43)	2% (2)	-	100% (130)

ANNEX 4: RESILIENT HERITAGE CASE STUDIES

This annex lists the Resilient Heritage grantee case studies that were carried out during this final phase of the evaluation in early 2020. Each of the cases are completed projects and they provide examples of the types of activities supported by Resilient Heritage as well as the emerging impacts, achievements and lessons resulting from Resilient Heritage grant support.

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

This is followed by a table that lists all the case studies carried out throughout this evaluation – the previous case studies are available in the prior evaluation reports available via: <https://www.heritagefund.org.uk/publications/resilient-heritage-programme-evaluation>

Table A4.1: Resilient Heritage Case Studies for Final Report

Applicant	Project title	Region	Heritage Area	Grant
Colne Town Council	Restoring Colne heritage - encouraging community use and developing the sustainability of key heritage assets	North West	Historic buildings and monuments	£49,500
Experience Community CIC	Heritage for All	Yorkshire and The Humber	Land and biodiversity	£41,200
Glasgow Building Preservation Trust	A Strategic Renewal of Glasgow Building Preservation Trust and A future for Pollok Stables	Scotland	Historic buildings and monuments	£67,000 and £10,000
Heritage Trust of Lincolnshire	Heritage Lincolnshire - Strengthening Our Business	East Midlands	Historic buildings and monuments	£79,500
Newcastle City Council	Implementing a new delivery model for Newcastle's parks – Parks Charitable Trust	North East	Land and biodiversity	£237,500
Royal West of England Academy	Putting the RWA in the Picture	South West	Historic buildings and monuments	£9,900
The Hockey Museum	Shooting for the Goal: Ensuring a sustainable future for The Hockey Museum	South East	Museums libraries archives and collections	£81,500
The Welsh Georgian Trust	The Gunter Mansion	Wales	Historic buildings and monuments	£10,000

Table A4.2: Resilient Heritage Case Studies – Full List from All Evaluation Reports

Applicant	Project title	Region	Heritage Area	Grant
Colne Town Council	Restoring Colne heritage - encouraging community use and developing the sustainability of key heritage assets	North West	Historic buildings and monuments	£49,500
Experience Community CIC	Heritage for All	Yorkshire and The Humber	Land and biodiversity	£41,200
Glasgow Building Preservation Trust	A Strategic Renewal of Glasgow Building Preservation Trust and A future for Pollok Stables	Scotland	Historic buildings and monuments	£67,000 and £10,000
Groundwork NE	The Reclaimed Lands	North East	Industrial maritime and transport	£9,500
Heritage Trust of Lincolnshire	Heritage Lincolnshire - Strengthening Our Business	East Midlands	Historic buildings and monuments	£79,500
London Borough of Waltham Forest	Chestnuts House Creative Enterprise Centre Feasibility Study	London	Historic buildings and monuments	£79,700
Museum of Homelessness	Building a resilient future for the Museum of Homelessness	London	Museums libraries archives and collections	£9,900
Newcastle City Council	Implementing a new delivery model for Newcastle's parks – Parks Charitable Trust	North East	Land and biodiversity	£237,500
Norman Nicholson Society	Norman Nicholson House survey, feasibility study and concept development	North West	Historic buildings and monuments	£9,900
Pope's Grotto Preservation Trust	Discovering Alexander Pope's Grotto: the pilot project	London	Historic buildings and monuments	£17,200

Applicant	Project title	Region	Heritage Area	Grant
Royal West of England Academy	Putting the RWA in the Picture	South West	Historic buildings and monuments	£9,900
Shambellie House Trust	Developing Shambellie House for workshops and residential courses on photography, arts/crafts, history, environment and wildlife	Scotland	Historic buildings and monuments	£11,400
St John's Hoxton	Strengthening St John's Hoxton	London	Historic buildings and monuments	£49,500
The Bishop's Meadow Trust	The Bishop's Meadow Trust -Undertaking surveys to strengthen knowledge for future planning and management	South East	Land and biodiversity	£9,500
The Guild of St Mary's Centre Lichfield	Revitalisation of St Mary's	West Midlands	Museums libraries archives and collections	£38,500
The Hockey Museum	Shooting for the Goal: Ensuring a sustainable future for The Hockey Museum	South East	Museums libraries archives and collections	£81,500
The Modernist Society	Increasing resilience and improving sustainability of The Modernist Society	North West	Intangible heritage	£9,900
The Welsh Georgian Trust	The Gunter Mansion	Wales	Historic buildings and monuments	£10,000

Colne Town Council

'Restoring Colne heritage - encouraging community use and developing the sustainability of key heritage assets'

Colne Town Council was formed in 2008 to boost events in the town throughout the year, to manage its allotments and, of course, help represent the interests of the people of Colne within Pendle Borough Council and Lancashire County Council.

The Town Council was awarded a Heritage Lottery Fund grant of £49,500 in early 2017 to investigate the current condition and future usage options for three key heritage buildings (Colne Town Hall, the Town Hall extension, and Colne Municipal Hall) in the town.

The Town Hall (including its contents) and the Town Hall extension were part of an asset transfer from Pendle Borough Council to Colne Town Council at the time of the Lottery-funded project (and consideration was also being given to the potential transfer of the Municipal Hall at that time). The award of the Resilient Heritage grant at that time was therefore *'very helpful'*.

Colne Town Council used the Resilient Heritage Strength Checker as part of the project and found it to be a *'useful tool'* that helped to identify what the needs were.

The approved purposes for the project were to:

- Undertake professional-led condition surveys to assess prioritised repairs for each building.
- Hold four half-day public consultation/engagement events on usage options for each building and promoting project volunteering opportunities via a heritage trail of Colne.
- Carry out professional-led analysis of usage options based on local demand and rental income potential.
- Prepare layout plans and estimate repair costs for each building depicting usage options co-ordinated by conservation-accredited architect and quantity surveyor.
- Prepare buildings Conservation Plan taking into account historic uses and architectural styles.
- Assess staffing and financial implications for CTC's future management of the buildings and skills needs arising from asset transfer.
- Carry out legal options analysis for future building ownership and governance by CTC, charity or CIC.
- Deliver two, two-hour training sessions to CTC councillors (17) and senior staff (four) on heritage asset and risk management, including review of project findings.
- Undertake on-going project evaluation, producing a final report.

The main issue the Town Council wanted to understand was whether the buildings were worthy of continuing support, and there was the potential for the building to

be mothballed otherwise – which would have had a negative impact on the rest of the high street redevelopments.



All of the aims of the project were met, with the following key outputs being produced: Condition survey of the three heritage buildings; Conservation Plan for the three heritage buildings; evaluation of the Colne Town Hall chattels and furniture; residents' consultation regarding potential uses of the three heritage buildings; options appraisal regarding the cost and value of alterations to the three heritage buildings; legal advice regarding the ownership and management of each building; discussion regarding the management of each heritage asset and the resilience of plans for proposed alterations and new uses; final residents' consultation regarding options appraisal.

As such, the Town Council now has 'all the information' that it needs to inform future development plans and make decisions. This includes plans for the commercial development of the Town Hall extension, the development the Town Hall (including an exhibition area), and the decision not to take on the Municipal Hall – although the work carried out through the project is being used by the current occupants of the Municipal Hall to inform their planning.

The development (i.e. internal reconfiguration) of the Town Hall is receiving £100,000 out of revenue budgets – which shows the commitment of the Town Council to the building and the importance of the findings from the project in informing future developments. In addition, the Town Council will be looking for further support from The National Lottery Heritage Fund to help implement the developments set out in the Options Appraisal.

The grant provided by Resilient Heritage is described by the Town Council as '*incredibly valuable*' in what it enabled and supported.

Colne Town Council report that **all three Resilient Heritage outcomes** have been met:

In terms of **better managed** – the Town Council report that the management of the assets will be improved through the findings of the condition surveys, conservation plans and options appraisal which includes a series of priced

recommendations for repairs and alterations to the buildings. (The Council note that the fulfilment any works is conditional on the required funds being raised.)

The outcome of the project was especially positive for Colne Town Council who decided to accept the transfer of the Town Hall and the Town Hall extension from Pendle Borough Council.

The experience of the project helped to **develop the skills of the staff involved** – and for some staff they continue to be involved and will play a role in the next steps/stages for the redevelopment of the Town Hall, ensuring that the skills developed are of continuing benefit to the Town Council.

In terms of the **resilience** of the Town Council as an organisation and the Town Hall as an asset, the project has built **confidence** in the appraisal and development of heritage buildings in **collaboration with local people**.

Other outcomes (in terms of **community and people**) result from the public/resident consultation and include: a clear commitment for regular use of the Town Hall including the development of Colne heritage exhibitions and talks, alongside a strong interest in the use of the Council Chamber for local wedding ceremonies and in the revival of a local history group.

In terms of lessons from the project, Colne Town Council found that:

- It is important not to *'jump too quickly'* when you have the opportunity of an asset transfer.
- Having staff with the appropriate skills and experience – as well as access to external expertise *'from the right people'* (in this case the external project manager and the architects that were used) was key to the success of the project.
- Aspects around taking a cautious approach, ensuring that the project is well budgeted, and that forward planning is important – including ensuring that there is sufficient lead-in time and resources for next steps.
- It is important to ensure that all aspects are clear as part of any asset transfer – e.g. clarity around use of the building and any time.

For more information please see: <https://www.colnetowncouncil.org.uk/>

Experience Community CIC

'Heritage for All'

Experience Community CIC received a Resilient Heritage grant of £41,200 in late 2018 for the 'Heritage for All' project.



Experience Community is a not-for-profit Community Interest Company that provides films and information about walks and other leisure activities for disabled people and the wider community. Experience Community also offer a range of spares, products, accessories, and clothing for accessing the outdoors, as well as full servicing for Mountain Trikes and Handcycles.

The aims/approved purposes of the 'Heritage for All' project were:

- To prepare for growth through governance review, business planning and partnership development.
- Appointment of mentors to work with Experience Community CIC to review governance and undertake a skills audit of the Board to plan for strengthening skills through recruitment, with use of the first mentor to scope out business development options and produce a brief for the recruitment of second mentor to help appraise and agree business development options to feed into a strategic five-year business plan.
- Development of other supporting documents (for example, a marketing plan) and review company policies/procedures to support growth.
- To scope potential for development of accredited courses (through the Institute for Outdoor Learning for example) to provide new income for skills development in other organisations.
- Payment of subscriptions for National Council for Voluntary Organisations and Institute for Outdoor Learning (IOL) and attend IOL Adventure for All Conference to build awareness of outdoor learning sector.
- Training courses for existing staff, directors and volunteers; recruitment of volunteers with appropriate training/support costs; and purchase of IT equipment/software.
- External evaluation.

As part of the development of the project, Experience Community used the Resilient Heritage Strength Checker – which helped to identify some of the

weaknesses in the organisation that they are addressing through the Resilient Heritage project. For example, the skills gaps in the organisation for both directors and staff are being addressed through training courses that they anticipate will help to make the organisation more resilient.

As part of the project, Experience Community appointed external consultants as mentors in late 2018 and worked with them during the project. Engagement with the consultants has tailed off towards the end of the project (early 2020) and the organisation is keen to address this as they look to complete the project and finalise the business plan.

One of the **key aspects of the grant was to provide key staff with the development time to explore various opportunities** – and the project has achieved this. For example, Experience Community has worked with the Yorkshire Wildlife Trust in developing their “*Linking the Levels*” project, as well as working in partnership with Natural Resources Wales where Experience Community ran a pilot project to look at different filming techniques and styles, which has led to ongoing discussions about future projects.

The Resilient Heritage grant has enabled the staff and directors to engage in a range of **training opportunities** that have **developed skills across the organisation**. This includes a range of **technical and professional skills** (e.g. staff have attended several training courses including Cytech Modules (bike and equipment maintenance), Trailer Training and Xero Training (online accounts)). The organisation has also undertaken in-house training around filming and presenting with members of staff and a volunteer.

In addition, **organisational and business skills** have also been supported through the project through the work with the mentors. As part of this, through the assessment of directors’ skills, the organisation appointed four new directors to expand the skills and experience within the organisation.

The project enabled the organisation to review what they do, and **identify ways in which the organisation could be made more sustainable and more resilient through various development opportunities** (e.g. the sale of equipment, maintenance of equipment, producing films, charging for organised rambles, etc.).

This activity is all going well so far, but the organisation now has a **better appreciation about how much effort is required to develop such opportunities as well as the time that it can take for such opportunities to pay off**. As such, there is a **current challenge in terms of having the capacity (and resources) within the organisation** to be able to continue to work on developing such opportunities.



Therefore, **whilst Experience Community are not yet fully resilient, they have been able to identify ways in which this can be achieved** – and are currently seeking support to further development, implement and realise these opportunities.

At the time of the case study, the business plan was still to be finalised and the organisation will be working with a consultant on this. Whilst some tasks are still to be completed, and the existing capacity issues highlighted above need to be addressed to enable the organisation to progress to the next stage of development and become more resilient, there are **already positive outcomes from the project** in addition to those set out above. For example, **overall income/turnover for the organisation has increased, as has equipment sales specifically.**

Furthermore, **confidence within the organisation** to talk to other organisations about opportunities has increased – as has the confidence to charge appropriately for the products and services they provide (rather than undervaluing and undercharging for what they do).

In terms of lessons from the project for other organisations:

- It is **important not to promise too much to get the funding** – this can lead to a project that is **overly ambitious in terms of what can be achieved** with the time and resources available.
- Make sure that you **select the most appropriate consultant to be a mentor** – both in terms of their **skills and experience**. Their **location** might also be an important factor in how you engage with them (face to face interactions might be more frequent if they are based close to the project).
- Ensure you have a **clear exit strategy from the funding** so that you do not end up back at square one when the funding period ends.

For more information please see: <http://www.experiencecommunity.co.uk/>

Glasgow Building Preservation Trust

'A Strategic Renewal of Glasgow Building Preservation Trust' and 'A future for Pollok Stables'

Glasgow Building Preservation Trust received two Resilient Heritage grants – one related to the resilience of the organisation itself – 'A Strategic Renewal of Glasgow Building Preservation Trust' for which it received a grant of £67,000 and an award for the project 'A future for Pollok Stables' for which it received a grant of £10,000.

This case study focuses on the 'A future for Pollok Stables' project.

Glasgow Building Preservation Trust (GBPT) was established in 1982 as a charitable trust to rescue, repair, restore and rehabilitate significant, historic buildings at risk across the city. GBPT work in partnership with others to give redundant buildings a new purpose and return them to their communities. The aims of the organisation are to:

- To rescue, repair and restore buildings of architectural and historic merit in Glasgow.
- To participate in the wider urban regeneration of the city.
- To encourage the use of traditional building skills and materials.
- To provide exemplars of best practice in building conservation and design.
- To work in partnership with local communities and key stakeholders.
- To increase awareness and participation in Glasgow's built environment by delivering the city's annual Doors Open Days event.

With funding from the National Lottery Heritage Fund, Glasgow City Council and the Architectural Heritage Fund, Glasgow Building Preservation Trust undertook a feasibility study into the future of the Old Stable Courtyard in Pollok Country Park. The study was commissioned by Glasgow City Council's Land and Environmental Services and was completed in early 2018.

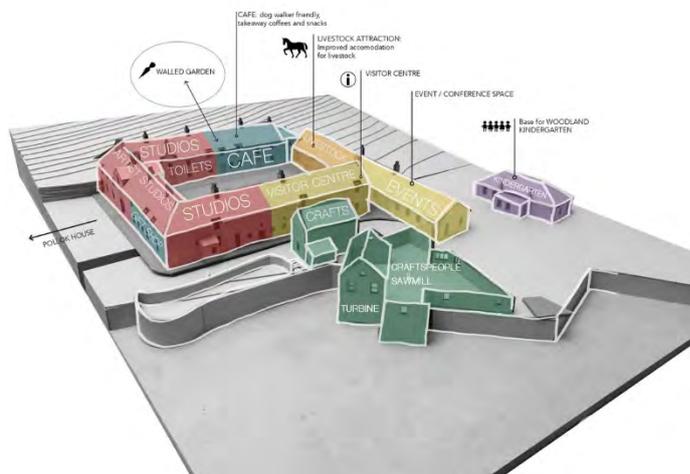
The aims/approved purposes of the Resilient Heritage project were to:

- To develop proposals to investigate the feasibility of an alternative use for Pollok Stables.
- To undertake community engagement and consultation using the options appraisal as a basis for discussion.
- To develop detailed stakeholder engagement to understand the economic drivers and requirements to support commercial or community activity in the stables.
- To develop business case viability by looking at market research and models used at other sites.
- To develop a governance structure model, investigating the issues around ownership, lease, management, maintenance, and board recruitment.
- To develop an outline conservation plan to better understand the heritage significance and needs of the site.



The project team led by Glasgow Building Preservation Trust undertook a public engagement programme, considered the heritage significance of the buildings, developed an outline business case, and considered potential governance options. This involved discussion with stakeholders, park users and potential tenants. As such, all of the approved purposes of the project were achieved in terms of the development of the various aspects – feasibility assessment of alternative use; community engagement; stakeholder engagement; outline business case development; options around governance; and outline conservation plan.

The project looked at the historical and architectural importance of Pollok Stables – although there is much still to be learned about the early development of the site. The design team illustrated how a mix of uses might be accommodated.



The outline business case concluded that 'Option 1 – Pollok Stables united with Pollok House under National Trust for Scotland' was the recommended model. The proposed use would include: Visitor Centre and Education Space; Café; Gift Shop; Event Space; Artists' Studios; Galgael; Furniture Workshop; Woodland Kindergarten; Clydesdale Horses; and Public Toilets. Combined with other project costs and contingencies, the business case found that it is likely that total project costs would be in the region of at least £8.5million.

The outline business case concluded that:

"...this kind of project in the stables can be financially viable but will require efficient management and sound marketing."

The project galvanised local interest around Pollok Stables **with meaningful consultation** that leading to a sense of ownership around the proposals for redevelopment. The engagement events were two-way, with former residents and staff providing insight and information on the historic operation of the Stables and the event providing a **broader understanding of the issues around the Stables - particularly its historic evolution and current condition.**

The project found that there is **significant support for the repair and redevelopment of the Category 'A' listed buildings as a mixed-use attraction which capitalises on the assets of Pollok Country Park.** The Friends of Pollok Country Park group expressed an eagerness to see these buildings saved and were keen to be involved.

Whilst **there has recently (i.e. in early 2020) been action to progress some of the findings and recommendations from the project,** the original project work was completed in 2018 – and there has therefore been a **two-year hiatus** around the project since then.

A **key aspect of this is around governance** – which was identified as, and remains, a **critical issue** for the project – **specifically identifying a robust end user organisation for the site.**

Recent activity has focused on both **consolidation work** on the buildings as well as **considerations around a long-term solution** for the project. As such, it is anticipated/hoped that recent activity will start to progress some of the findings and recommendations from the project – leading towards a more resilient future for Pollok Stables. The report from the Resilient Heritage project has been useful in the regard, with the planned consolidation work having taken account of the findings of the report.

Reflecting on the project, GBPT feel that some of the key lessons learned include:

- **Be bolder and braver in discussing ambitious proposals with stakeholders!** The approach taken with partners may have been too considered and did not garner enough interest, or create sufficient urgency, within stakeholder organisations to progress the Pollok Stables project, which will have contributed to the two-year hiatus.
- Reflection on whether the scale of project (and level of award received) resulted in a reaction of **'just another feasibility study'**. Whilst the report did not do any harm to the progress of the project, it did not enable Pollok Stables to become a priority for Glasgow City Council or provide the momentum required for early action to be taken – which is an ongoing concern in terms of ensuring the future of the site and arresting the decline of the buildings.

For more information please see: <https://www.gbpt.org/> and specifically <https://www.gbpt.org/news/finding-a-future-for-pollok-stables>

Heritage Lincolnshire

'Strengthening Our Business'

Heritage Lincolnshire is a charitable trust working to conserve the rich history of the county for the benefit of people who live and work in Lincolnshire.



As well as being an active Buildings Preservation Trust, currently working on the Old King's Head Kirton, Heritage Lincolnshire has a [commercial archaeology unit](#), runs commercial services and creates opportunities for education, volunteering, and leisure activities, all of which encourage people to explore the heritage of the area and to become actively involved in its conservation.

In 2016 the Trust was facing a dramatic challenge as two critical income streams were under threat:

- A service level agreement with Lincolnshire was reduced by 70% in 2016, and notice was given that it would terminate in 2017.
- Concurrently, the market for commercial archaeology services was also diminished by the immediate impact of the Brexit vote and an increasing number of competitors.

Heritage Lincolnshire's aspirations in undertaking this project were to:

- Review the business model within the Trust to reduce reliance on unreliable sources of income, identify new opportunities and create a clear strategy for future sustainability.
- To develop and promote the charity's objectives and ambitions as a charity to a wider audience.
- To ensure the organisation had the capacity and skills to continue to develop this business model in the future.
- To share the experience, knowledge and advice gained through this project with other community-based organisations within Lincolnshire and the East Midlands.

Heritage Lincolnshire received a Resilient Heritage Grant of £79,500 for "**Strengthening our business**" project.

The production of a new business plan was the most important outcome from the project. The Trust had reached a stage where a new vision and structure was required, and the public perception of the charity needed to be changed from a local government sustained body to a county charity worthy of support.

As result of the project, which involved consultation with trustees, staff, stakeholders and the wider public, the Board to Trustees decided to reassess its vision and mission as an independent charitable body in the 21st century. The

business plan produced by consultants set out key actions that were required to meet this vision within the next 3-5 years and is now used as a working document by the senior management team.

The development of the new business plan allowed the Trust to identify those activities that were core to the charitable objectives of the organisation and those that are needed to support its financial needs.



The consultancy work undertaken as a result of the Resilient Heritage was extended using the Trust's own resources, and as a result of a new focus on asset management, trustees chose to retain ownership of the [Old King's Head in Kirton](#) and manage this asset, rather than dispose of it (as had been the case with its previous project, 116 High Street in Boston). Work on the marketing and charging structure for commercial archaeological services was also reviewed and developed.

Several options and models were considered during the business planning process and, with the preferred outcome being to establish separate trading companies for both commercial archaeological services and the Old King's Head in Kirton (when it opens as a café and B&B in 2020). Whilst there remains progress to be made, Trustees and the senior management team accept that this separation is necessary in order for the Trust's governance and financial procedures to be more robust in the future.

During the project, the Trust was focused on fundraising for the restoration of the Old King's Head in Kirton, and a wider range of fundraising initiatives were enacted for this project. This included community fundraising, crowdfunding, individual donors and a wider range of charitable trust funds. This was only possible due to the additional capacity and budget available through this project.

A wider range of sources of funding were also accessed for other charitable activities, such as the Castles Study Trust and the Marc Fitch Fund, and a higher number of donations were received in 2017/18 and 2018/19 than in previous years, and volunteers have been trained to assist with fundraising at a community level.

Whilst corporate sponsorship was sought to support the Heritage Open Days programme and the walking festivals, the Trust has not yet found a major sponsor. The Lincolnshire Wolds Walking Festival is now being managed by East Lindsey

District Council, the South Lincolnshire Walking Festival has come an end, and the Trust is looking for a self-sustaining solution to Heritage Open Days.

As a result of the project, Heritage Lincolnshire has also been able to attract further sources of funding, generating invaluable learning the Trust and key staff, who as a result are manage campaigns for future projects (such as Greyfriars in Lincoln).

Training events on both fundraising and business planning were very well attended and offered volunteers and staff within a range of heritage organisations new skills. Feedback gained by the Trust from these events suggests that attendees have become more informed and confident in their fundraising and project planning as a result of this training.

As a result of the project, Heritage Lincolnshire:

- Created a business manager role as part of the senior management team. This role has had significant beneficial impact on operations across the Trust.
- Learned that whilst external consultancy for business planning and fundraising can bring a useful perspective and experience to the team, the insight of trustees, staff and volunteers is equally important. Engagement of trustees was crucial to ensure that all were committed to the same vision and mission.

For more information please see: <https://www.heritagelincs.org/>

Newcastle City Council

'Implementing a new delivery model for Newcastle's parks – Parks Charitable Trust'

Newcastle City Council received a Resilient Heritage grant of £237,500 in early 2017 for the project '*Implementing a new delivery model for Newcastle's parks – Parks Charitable Trust*'. The grant was part of a portfolio of funding that contributed to an overall project of £1.8million, and the Resilient Heritage grant therefore accounted for close to 13% of the total expenditure.



The aim of the overall project was to establish a new delivery model for Newcastle's public parks - described initially as a Parks Charitable Trust.

The main driver had been the declining public funding for parks over the last decade. Between 2010-11 and 2015-16 funding for parks in Newcastle was cut by more than 90% (from £2.6million to just under £0.25 million). The basis of the project was first described in 'Fair choices in tough times', Newcastle City Council's Budget Proposals for 2015-16 which outlined an initial approach to addressing this funding challenge:

"Newcastle benefits from many wonderful parks and open spaces, but with cuts in funding these are becoming more difficult for us to sustain at the highest standards. Community and 'Friends of...' groups are making a major contribution and we will support and encourage new and existing groups. We will develop plans for a Civic Parks and Heritage Trust to sustain parks maintenance, to mobilise volunteers and to invest in the future."

The specific aims/approved purposes of the Resilient Heritage grant were:

- Construction of a business case to inform a full business plan to illustrate the viability and sustainability of moving the management of Newcastle parks to an independent Charitable Trust.
- Procurement and delivery of legal and taxation support to advise and draft governance documentation and legal agreements prior for the transfer to Trust status, including obtaining independent 'Red Book' valuations on each space.
- Recruitment of a Culture Change Mentor to work with existing parks' staff in preparation for moving into the new Trust and to develop community support.
- Development and delivery of a programme of public engagement utilising Newcastle City Council staff as well as professional facilitators and Newcastle University's Open Lab to consult across the full range of stakeholders.

- Delivery of a programme of training to the new trustees, staff and volunteers to skill them appropriately for the future governance, management and maintenance of the estate.
- Learning from the project process to be disseminated across the heritage sector, and to be shared via the National Trust's Future Parks website.



The **project has been delivered** and all the approved purposes have been achieved - in **March 2019 all of Newcastle City Council's parks and allotments transferred to The Newcastle Parks and Allotments Trust** (now renamed Urban Green Newcastle). Urban Green Newcastle is *'an independent charity responsible for the management and upkeep of the city's 33 parks and 61 allotment sites'*.

The remainder of this case study looks at what has been achieved, but also the process through which Newcastle City Council and partners achieved this – highlighting some of the key aspects and lessons from key staff involved in the project that may be of benefit to other organisations.

The **scale and ambition of the project was notable** - Newcastle City Council describe it (in their own January 2020 evaluation report on the Resilient Heritage project) as *'one of Newcastle City Council's most complex transformation projects, and also its largest land transaction'*.

The **sensitive political issues** of the project that **had to be navigated** also need to be acknowledged. For the council, this was a transformation project, transferring significant accountabilities to a new and unknown body, creating that body, and transferring to it a hugely valued public estate for 125 years.

A critical aspect emphasised by the project was the **consistent and public leadership delivered by the Council's executive and lead politicians**. The project could not have been delivered without this. As noted by those involved, change such as this must be *'empowered from the top'*.

Those involved highlight that it was **critical for the public and key partners be fully involved** across the full transformation journey to ensure the project's success. This **required a very detailed and extensive consultation programme** which lasted several months, with open feedback sessions continuing to be delivered after the main consultation and decision-making events.

The **scale of public consultation was notable** – it was the second largest such consultation carried out by Newcastle City Council until that point. In addition, the council went to consultation with a 'concept'. This meant that the public asked questions that the council did not know the answer to, as the project was still at the concept stage, and as such, some of the project team were hesitant about consulting on a concept. As a result, the process of public consultation informed the final entity of the Trust – in terms of constitution, legal status etc. **It is**

acknowledged that this process *'worked out'* but that it was *'very resource intensive'*. However, there is also an acknowledgement that the final outcome is better for having been informed by residents themselves.

The **substantial budget within the project for legal and tax advice was a critical aspect for the project**, as was embedding the legal and finance people within the team – making sure they are part of the core team is important for this type of project – **it is critical that the 'core team is fully embedded in the project'**.

A set of **core principles¹⁷ were established** and used to underpin the approach to the design of governance for the Trust – and for those involved these **proved to be 'really helpful' to the process**.

One of the **aspects that was challenging was the 'culture change' required** for those involved in the move to Trust – this was a 'really difficult' part of the project and on reflection could maybe have been done a different way. There are **lessons to be learned in terms of implementing and managing culture change within the organisation**. It was a huge change and it will take time for colleagues within the organisation to realise the change that has occurred and for the staff mindset to change.

Whilst establishing the Trust has been successful, it is acknowledged by core staff *that 'only time will tell'* in terms of the ultimate test – i.e. whether the new approach results in a sustainable and resilient model for parks and allotments in Newcastle. Thus far, there has only been around six months of operation, so *'it is too early to tell'*. Key staff are all of the same view – it can work in terms of long-term viability and sustainability and they stand by the model that has been developed, whilst acknowledging that *how* it is implemented will determine whether or not it is successful in the long run. This will very much depend on the individuals involved – at Board and officer level.

Linked to this, **taking a long-term perspective is important**. A project such as this involved **setting up different relationships and developing different ways of working**. These **all took longer than expected** – and this is an **important lesson from the project**.

Given the scale of overall funding for the project, the role of The **National Lottery Heritage Fund** (in terms of resources) was *'a drop in the ocean'* – as noted above, it **accounted for less than 13% of the total cost**. Those involved in the project feel that it could have done with *'four times that amount'* from The Fund but acknowledge that it was at the upper limit of the funding available via Resilient Heritage programme. A more consistent approach from The Fund in relation to support for this type of transformational project – ensuring that both the national and local/regional perspectives are aligned would have been helpful.

¹⁷ 1. *Council priority*: parks are not a statutory service, but their successful future is a high priority for the Council. 2. *Public ownership*: parks should remain in Council ownership. 3. *Safe and clean*: parks should be clean, and visitors should feel and be safe. 4. *Free access for all*: parks should be free to access and use but charging for some facilities/activities continues and grows. 5. *Existing groups*: integral – part and parcel of any new solutions. 6. *Your Parks*: no decisions without engaging, listening, problem-solving (together), and feeding back. 7. *One City*: equality of resources and enjoyment across all of the City's parks – no single park / individual solutions. 8. *No Privatisation*: parks not transferred to a commercial entity but rather an entity with charitable objectives, which preserves the parks and uses available income sources (including commercial), to run the parks.

Having the National Lottery Heritage Fund as a funder helped to 'grease the wheels' at the City Council – with those involved reporting that the **council may not have funded the project without National Lottery Heritage Fund support**. Having funding from The Fund '*made the case much easier*' in terms of garnering internal support for the project from the local authority.

According to those involved, the project has proved that alternative delivery models for parks can work, and the **project has helped to influence national strategy and policy – e.g. the Future Parks initiative**. The project is a national role model and has had strategic influence at the national level.

The **learning from the project has been a key aspect** – and notable activity has taken place around sharing the learning – through a wide range of forums and initiatives including:

- A national conference that took place in July 2019 where Newcastle City Council shared its journey and learning.
- Project Director Engagements: throughout the project, the Council exchanged learning with others via telephone, email, presentations, and meetings.
- From the outset of the project, and throughout, the Council shared information via its website: <https://www.newcastle.gov.uk/services/environment-and-waste/green-spaces/creating-trust-newcastles-parks-allotments>
- National Trust as part of their Future Parks work implemented and maintained a bespoke website for sharing learning throughout the project.
- Newcastle City Council as member of the Future Parks cohort can share learning with the cohort.
- National Trust has also been sharing learning with other local authorities and bodies on an ad hoc basis.

In conclusion, Newcastle City Council reflect that the aim of the project was to create a new sustainable body to develop and protect the parks and allotments estate for future generations. This body has been created - a registered charity - with an openly recruited independent board of trustees and it has been leased the parks and allotments for 125 years. The council openly consulted with the public during the transformation and used their feedback to help shape the charity and its constitution. Newcastle City Council have entered into an agreement with the Trust whereby it will receive the benefit of up to £9.5m over a period of up to 10 years to support it on its way to becoming financially independent. As a result, the council reports that it has safeguarded the jobs that delivered the service and the Trust has already recruited its own new staff. Furthermore:

- The project has helped to protect the parks. Now that the assets - the parks and allotments - have been transferred, they are protected.
- The funding for parks (up to £9.5million over a period of up to 10 years) is ring-fenced and therefore protected through the Trust model.
- Newcastle City Council were able to achieve this transformation project without having to sell any of the parks at all – which they are pleased to have achieved.
- Newcastle City Council wanted to ensure that '*uniformity of provision*' was achieved across the city - to avoid any imbalance, for example, through '*posh*

parks’ being well looked after with others being neglected which could have occurred under other potential models.

- The model achieved is something ‘*very innovative*’ and ‘*very creative*’ – and the Trust has the agility and the ability to do different things.

In summary (from their own evaluation report) Newcastle City Council note that *“Delivering a transformation project of this complexity requires strong political leadership and ambition, a well-resourced and empowered project team, and excellent partnerships. The City Council has provided and facilitated all of these requirements, which has enabled it to deliver such a successful project.”*

For more information please see: <https://urbangreennewcastle.org/>

Royal West of England Academy

'Putting the RWA in the Picture'

The Royal West of England Academy (RWA) received a Resilient Heritage grant for £9,900 in 2017 for the 'Putting the RWA in the Picture' project.



The RWA – Bristol's first art gallery – brings world-class visual art from around the world to the South West. The RWA's vision is to be the South West's leading centre for the exhibition, exploration and practice of the visual arts, recognised as a place that enriches and nourishes the lives of people from all communities and backgrounds.

Through its extensive programme of exhibitions, events, talks and lectures, the RWA is committed to providing great art for everybody, and to promoting the understanding and enjoyment of art for the widest possible audience.

'Putting the RWA in the Picture' aimed to carry out a range of tasks:

- surveying the roof lanterns and taking appropriate advice
- investigating the options for the lift
- understanding better the options for gallery lighting and improving staff knowledge
- improving the landscaping of the external forecourt and improving seating and signage
- developing the skills of the Facilities Manager and the Head of Development.

A range of consultants were commissioned to carry out various aspects of these tasks – including architects, conservation specialists, cost consultants, structural engineers, and environmental engineers.

Following the modelling of varying interventions in the galleries, the Report's recommendations were:

- Replace the existing glazing in the roof lanterns with a modern glazing system to reduce both solar gain and heat loss, while retaining the existing form and glazing pattern of the lanterns
- Modify the support structure for the lanterns to support the additional load of the new glazing

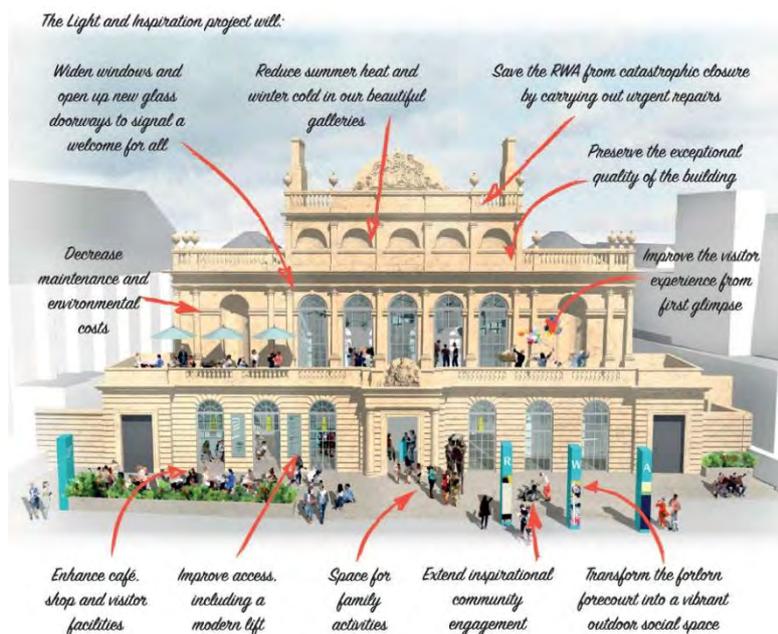
- Introduce opening lights into the lanterns to provide natural ventilation in extreme conditions
- Provide general controllable ventilation through new, carefully positioned openings in the external walls.

As a result of receiving the Resilient Heritage funding, a comprehensive report was produced which the RWA **used to underpin grant applications** for essential work to the RWA's roof lanterns.

Through the Resilient Heritage project **RWA staff team increased their knowledge and skills, especially around writing grant applications for capital works and fundraising**, (which included visits to other galleries to learn from other organisations). This learning has successfully been put into practice and the learning has also been shared with colleagues in the sector.

A robust cost estimate for the required work was produced, along with timings for the project. This detailed information **gave the RWA confidence** that the budgets and timelines are accurate.

The report from the Resilient Heritage project was also used in the RWA's **successful application for Listed Building Consent**.



Following completion of the Resilient Heritage project, an application from the RWA to Arts Council England for the majority of the funding for the work was unsuccessful. However, things have moved on notably since then.

The current campaign **Light and Inspiration Appeal** is a £3.5million project that will achieve the following:

- Make urgent repairs to save the RWA's Grade II* listed galleries from catastrophic failure.
- Bring world-class art and exhibitions to Bristol, attracting 40% more visitors and community users to the RWA.

- Extend RWA's celebrated community and wellbeing programmes so more vulnerable and isolated people can find enjoyment through art and creativity.
- Deliver a step-change in financial and environmental sustainability.

Thus far, the RWA has secured funding from the National Lottery Heritage Fund, Arts Council England, Garfield Weston Foundation, Wolfson Foundation, and others. **The reports produced through the Resilient Heritage project have been used to underpin all of these funding applications – and as such, the contribution of the project to the RWA's journey towards resilience is well recognised.**

For more information please see: <https://rwa.org.uk/about-us>

The Hockey Museum

'Shooting for the Goal: Ensuring a sustainable future for The Hockey Museum'

Early in 2019, The Hockey Museum received a Resilient Heritage grant of £81,500 to undertake the *'Shooting for the Goal: Ensuring a sustainable future for The Hockey Museum'* project.



The Hockey Museum is the first and only museum of hockey in the world. It aims to preserve, share, and celebrate the rich history and heritage of the sport of hockey, not only in Britain where the 'modern' game started, but also from all round the world. The museum, currently located in Woking town centre, is home to a growing collection of hockey archives, artefacts, and memorabilia – and these are made accessible to the hockey family and the wider public through its website, newsletters, displays and other exhibitions.

The Museum was set up as a Trust in the autumn of 2011 before gaining Charitable Status in the summer of 2012. It was awarded Full Museum Accreditation by the Arts Council England in May 2018.

The approved purposes for the project were to:

- Carry out a governance review and create a governance handbook.
- Produce a new business plan and financial model for the Hockey Museum.
- Commission audience research and an Audience Development Plan.
- Commission training for Trustees, staff, and volunteers in a broad range of areas including skills relating to collections management, income generation, people management and marketing.
- Fully acknowledge the contribution of lottery players and the HLF grant.

The Museum did use the Resilient Heritage Strength Checker as part of the development of their project, and whilst it is acknowledged that it was a useful process, it took a notable amount of time and trustees knew what most of the issues were – so it really confirmed what they already thought rather than providing anything new.

The Museum appointed a consultancy company to work with them on the project – with the commission covering the following:

- Audience research and development plan.
- Income generation and business plan preparation.
- Governance Review and Handbook preparation.
- Skills development plan and training.

Each workstream was assigned a lead Trustee to liaise with the consultant in terms of providing documents and information and develop the key elements of each workstream as they unfolded. The consultancy attended a Trustee meeting in late Spring 2019 to agree the work programmes on each workstream.



Following the conclusion of the various workstreams, the Interim Chair and Secretary drafted a Strategic Action Plan for the Museum (for 2019-2024) which incorporated a simple financial model.

The **Strategic Action Plan sets out five key strategic aims** for the Hockey Museum:

- Collecting: collecting, researching and preserving the hockey story.
- Audiences:
 - more engagement online, particularly through social media
 - increased engagement with the Clubs community
 - increased engagement with the Woking community
 - increased engagement with the International community.
- Outreach: reaching out to players and non-players
- Digital: digital by default by 2024
- Sustainability:
 - strengthening the museum's governance and increasing its diversity
 - increasing and broadening the museum's income base
 - developing the museum's skills base through training.

The Hockey Museum is now in the position where the Trustees know what must be done – the challenge will be achieving it. As such, **when considering whether or not the organisation is more resilient** as a result of the Resilient Heritage grant, **there is now a clear understanding about what needs to be done**, which is clearly set out in the Strategic Action Plan – however, this **still needs to be achieved for the Museum to become more resilient**.

The Hockey Museum plans to go back to the National Lottery Heritage Fund to look for funding to support the implementation of the Strategic Action Plan.

In terms of outcomes, the **heritage being better managed** will emanate from the research that was carried out as part of the project – where the actions that need to be taken around the **mobile exhibition; the partnership with England**

Hockey (the primary grant funder); **audience development** (which is key to achieving regular digital engagements, attracting more volunteers, hopefully more donors, and ultimately more physical visits to the museum); and **collections management** and digitisation of the collection have all now been identified.

On skills development, the project helped the Museum to identify key skills that need to be added to the Trustee Board, and also identified some short-term key training courses for staff and Trustees. A number of best practice comparator/benchmark museums that could be visited were also identified, and it is acknowledged that engagement with volunteers needs strengthening and will be prioritised.

Reflecting on the project, there are lessons the Museum would highlight for other organisations:

- The **Audience Research went very well** – and the key messages that came back were very clear, including enhanced use of digital technology; development of a travelling exhibition facility; improvements to the customer offer.
- A ‘lightbulb’ moment for the Museum in forward planning was the need to research and undertake a feasibility study for a **high-quality mobile exhibition** facility to improve audience engagement; to **step up social media** engagement using England Hockey as a key Partner and their social media channels; and to **develop club partnerships slowly and steadily**.
- Once the work on possible new income streams had been completed, the Visioning Day and subsequent drafting of the **Strategic Action Plan** were extremely productive and enabled a new plan for 2020-2024 to be presented to and discussed by all Trustees. This has energised both new and existing Trustees and provided a template for what must be achieved in what order over the next 5 years. It has **starkly identified the funding and skills gaps required to deliver the plan**.
- The **Governance review** was successful in confirming both what and how much needs to be done to improve things. Whilst there is now good understanding about what needs to be tackled in what order over the next few years, the Museum ran out of time and budget to undertake production of a new governance handbook – highlighting the time and effort that this can take.
- The final aspect that went very well was the engagement between staff and Trustees in the **Visioning Day** and **preparation of the key actions** required to develop the Strategic Action Plan 2020-2024. This resulted in energised staff who shared in the whole process of strategy development.
- The project is viewed as a great success by the Museum – although it is noted that it was very demanding on Trustee and staff time. The consultancy was challenging for some trustees at times and this had to be dealt with – as did the mismatch between the ‘theoretical world’ of the consultant and the very ‘practical world’ of the staff and trustees.

For more information please see: <https://www.hockeymuseum.net/>

The Welsh Georgian Trust

'Plas Gunter Mansion'

The Welsh Georgian Trust were awarded a Resilient Heritage grant of £10,000 in early 2018 for a project about 'The Gunter Mansion'. In addition to the Resilient Heritage grant, the Trust received £5,000 from the Architectural Heritage Fund.

The Welsh Georgian Trust was formed in 2011 as a Building Preservation Trust using Architectural Heritage Fund and Charity Commission approved Memorandum and Articles of Association. The objects of the Trust are to preserve for the benefit of the people of Wales and the Welsh Marches and of the Nation, the historical, architectural and constructional heritage that may exist in and around Wales and the Welsh Marches in Georgian and Pre-Georgian buildings (including any structure or erection, and any part of a building as so defined) of particular beauty or historical, architectural or constructional interest.



In early 2020, The Welsh Georgian Trust became Plas Gunter Mansion Trust, to reflect the refocusing of the Trust on the Plas Gunter Mansion, which was itself the focus of the Resilient Heritage grant.

Plas Gunter Mansion is a Grade II* listed, 17th Century, town house formerly belonging to the Gunter family. It contains an incredibly important Catholic chapel dating from the late 17th Century which was hidden for over two centuries and rediscovered in the early 20th Century.

The main aims (approved purposes) of the Resilient Heritage grant were to undertake an architectural conservation survey of Plas Gunter Mansion to establish:

- The extent of surviving historic wall paintings, plasterwork and other features for conservation.
- The building's historical development and original layout.

WGT will use this information to develop restoration plans and proposals for the future use of the building alongside establishing indicative costs.

The aim of the project was to help the Trust better understand the building and start making plans for its future. This specific project was regarded by the Trust

as a prelude to a wider project to restore and find a sustainable use for Plas Gunter Mansion.

Several specialists were appointed to undertake the archaeological investigation, and they worked alongside the Welsh Georgian Trust trustees and the Friends of Plas Gunter Mansion (a group of volunteers working to save the building, which also contains experts and professionals in history and buildings).

The specialists spent several days examining the building, analysing the findings and producing various reports:

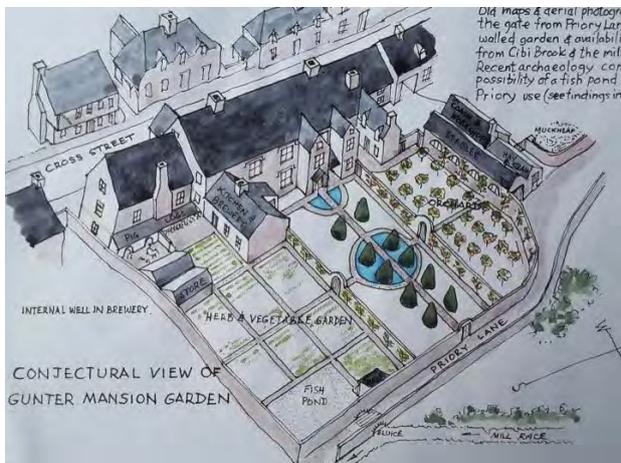
- Archaeological Building Report
- Survey of wall paintings and decorative plasterwork
- Project Viability Report
- Draft Budget Estimate

The Archaeological Building Report has:

- Provided evidence for historic wall paintings, plasterwork, and other features, which are hidden by later material. It partly revealed their condition and indicated the likely conservation issues associated with them.
- Given more clues to the building's historical development and surviving historic fabric, albeit more investigation is needed.
- Suggested the chapel's original extent, layout, and access.

Through the project, the **Trust learned much more about the different building phases and the original layout of Plas Gunter Mansion** - although some questions remain unanswered and others have been raised. It also has a **better understanding of the conservation issues**. From the perspective of the Trust, the result of the work was *'fascinating'* but it *'posed a lot more questions'*.

The Archaeological Building Report allowed the Trust to develop plans for the restoration, layout, and future use of the building. These plans are contained within the Project Viability Report, which also helped the Trust to compile indicative costs to use for a National Lottery Heritage Fund Stage 1 application.



The importance of the Resilient Heritage grant is clear – **for the Trust, the grant ‘was absolutely critical’ to where they are now on the project.**

The Trust submitted an Expression of Interest to The National Lottery Heritage Fund which was accepted in July 2019 and they are currently (April 2020) working on the development phase application. As such, there is progress towards the heritage being **better managed** as a result of the project.

In addition, as part of the move to the Plas Gunter Mansion Trust, the Trust has recruited five new trustees – which has enhanced both the capacity and capabilities of the Trust, thereby helping to **develop the skills** of the organisation - providing a wider skills base for the Trust as well as increasing the local presence with the new trustees being local to the area.

The change of focus of the Trust indirectly came out of the Resilient Heritage project, and as such it has **helped to change the direction of the organisation** and it is anticipated that **all of these aspects taken together will help to increase the resilience** of the Trust.

In terms of other outcomes, the Trust has also been able to maintain the interest of, and support from, members of the public as well as other stakeholders, such as the local authority.

The plan is to restore external and internal features of the early building and remove later inappropriate additions and alterations. The shops will remain, but the intention is that the most historically important rooms will be available to visit. There will also be a visitors' centre and programme of community involvement.

The trust believes this arrangement will allow the building to be financially self-sustaining, while allowing the public to see the most significant rooms and embracing history in a modern context relevant to today. It will also help to regenerate that part of the town, therefore making wider contributions to the local area, community and economy.

In terms of **lessons** for others from the experience of the project, a key aspect is the importance of **managing the project** – being clear about expectations and not making assumptions, keeping a handle on timelines, and who is doing what by when. There is a need to be clear about deadlines and to keep on top of this throughout the project.

As part of this, the Trust has learnt that **communication is paramount – expectations must be clearly discussed** and laid out at the start of a project, with milestones and deadlines defined and a contingency built in.

The Trust acknowledges that, by its nature, the project was a discrete piece of work. However, it has put the Trust in an excellent position to move onto the next stage of their plan for Plas Gunter Mansion.

For more information please see: <https://www.plasguntermansion.org.uk/>